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**THE RISE OF THE ECONOMICS OF EDUCATION. AN OECD PERSPECTIVE**

Mattia Granata\*

**ABSTRACT**

The new discipline of the economics of education promised solutions to the problems arising from backwardness and the advent of mass education. Recently, a new “transnational approach in the history of education” (Ferraz-Lorenzo, Machado- Trujillo, 2020; Martín García, González-Delgado 2020; 5) has emerged which emphasises the role of the international organisations in fostering the evolution of the education systems worldwide. The OEEC-OECD was crucial in spreading the new approach in education for development, and this commitment was also overdetermined by the Cold War and, therefore, inspired by the modernisation theory. In this scenario, this article recalls the role of the OEEC-OECD in affirming the new paradigm, specifically introducing the Italian case, the forerunner in the organisation for the policies regarding Southern Europe. This area was the initial target for the technical assistance activities, and also a laboratory for new development visions and practices.

**Keywords:** OEEC, OECD, education, development, planning, SVIMEZ.

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## **A ASCENSÃO DA ECONOMIA DA EDUCAÇÃO. UMA PERSPECTIVA OCDE**

### **RESUMO**

A nova disciplina da economia da educação prometia soluções para os problemas derivados do atraso e do advento da educação de massa. A OEEC-OCDE foi fundamental na divulgação da nova abordagem da educação para o desenvolvimento, e esse compromisso também foi mediado pela Guerra Fria e, portanto, inspirado na Teoria da Modernização. Este artigo analisa o papel da OEEC-OCDE, o caso italiano, um dos espaços geográficos precursores na organização das políticas relacionadas com o sul da Europa, é abordado de forma específica. Essa área foi o alvo inicial das atividades de assistência técnica, e também um laboratório de novas visões e práticas de desenvolvimento.

**Palavras-chave:** OEEC, OCDE, educação, desenvolvimento, planejamento, SVIMEZ.

## **EL SURGIMIENTO DE LA ECONOMÍA DE LA EDUCACIÓN. UNA PERSPECTIVA DESDE LA OCDE**

### **RESUMEN**

La nueva disciplina de la economía de la educación prometía soluciones a los problemas derivados del atraso y el advenimiento de la educación masiva. La OEEC-OCDE fue fundamental en la difusión del nuevo enfoque en la educación para el desarrollo, y este compromiso también fue mediado por la Guerra Fría y, por lo tanto, inspirado por la Teoría de la Modernización. Este artículo analiza el papel de la OEEC-OCDE, se aborda de forma específica el caso italiano, uno de los espacios geográficos precursores en la organización de las políticas relativas al sur de Europa. Esta área fue el objetivo inicial de las actividades de asistencia técnica, y también un laboratorio de nuevas visiones y prácticas de desarrollo.

**Palabras clave:** OEEC, OCDE, educación, desarrollo, planificación, SVIMEZ.

## **L'ASCENSION DE L'ÉCONOMIE DE L'ÉDUCATION. LA PERSPECTIVE DE L'OCDE.**

### **RÉSUMÉ**

La nouvelle discipline de l'économie de l'éducation avait promis des solutions aux questions soulevées par l'arriération et l'arrivée de l'éducation de masse. L'OCDE a joué un rôle fondamental dans la diffusion de la nouvelle approche éducative au développement. Cet engagement a été fortement influencé par le contexte de Guerre Froide et inspiré par la théorie de la modernisation. Le présent article fait référence au rôle du OCDE, en particulier dans le contexte Italien en tant que précurseur au sein de l'organisation de politiques concernant l'Europe du Sud. Cette région a constitué un premier cible pour l'expérimentation d'activités d'assistance technique ainsi qu'un laboratoire qui a permis de développer des nouvelles visions et pratiques.

**Mots-clés:** OECE, OCDE, éducation, développement, planification, SVIMEZ.

## INTRODUCTION

The so-called *economics of education*, after a short gestation period, quickly established itself as a discipline at the dawn of the sixties and of mass education. Its dissemination was initially helped by some factors in the scientific field, especially, in the emerging interest in the issue of backwardness and the means to foster development. In short, the contextual task to modernise agriculture and create the industrial worker – and the evaluation of the so-called “residual factors” (OECD, 1964) – prompted the orientation to focus on education and training as key factors in the transformation of economy and society (TEXEIRA, 2000; BLAUG, 1966, 1968; WOODHALL, 1967).

For these issues, the growing scientific debate was accompanied by the activism of the main international organisations which were “additional instruments of government which encourage[d] both national self-examination and innovation” (MUSHKIN, 1966, p. 297), and were committed to designing and spreading programmes and practices for policy making in both developed and, increasingly, developing countries.

The analysis of the impact of these organisations’ activities has, over the years, resulted in numerous and interesting studies and led to a new “transnational approach in the history of education” (FERRAZ-LORENZO, MACHADO- TRUJILLO, 2020; MARTÍN GARCÍA, GONZÁLEZ-DELGADO 2020, p. 5; JONES, 1999; YDESEN, 2019).

Moreover, the paradigm of education as a factor of development rapidly spread due to the high political commitment supporting it. On the one hand, in both the developed countries and those defined at the time as “underdeveloped”, the demand for public education grew, while, on the other, the Cold War and decolonisation made the issue a priority on the policy agendas of the main powers where the countries lagging more behind were concerned.

In this setting, the Organisation for European Economic Co-operation, and later, the Organisation for Economic Co-operation and Development (OECD-

OECD)<sup>1</sup>, began to play a role which, in a short time, would become dominant in the area of global education governance. Its member base was made up of the more advanced Western countries, as well as the less developed with colonial legacies and embarking on the road to decolonisation (AUBRAY, 1967, p. 21; WOODWARD, 2009, p. 18; GRIFFITHS, 1997; LEIMGRUBER, SCHMELZER, 2017; SCHMELZER, 2014; CLIFTON, DIAZ-FUENTES, 2015; CENTENO 2017; 2021).

Consequently, in this initial phase, the organisation played an important role in the genesis and the confirmation of the “education-economic growth” paradigm – or “education for development” paradigm (PSACHAROPOULOS, WOODHALL, 1985) – within what has been defined as “world education culture” (RESNIK, 2006; ELFERT, 2019, p. 55).

During the fifties, within the organisation, the convergence of the two spheres of economy and education had arisen from the need to foster the cooperation and economic growth of its member states. In its role as an incubator of the economic policies of the developed countries, the organisation incorporated and expanded the debate on the depressed areas of the Continent. In Europe, once the phase of reconstruction and the Marshall Plan had ended, increasingly obvious and growing differences began to emerge among the economies of the member countries, and in terms of social and cultural development (ALACEVICH, GRANATA, 2021; GRANATA, 2019, 2021; ALACEVICH, 2013, 2018; LORENZINI, 2017).

In the origins of this process, the Italian role was quite significant. Italy, in the mid-fifties, following the previous experiments carried out with the support of the World Bank, had drawn up under the OEEC, the “Vanoni Plan” – a ten-year development programme to deal with the backwardness of the *Mezzogiorno* (Southern Italy) and the fight against unemployment (GRANATA, 2021a). This

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<sup>1</sup> For simplicity, in the introductory discussion and where the time reference covers more phases, both names (OEEC-OECD) are used. When the time reference allows, the acronym that the organisation had at that moment will be used.

initiative was the beginning, within the OEEC, of a new series of projects for member countries with backward areas, beginning with Greece and Turkey which, with Italy, made up the so-called “southern flank” of NATO (HATZIVASSILIOU, TRIANTAPHYLLOU 2016; CHOURCHOULIS 2015). In this context, the policies for education took on, in a short period, a leading role in the organisation, becoming consolidated over the following decades and affirmed as “the hegemonic influence ... on the global education agenda” (ELFERT, 2019, p. 39).

### ***THE MEDITERRANEAN REGIONAL PROJECT***

From 1958, the Committee for Scientific and Technical Personnel (CSTP)<sup>2</sup> operated within the OEEC. It came about as the consequence of the competition between the two spheres of influence following the launch of Sputnik destined to play a widespread and prevalent role in scientific research and, therefore, in education (KING 2006, p. 232; PAPADOPOULOS, 1994, p. 23; TROHLER, 2013, p. 146; 2014, p. 11; 2015, p. 751; ELFERT, 2019; BURGI, 2017, p. 289). It, however, also inherited the experience of more than a decade of the organisation’s work on issues related to the “manpower” in its member countries, developed resulting from the situation in the southern European countries, such as Italy, strongly affected by the high rates of unemployment and the consequent serious problems (GRANATA 2010; VENTRESCA 2017). Focusing its activities on the relations linking labour, science and technical and economic development, it soon found itself confronting the issue of education, and comparing the structures and functioning of the institutions in the different countries (OEEC 1960).

Other organisations, such as UNESCO and the ILO, had, by statute and

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<sup>2</sup> Later renamed the *Office for Scientific and Technical Personnel*, which eventually became part of the *Directorate for Scientific Affairs* (DAS) when the OEEC morphed into the OECD.

for at least a decade, already set their sights on the issue of education as a fundamental human right and key instrument in the promotion of a full citizenship and worldwide social development (ELFERT, 2013; DUEDAHL, 2016, p. 1; SALTHYAMURTHY, 1964; HUXLEY, 1946, p. 29). The OEEC, on the other hand, was the statutory body founded, firstly, to manage the post-war reconstruction and the Marshall Plan and, subsequently, to foster the growth of the member countries integrating them into the international economic systems.

Therefore, during the fifties, it raised the need to update the theoretical and practical instrumentation available to the organisation. The projects and resources up to then aimed at spreading the “gospel of productivity” (BURGI 2017, p. 289; KING, 2006, p. 182), especially through the European Productivity Agency (BOEL 1997; 2003), had quickly shown themselves to be quite inadequate for the needs of Mediterranean Europe. The situation of the countries in this area gave rise to much more inherent and urgent questions regarding the problem of productivity.

Based on this, attention was immediately placed on the link between education and economic growth. The low levels of education were naturally seen as the bottleneck to the industrial transformation of their productive systems and, therefore, the obstacle to pursuing economic development as it was understood in that historical phase.

Consequently, the OEEC became a crossroads for the new visions emerging from the economic studies on the phenomena of lagging development in the post-war period; a forum for the disciplines which more traditionally dealt with education issues to exchange ideas; and, above all, the instrument to respond to the growing interest of the policy-makers of the different countries affected by the rapid and deep changes in the sector.

Throughout the fifties, the contradictions in the imminent “education explosion” began to clearly surface (BEREDAY, LAUWERYS, 1965). This involved, in particular, the experimentation with the consequences of the unplanned and rapid increase in participation in education systems; the

malfunctioning of the latter with the same – or lack of - resources; the growing need for reforms and for considerable public investments to improve efficiency in the systems; the urgency to update the teaching content and practices; the push to orient them towards a goal and a functioning also for relations with the labour market; and, finally, according to some, the need arose - in line with the economic policies then in vogue (GRANATA, 2021A; CHRISTIAN, KOTT, MATEJKA, 2018) – to also plan the evolution in this sector, to establish medium- to long-term policies fostering economic and social development.

While the international organisations began taking steps to deal with these tasks, each with its own objectives and interests in mind – and also in a logic of cooperation and competition -, the OEEC-OECD came up with two important initiatives for the designing and affirmation of the economics of education.

The first of these, begun in 1960, was set up by the Mediterranean Regional Project (ALACEVICH, GRANATA, 2019; PAPADOPOLULOS, 1994; OECD, 1965). The operational project involved Italy, Greece, Turkey, Spain, Portugal and Yugoslavia, and for the first time in the activities of the international organisations, the southern countries were considered as a homogenous group. This had a dual purpose. Firstly, to have a comparative overview of the education systems of the Mediterranean countries. The premises, then confirmed by the studies carried out, suggested that this group undergoing a rapid transformation in the post-war period, also regarding their education systems, had many elements in common, distinguishing them from both the countries in the centre and north of Europe and the non-European countries (UNECE, 1954; OECD, 1974; FUÀ, 1980; PALOMBA, 2018; BAUMEISTER, SALA, 2015; SAPELLI, 1996). Moreover, the MRP had the goal to draw up for a fifteen-year time frame the projections for the needs concerning the workforce and the transformations necessary for the structure, functioning and resources of the education systems to reach the identified objectives.

Therefore, the MRP, was a five-year “pioneering” project based on studies



and technical assistance, where working groups set up by these countries' governments, worked within the organisation to produce and compare the data relative to their own education systems, to draw up methodologies for the planning of resources necessary for their development up to 1975, and to investigate the linkages between the economic and education systems (PAPADOPOULOS, 1994, p. 43; LEIMGRUBER, SCHMELZER, 2017, p. 36). It was a major endeavour on the part of the organisation and the countries involved, with some important outcomes emerging from it. Firstly, it confirmed the so-called “manpower approach”, that is, the conviction that the connections between education, training and the job market could be and should be anticipated (ALACEVICH, GRANATA, 2019, p. 245; ELFERT, 2019, p. 47). Secondly, by focusing on the Mediterranean group, it provided a laboratory that, very quickly, would influence the theories and practices for aiding third world countries (OECD, 1967). Finally, the MRP contributed to establishing analysis and governance methodologies in education which were aimed at unblocking the bottle-neck of backwardness, later further evolving for different purposes, and becoming widely debated (TROHLER, 2014).

The MRP gave rise to both positive and negative reactions. The main criticism revolved around the so-called “manpower approach”, namely, an unquestionable economicistic methodology accused of infringing on the social-cultural aspect of education. The second criticism emerged in a historical perspective, and has been generally agreed upon in recent studies concerning the role of the OECD in education. Thus, in retrospect, observing the MRP experience as a precursor of the present Programme for International Student Assessment, the ill-famed PISA (MORGAN, 2009), the criticism was in individuating in the project the origin of an approach, subsequently confirmed owing to the prevalent role of the OECD in the education sector (TROHLER, 2013; MARTENS, JACOBI, 2010; YDSEN, 2019; KING, 2006). The OECD, beginning with the MRP, practically became “the primary vehicle” for the dissemination of the “educational agenda” of the United States (TROHLER, 2013, p. 151) by means of a global standardisation of education systems and educational content, imposing

methodologies, dominant values and culture – not at all neutral -, and at the expense of the cultural differences rooted in the diverse contexts.

Both of these criticisms highlight important aspects of the early OECD activity, but can be seen under a different light if observed separately from the subsequent evolutions and, therefore, as only relevant to the contemporary situation the project was designed for.

The study of the MRP working groups' papers, for example, was an impetus to reduce a “disinterest” or even an aversion to the social and cultural dimension of the education issue (ALACEVICH, GRANATA, 2019).

The emphasis on the economic dimension actually arose from the organisation's duties and did not exclude the importance of different visions.

Similarly, educational planning and the manpower approach probably formed the embryo of the future methodologies aimed at a “subtle form of cultural imperialism” (ADDAS, 2003, p. 39; SILOVA, MILLEI, PIATTOEVA, 2017); and, otherwise, the context they emerged in was characterised by the experimentation with functional instruments to overcome backwardness through the transference of knowledge and skills, as well as resources. Namely, through social as well as economic investments. The standardisation, afterwards considered as the driver of a debatable dominant thinking and a levelling of cultural differences globally, was initially an important instrument to create methods and criteria to analyse and compare education systems. This was in a phase when the countries involved did not even have any basic statistical data, the common objective being to raise them to acceptable levels of efficiency. Regarding the educational content, there was a clear emphasis placed on promoting skills and training courses for technical and scientific subjects. On the other hand, this need clearly arose in the same countries under study, in the phase undergoing, not only an industrial transition, but more directly an increased pressure, especially concerning secondary school education, due to the growing participation in primary schooling in the immediate post-war period. In short, the direct influence of the international organisations, at least up to the seventies,

appeared to be undoubted, but “more as ideals than as realities” (FERNÁNDEZ SORIA, 2005, p. 33; DELGADO GOMEZ- ESCALONILLA, 2020, p. 128). The more concrete outcomes of the activities carried out in that pioneering phase, even quite important, would appear to have been limited in establishing a common basis for analysis and knowledge and a network of international relations on these issues.

They certainly played a key role in raising the awareness of the need to reform the education institutions, more than directly influencing the educational content itself, even where the technical and technological culture was concerned (HOF, BÜRGI, 2021; GRANATA, 2021B).

In fact, the recent Pisa project, however one chooses to interpret it, and the original OECD activities in the area of education, seem to have been motivated by different reasons, cultures and powers of influence. At the time, there certainly existed the interests of the United States in the arena of the Cold War, however, there also existed the urgent needs of the Southern European countries which, suffering from the objective problems of backwardness, constituted a first laboratory for the study and experimentation of visions and policies. Of course, a hierarchical, but also negotiable, confrontation arose, where the power of the first two did not eliminate and, even for some, depended on responding to the actual needs owing to the situation of the latter.

## **THE WASHINGTON CONFERENCE**

The second initiative consolidating the role of the OECD in confirming the education mainstream in development, involved the ‘Policy conference on economic growth and investment in education’ held in Washington in 1961 (OECD, 1962, 1962A, 1962B).

A forerunner to the meeting was seen in the seminar ‘Economic aspects of educational development in Europe’, held in Bellagio on Lake Como, at the

Rockefeller Foundation in July of 1960. Here, the so-called “Bellagio Doctrine” was drawn up, based on the recent ‘economics of education’ theories and focused on proposing policies to consolidate education systems to foster economic growth (SCHMELTZER, 2016, p. 205-206; GRANATA, 2021C).

Preceded by the organisation setting up a working group of scholars recently interested in the issue, and mainly Europeans (TEXEIRA, 2019, p. 565), the conference aimed at making a comparison of who, in the national and international bodies, held the reins of the responsibility and the budget for education, and who, in the various scientific areas, had made more in-depth studies on the issues in question. Above all, the meeting was the first OECD initiative following the recent successful re-foundation with the entry of the USA as a member country, and the major transformation of NATO’s economic wing, changing it from the “club of the rich” into “a regional organisation with worldwide responsibilities” (OECD, 1962, p. 21; AUBRAY, 1967; JACKSON, 2008; PORTER, WEBB, 2008). Moreover, the organisation brought together almost all the countries with direct responsibilities, for historical reasons, in the areas undergoing decolonisation.

More importantly, the conference was held in the United States of the recently elected President J.F. Kennedy who had renewed the agenda of the global issues and highlighted the task of “strengthening education, health, research, and training activities” (OECD, 1962, p. 35; MARTÌN GARCÌA, DELGADO GÒMEZ-ESCALONILLA, 2020, p. 3).

The starting point involved taking into consideration the new economic thinking which saw investments in education as the prerequisite for economic and social progress based on science and technology. At the same time, underlying the need to develop education, important social factors could be found, education being the prerequisite to eradicate poverty and «raise individuals to a new cultural level and of human dignity» (OECD, 1962: 5).

Other than this twofold “economic” and “social” approach, there was an obvious international political theme. The Cold War and decolonisation had

made the need urgent to deal with the issue of education in the countries lagging behind, so that the Western domain would become consolidated at the expense of the Soviet Union. The latter, on these issues, had actually raised an acknowledged flag of human liberation with the Chairman stating that: “The Head of the Soviet State has made the issue clear; he is convinced that the way of life he represents can more effectively develop the talents of people through education and translate the power of science into a material reality.” (OECD, 1962, p. 5).

In order to manage this expansion in education foreseen in all countries in the coming decade, as well as the increased resources, visions and practices were required, inspired by the scientific debate but guided by objectives and policy demands. The OECD, and the conference, aimed at bringing together all the different arguments, transforming them into an operative plan, and creating an entirely new “conventional wisdom” (JACKSON, 2008), and the first policy recipes to be adopted, widely accepted, so that they would be more easily introduced into the institutional, decisional and opinion making circuits. Of course, this process was not “ideologically neutral”, as it consolidated the prevalent positions and visions and, therefore, to a certain extent dominant, and formalised the “ten commandments of educational assistance” (OECD, 1962B, p. 96-97).

Besides the authoritativeness of the different scholars involved – including some future Nobel laureates such as J. Tinbergen, T. Schulz and W. Arthur Lewis –, a generation of economists of different orientations and schools was formed creating a network of experts around the international organisations, and the strength of the message was due to its authority and the high level of political patronage behind it. In fact, in the first year of his mandate, Kennedy lined up new or renewed organisations to deal with the issue of the development of the less developed nations. With a new emphasis on the modernisation of the poor countries, he launched the “decade of development” and increased financial aid to underdeveloped countries (HAEFELE, 2003, p. 81; OECD, 1967, p. 34;

ROSTOW, 1985, p. 183). Furthermore, these policies for the post-colonial world felt the effects of the influence of the figures involved in the activities of the US administration, such as W.W. Rostow, and of the universities and research centres such as MIT of Boston. As clearly exemplified by the conference in Washington, economic theories influence policies and policies inevitably influence the work of the research centres (HAEFELE, 2003, p. 83).

In brief, in Washington, under the aegis of the US administration and the OECD, “the beginnings of the consecration of the economics of education not merely as a new discipline, but as an area of direct policy relevance and concern” (PAPADOPOULOS, 1994, p. 33) was celebrated. Moreover, the basis for interpreting the crucial decade of the advent of mass education was set, with the creation of a *vademecum* of solutions held to be useful in reforming the education systems (WOODHALL, 1967).

Above all, however, the meeting between science, political and economic interests in the capital of the Western Empire and at the height of the Cold War, showed *in vitro* how the birth of a mainstream could occur.

## **THE OTHER SIDE OF THE COIN**

The Washington Conference was a significant moment in confirming the economics of education which was commonly recognised as being closely tied to “American power” (ELFERT, 2019). Therefore, from this perspective, the reasons identifying the OECD as a key driver in strengthening the theories of modernisation (TIPPS, 1973; WESTAD, 2003; ENGERMAN, GILMAN, HAEFELE, LATHAM, 2003; ENGERMAN, 2004; LATHAM, 2010; MCMAHON, 2013; O.J. MARTIN-GARCIA, 2015; DELGADO GÓMEZ-ESCALONILLA, 2015; MARTÍN GARCÍA, DELGADO GÓMEZ-ESCALONILLA, 2020), and of a potential cultural colonisation concerning education, appear to be clearly ascertained. On the other hand, the observation of the situation in Southern

Europe, the area where the first actions were to be undertaken, and how these visions and activities of the international organisations were considered and adopted, may contribute to forming a more comprehensive analysis.

More recently, there has been a flourish of meetings and studies focusing on the evolution of the education systems in the countries under study and in the period considered here, and their entry into the “global architecture of education” (JONES, 2006, p. 48-49). The importance of the international organisations has been recognised here as agents in fostering the post-war transformation in education systems, and more so in the light of the fact that, evidently, they interacted with many different institutional situations, and not necessarily those of a democratic nature and inclined towards social progress (FERRAZ LORENZO- MACHADO TRUJILLO, 2020).

After the war, and especially during the sixties, these countries also underwent quite important industrial changes and, however, despite progress from many points of view, they continued to “share some distinctive features of weakness in their economic and social structures in comparison with some of the more industrialized member countries” (OECD 1974, p. 7). To avoid any misunderstanding about the concept and the level of “modernity”, the infant mortality rate during the fifties in the Southern European region was “more than double the rates typical of Western Europe” (UNECE, 1954, p. 80).

From an educational point of view, at the height of the post-war transformation, an analysis of a series of standard measurement criteria effectively suggested that the education systems of the Mediterranean countries were placed in between those of the countries considered more advanced and those of the developing ones. The principle of these parameters, namely, the amount of spending on education as a percentage of GNP, actually showed that the region’s average of about 2% was half of the OEEC average, and less than one point compared to the other European countries (HARRIS, 1966).

Less opportunities to access and continue studies for the lower socio-economic groups and for girls; regional differences in the distribution of

institutions, activities and educational resources; a shortage of teachers, schools, classrooms and equipment, especially for secondary schools; higher school dropout rates. These were all problems deeply rooted in the Mediterranean countries, and common to all of them. These, and other fundamental measurement parameters marked the phase of evolution in education in the Mediterranean countries that, also from this point of view, was mainly located in the middle, between the more advanced countries and the emerging so-called “global south”.

In this phase, only Italy and Yugoslavia had a compulsory education of eight years, while for other countries in the region it was still well below that of the Northern European countries, being compulsory for only five or six years (four years in Portugal). The gap widened even more between primary and secondary education, where the average school attendance was below half of most central European countries, as well as that of the USA and the USSR. Of course, quite radical differences also existed from one country to another. Positioned on the two extremes, there were Italy and Turkey. The former had an “established education system” (OECD 1960, p. 3) and, even where repeated regional differences persisted, literacy rates and school attendance were substantially in line with the OEEC country average.

On the other hand, in Turkey, education had begun to be organised only in the early twenties with the foundation of the Republic, and there was still a high adult illiteracy rate. Albeit in the rather complex framework of the Mediterranean countries, regarding all the main indicators for size, functioning and efficiency of the education systems, Turkey clearly was positioned on the bottom rung. Moreover, as a Muslim nation, education was an undoubted instrument of power and the scholastic system was closely involved in the conflict between the “pro-Westerners and anti-Westerners”, which has lasted for centuries and continues even today (DEMİRDAĞ, KHALIFA, 2020, p. 166). Nevertheless, apart from the educational content, Turkey exemplified that the insufficiencies of these countries were mainly structural, as their institutions



were unable to deal with the necessary increase in scholastic participation. Consequently, the most pressing objective was to pursue a “more and better education” and, above all, universal primary school participation. Even at the end of the fifties, while the other Mediterranean countries had more or less already reached the average of the other Western countries for participation at this level, in Turkey, the percentage stood at only 70% (OECD, 1965, p. 20).

On the other hand, whether the goal of investment in education involved fostering economic development or a more general expansion regarding the right to study, possibly respecting traditional cultures, the starting point was the same. At that moment, the Turkish educational system could not have been expected to perform any undertaking, and as such, even the mere transformation where size was concerned was considered to be a “tremendous task” (OECD, 1965, p. 20-21).

In the context of Southern Europe, the importance of the cooperation between UNESCO, the World Bank and the OECD it had just been brought to light involving creating relations with the Spanish Francoist technocrat élite, and to providing, through technical assistance programmes, a stimulus for transforming the Spanish educational system. Delgado Gómez-Escalonilla, in fact, showed how the approach of the MRP became the guide for the Spanish authorities in the different stages of its educational reform (2020, p. 128; 2020A), and how, “in spite of everything”, the pressures of the international organisations “were a shock to a stagnant, reactionary, and class-based system, thus contributing to its gradual transformation” (DELGADO GÓMEZ-ESCALONILLA, 2020, p. 141-142; MARTÍN GARCÍA DELGADO GÓMEZ-ESCALONILLA, 2020).

To examine the relationship between the OECD, the economics of education, and Southern Europe, it is worth noting the role of Italy in the setting up of the MRP; out of all the semi-peripheral countries, being clearly the most semi-peripheral.

## **ITALY: EDUCATION, TRADITION AND MODERNITY**

From the immediate post-war, Italy – a democratic country, grouped with the more advanced members of the OEEC, but divided into two, and suffering from seriously lagging behind other countries, and from problems of backward areas – had taken on a role as a ground-breaker within the organisation, that is, a laboratory for the Mediterranean (GRANATA, 2010; VENTRESCA, 2017; GRANATA 2021).

Here, the effort of attempting to overcome the economic and social backwardness of the widespread underdeveloped areas in the south of the country, had early led to focusing on the issue of education. In particular, the Minister Giuseppe Medici – an agrarian economist by profession and directly involved in the OEEC activities – had promoted a first attempt at planning, called the *Piano decennale della scuola* (Ten-year School Plan) (MEDICI, 1959; MEDICI, 1960; DE RITA, 1958). The experiment had been launched in collaboration with the Association for the Industrial Development of the South (SVIMEZ) which, from the forties had participated under various guises in OEEC-OECD activities as an advisor for the Italian government. It was strengthened and motivated by economists such as P. Saraceno, J. Tinbergen and P. Rosenstein Rodan, and was linked and funded by organisations such as MIT and the Rockefeller Foundation.

Underlying the project, the Italian Ministry for Education and SVIMEZ involved figures from different backgrounds and professions, such as pedagogists, economists and experts on education issues, through seminars and studies going into depth on the “issues and the tasks of the school in the transformation ... of the productive, economic, social and cultural structure of Italian society”<sup>3</sup>.

One of the reasons for this commitment came from the reflections on the

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<sup>3</sup> See Note for Prof. Saraceno of De Rita of June 1959, in the SVIMEZ Historical Archives (ASS), b. 103; e cf. Note for Prof. Saraceno of De Rita of 3 July 1959, in ASS, b. 103.

changes in the productive system and labour market. The Italian society of the fifties was an incubator in a phase of rapid development, and the technological and economic progress underway required a matching of technical skills and “human attitudes”<sup>4</sup>. Yet, the question did not merely come down to just a large scale training in new skills, but required a more general evolution in the country’s culture. Therefore, a considerable part of the responsibility for this desired process of adjustment was relegated to the education and training systems and, especially to the public schools.

For these reasons, the government set up a first commission to deal with the issue of the relationship between economic and social development and the need to inject new cultural values into society and the school. A special reference was made to the training methods of teachers who would have the responsibility to transmit these values<sup>5</sup>: “The existence of the relationship between the school and economic development, even though only recently discovered, is so obvious that there can be no controversy over this”, so began the commission’s report, “The controversy emerges when.... we move on to deal with and establish how it is to be designed” (SVIMEZ, 1960, p. 3).

At that historical moment, the main task attributed to the national education system was to draw up and put in place instruments for a mediation between the traditional cultural values and the modern economic and social situation. The main concern here was to avoid “a hetero-directional tendency, the passive reception of models of consumption and standard cultural values, the disinterest in issues involving social life and public life” that could not be accepted as “the inevitable consequences of the technical, economic and social processes underway” (SVIMEZ, 1960, p. 7).

Therefore, a study on the education systems was carried out to try to deal

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<sup>4</sup> See Primi appunti sull’adeguamento della formazione culturale di base alle trasformazioni sociali connessi al processo di sviluppo della società italiana del 3 novembre 1959, in ASS, b. 103.

<sup>5</sup> See Letter of G. Medici to P. Saraceno of 20 June 1959, ASS, b. 3.

with issues already opened up by “modernisation” without passively subjecting them to its impact. The phenomena of industrialisation, urbanisation, consumption and mass communication; the spreading of new values, cultures, status and habits, other than the widespread aspiration for well-being, had already filtered down into Italian society and the citizens, brought up in an “archaic” world, risked being immediately drawn in, without any cultural filters and values matured elsewhere. Therefore, in the societies undergoing change “the onerous civil and political commitment it involve(d)” was to “fill the cultural void ... where [it was] easy to breach the merely material models” (SVIMEZ, 1960, p. 27).

Indeed, the changes underway in the social and cultural structure resulted in a strong influence on and deep contradictions in the core of Italian society: “up to now there has been clearly seen ... a fictitious cultural modernisation, that is, a simple overlaying of new models of life on the old cultural traditions” (SVIMEZ, 1960, p. 53). Consequently, it was necessary to reflect on a cultural, and not simply functional, policy to support the economic development, fostering traditional values and “encouraging the free growth and expression of the individual” (SVIMEZ, 1960, p. 52).

As a result, a central role was attributed to education which, however, rather than an instrument for social mobility in that phase, was a bottleneck and a factor hindering the access of the lower socio-economic groups (SVIMEZ, 1960, p. 69). The school, in the country’s more backward areas and where certain segments of society such as, for example, women were concerned, continued to mirror and reproduce forms of social organisation and behavioural models not only in many aspects surpassed, but also presenting obstacles to the harmonious adjustments to the change already underway in Italian society. In short, they foresaw and, to a certain degree, attempted to prevent what was later defined as “modernisation without development” (SAPELLI 1996; 2005; SCHNEIDER, HANSEN, 1972).

These analyses and evaluations were the premise on which the other

component of the ministerial commission's work was built. A new role for the school, amongst other things, required understanding the necessary links between education and training, and the characteristics of the country's workforce and productive system. In fact, the fundamental structure of the workforce did not only have to prop up the country's economic development, but was also the first element for social emancipation and citizen economic inclusion. For this, the Italian minister set up another commission made up of experts and representatives from the scholastic world, the public and private sectors and the unions, with the task of attempting to forecast "the needs of the different work sectors for the next twenty years"<sup>6</sup>.

The starting point was that, in 1959, 85% of the employed Italians had only attended primary school or no school at all, 9% lower secondary, and 1.6% a cycle of technical, industrial or agrarian school, however, this percentage dropped to 0.1% in the agricultural sector (SVIMEZ, 1960B, p. 48). In essence, the Italian labour force was made up of "a surfeit of generics, increased by a series of misfits after the Second World War", in which, "the managing class and the technically specialised, [was] fortuitously and casually fuelled without any precise, constant and important contribution from the schools" (SVIMEZ, 1960B, p. 19).

Based on this empirical data, the commission established correlations regarding the forecasts for the Italian economy, changes in the productive system, and the evolution in the necessary skills, and consequent modifications in the education system. The study began from a considerable methodological void and, practically, from a complete lack of data and statistics on the working world, as well as, evidently, of standards and comparable data on an international level.

SVIMEZ's pioneering work, which perfected the methodologies experimented with in the previous years, aroused the interest of the institutions and scholars which made up the international network of the think tank. This included MIT and, especially, other than Rosenstein Rodan, R. Eckaus, who

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<sup>6</sup> See Letter of G. Medici to P. Saraceno of 20 June 1959, in ASS, b. 103.

arrived in Rome to specifically study the methodology for forecasting manpower<sup>7</sup>. For these studies, the Ford Foundation involved SVIMEZ and the Italian institutions in the planning of a seminar to take place in Bellagio under the aegis of the Rockefeller Foundation, and from which emerged the so-called “Bellagio Doctrine” which prompted the conference in Washington. However, above all, this experiment, due to the role assumed by the Italian agency in the fifties within the OECD regarding underdevelopment, from the beginnings of its creation did not go unobserved in Paris, and Alexander King, who managed the OSTP, after repeated visits to Rome, followed with interest its origins and evolution. In this way, this work was thereon linked to the activities that the organisation was about to embark on.<sup>8</sup>

## CONCLUSIONS

Recently, there has been reference to how the study on the activities at the crossroads of the international organisations, the Cold War and the modernisation theory has been able to shed light on how “countries with such diverse political processes developed similar educational and curricular projects in different historical periods” (MARTÍN GARCÍA, GONZÁLEZ-DELGADO 2020, p. 10). From the fifties on, the OECD, together with the main international organisations such as UNESCO, the World Bank, MIT, the Ford Foundation, the Rockefeller Foundation, etc., have generally been considered as among the principal exponents of the modernisation theory and, specifically, tendencies in the field of education. Of course, the underlying interests and reasons were

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<sup>7</sup> See Letter of R.S. Eckaus to Nino Novacco of 25 July 1961, in ASS, b. 103; Letter of R. S. Eckaus to P. Saraceno of 6 June 1961, in ASS, b. 103; Letter of P. Saraceno to R.S. Eckaus of 21 June 1961, in ASS, b. 103; Letter of Nino Novacco to R.S. Eckaus of 21 July 1961, in ASS, b. 103.

<sup>8</sup> See Letter of Robert L. Clark to P. Saraceno of 22 April 1960, in ASS, b. 103; Letter of P. Saraceno to Robert L. Clark of 5 May 1960, in ASS, B. 103; Letter of N. Novacco to Robert L. Clark of 6 May 1960, in ASS, B. 103; Report [of G. Martinoli] for S.E. On. S. [recte G.] Medici of 16 May 1960, in ASS 103; Letter of G. Martinoli to N. Novacco of 13 May 1960, in ASS, B. 103; Letter of G. Martinoli to N. Novacco of 17 May 1960, in ASS, B. 103.

closely linked to the Cold War and its “ideology”, and prompted an unquestionable process involving the transmission of values, instrumentation and culture, anything but neutral, and which, amongst other things, would develop as a mirror image on both sides of the Iron Curtain (THROLER 2013, p. 143; SILOVA, MILLEI, PIATTOEVA, 2017).

The drivers of this transmission were the standardisation and dissemination of data, practices and knowledge, and the engineering of methodologies and content which, managed over the fifties, spread, from the beginning of the following decade, through the mainstream of education for development, the common denominator for all shades of the economics of education. They were the seeds for a governance of the member states’ education systems, firstly, and then, over time, slowly spread worldwide.

On the other hand, the case study on the activities developed by the OECD for education in the Southern European laboratory, in the years of developing this paradigm, suggests that this top-down “para-colonial” process, very clear in intentions and reasons, was not only mono-directional, but also interacted with another process in the opposite direction, that is, bottom-up. It definitely conveyed a quite clear dominant vision, however, the latter, at least in the case of the countries in question, was anything but passively endured or freed from the context where it was intended to be adopted. Instead, it also arose from analyses and methodologies taken from empirical observations in the field on the situation in these objectively backward contexts (MARTÍN GARCÍA, LORENZO DELGADO GÓMEZ-ESCALONILLA 2020, p. 13).

One of the first objectives, for example, was the known development of the secondary school, especially the technical and vocational, and for the scientific and technical skills. This objective clearly reflected the agenda for the evolution of the education systems resulting from the scientific competition between the USA and the USSR (THROLER, 2013, p. 147). However, at the same time, from the viewpoint of the countries under study, this emerged, above all, from the realisation that there was an obvious shortage of these skills, and a need

to move towards developing modern productive systems and more open societies (GRANATA, 2021B). If, on the other hand, this direction stemmed from the need to shape “the right kind of people for *the* modern society” (BURGI, 2017, p. 295), at the same time, it allowed for including in the changes underway vast segments of the population that would have otherwise been excluded, setting in motion the processes of social mobility, cultural elevation, inclusion and an increase in individual and collective well-being.

On this subject, education had certainly been considered a key means for promoting modernisation. However, from the point of view of the countries undergoing change at that historical moment, it was also an instrument to be used to adapt to the modernisation processes occurring, and to cushion the impacts on society, the communities, and the cultures already facing the inevitable external contamination in the increasingly inter-dependent world of the post-war. Therefore, education was seen as an instrument to respond to the changes, an actual support for the necessary evolution in traditional values – often an obstacle especially to social emancipation –, encountering a new already quite existent world.

Of course, to a certain extent, the interpretation of the situation had, in turn, already been externally influenced and steered by the value system and approaches in vogue at the time, as well as the relations of power. Nevertheless, the observations and the methodologies developed in that experimental phase, as they originated from the studies on backwardness, were also useful in drawing up theories. Here, the experimentation carried out in Italy to forecast the manpower needs for the next twenty years, then, later integrated into and developed in the activities of the MRP, appear to be somehow indicative.

Furthermore, as far as these studies having occurred owing to funding from the “productive chain”, characteristic of the modernisation theory, that is, research centres and “big foundations” (NIELESEN, 1973) – and far from disinterested - the cultural points of view that converged in that pioneering phase on innovative issues, such as the link between development and education, were



many, and it would be misleading to relegate them to one only. It has been highlighted, in spite of appearances, as in the framework of the economics of education, the approach of the OEEC-OECD could not be associated with the “human capital theory”, promoted by the economists of Chicago and “strongly anchored in a neoclassical framework” (TEXEIRA 2019, p. 578). The choice of the planning taken by the organisation could actually be put down to the then prevalent Keynesian matrix culture, and to public confidence held up to the eighties, when the international economic paradigm changed (OECD, 1973, 1983, 1989; TEXEIRA 2019, p. 561- 564). This aspect appears probably distorted in observing the countries where the international organisations had to dialogue with technocrats at the service of dictator regimes. Nonetheless, in the Italian case, the economic and sociological cultures that stirred the scholars and institutions involved in the reflections and international activities on the issue, apart from being mainly progressive, were sensitive to approaches to development such as the effect of the bottom-up galvanisation of cultural and social factors in the communities. Consequently, they very quickly began to interest themselves in education.

After all, it was rightly highlighted how “the economics of education approach was welcomed by educationists across disciplines and, to some extent, across the political spectrum” (ELFERT, 2019, p. 47). This almost commonly shared agreement on this new discipline, apart from its natural multiformity, became considered in the light of the actual reality in which the education systems of the countries in question were found, and of the pressures they were subjected to before the advent of mass education. The undeniable need to update and adapt the truly archaic, underdeveloped and inefficient education systems, being, above all, an obstacle to social and cultural mobility and development.

Thus, unblocking the bottleneck of economic and social backwardness, using the lever of education, at least in that initial phase, was a priority regardless of the development model intended to be promoted and of the cultural option underlying the impetus. Perhaps for these reasons, and this convergence of intent

between different approaches and interests, the paradigm of “education for development” spread so rapidly as a global and cultural mainstream.

The data produced by the OECD, which, for the first time, allowed for carrying out comparisons amongst a similar group of countries lagging behind and sharing similar problems, concerned macro and quantitative parameters. From today’s viewpoint, they were quite rough, little or nothing was said of the content, the values and the culture underlying the different education systems. And yet, it is quite evident that they confirmed a generalised insufficiency in these systems to deal with the changes already underway resulting from, first of all, the spontaneous and growing demand for education.

In this scenario, apart from geopolitical reasons, it was difficult not to realise that these were not suitable for the new context. Without huge public investments and the prolonging of the period of schooling, they would not have been able to respond to the agenda of the economists and, certainly, not to the even more demanding objective of extending the right to education on a global scale.

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