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The intricacies of conditionality: education policy review in Greece 2015–2018

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ABSTRACT

Drawing on a historical case study, this article focuses on the ways in which the Greek Government (2015–2019), through involving the Organisation for Economic Cooperation and Development (OECD), managed to modify the education conditionalities laid down by the third Structural Adjustment Programme (SAP) negotiated with the ‘Institutions’ (the European Commission, the European Central Bank and the International Monetary Fund). Using documentary analysis and interviews with top-ranking national educational policy actors, an empirical account is presented of the prolonged encounter between Greek policy-makers, SAP conditionalities, and the policy work of the OECD. The analysis traces the tensions within and between the positions of national and external policy actors as negotiations moved towards a tactical settlement where all sides achieved partial convergence without reaching principled agreement. It reflects on the relevance of the experience of Greece to understandings of global/national relations in the development of educational policy.

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Introduction

The emergence in the field of education of a ‘global governing complex’, that exercises a pervasive influence on policy and practice in national settings, has long been recognised (Sorenson, Ydesen, and Robertson 2021). Its influence varies according to circumstance: the interfaces between the global and the national are ‘divergent and deeply embedded in local histories and contemporary politics’ (Grek 2019, 3). They are sites not only of policy learning and transfer but also of the exercise of ‘institutional power’, shaped by the ‘position, status and legitimacy that countries’ have acquired ‘in the stratified system of states’ that comprises the intergovernmental organization (Cox and Jacobson 1973 in Browes and Verger 2020, 5).

Against this background, this article addresses education policy reform in Greece during the period of structural adjustment between 2010 and 2018. Beginning in 2010, the Greek Government faced a crisis of debt and of sovereignty which has been described as one of ‘the most important and consequential events in world politics of the 21st

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century' (Lim, Moutselos, and McKenna 2019, 325). Greece was required, as a condition of debt bailout, to be compliant with the terms of structural adjustment programmes (SAPs) elaborated by the EU and the IMF as external lenders.

My focus in this paper is on education change during the third SAP, which was formally agreed by a new and radical Left-led Government, and was (in terms of its implementation) more controversial and (in terms of its negotiation) more complex than previous SAPs (Pitsoulis and Schwuchow 2017). In education, it involved, notably, an expanded role for a further external actor, the OECD. This International Organisation (IO), asked to facilitate the implementation of the SAP, entered a lengthy and detailed engagement with Greece, in several phases across a period of two and a half years.

In this historical case study, I focus on the ways in which national actors contributed to modifications of the conditionalities of the third SAP relating to schools and the teaching workforce. Drawing on documentary analysis and interview data with top-ranking national educational policy actors, the paper offers an empirical account of the prolonged encounter between Greek policy-makers, SAP conditionalities and the policy work of the OECD. It analyses the process of production of two OECD policy reviews: the *Preliminary Assessment Report* (OECD 2017) and a Review of National Education Policy (RNEP) *Education for a Bright Future in Greece* (OECD 2018). It aims to add to the literature on managing conditionality and on the ways in which RNEPs contribute to national policy.

Greece, conditionality and the OECD policy review

A growing body of research analysis policy changes in the European South in the face of conditionality (Sacchi 2015; Perez and Matsaganis 2018; Perez et al. 2019; Moury and Afonso 2019), defined as the obligation both to repay loans and to deliver agreed reforms (Nelson 1996 in Spanou 2020, 137). In this literature, Greece is often treated as exemplifying a situation where a heavily indebted country accepts these obligations, so that features of policy which were constitutionally the prerogative of a member state become matters in which the EU and the IMF exercise a dominant influence (Pisani-Ferry, Sapir, and Wolff 2013; Hardiman et al. 2019; Lim, Moutselos, and McKenna 2019).

The reform package consisted of three Memoranda of Understanding (MoUs) – 2010, 2012 and 2015 – which with increasing severity detailed the conditions that had to be met in order to justify continued funding: large-scale spending cuts and policy reform in such areas as labour law, taxation, privatisation, pay and pensions (Featherstone, 2015; Spanou 2020). The sustainability of the package was in doubt from the start (Pisani-Ferry, Sapir, and Wolff 2013; IMF 2017), but it was supervised rigorously by a 'troika' or later a 'quadruple' of international lenders: the European Commission (EC), the European Central Bank (ECB), the IMF and since 2015 the European Stability Mechanism (ESM) – in official parlance known as the 'Institutions'. In pursuit of their programme, the Institutions applied tight deadlines, alongside often intrusive monitoring procedures and sanctions (Theodoropoulou 2018; Jacoby and Hopkin 2019; Goyer, Glatzer, and Deal Real 2021 see also European Stability Mechanism 2021). However, this was not simply a process of external imposition. The agreements had to accommodate domestic opposition and face up to electoral consequences within both debtor and creditor nations; the terms of conditionality needed to be responsive to these exigencies as well

as to trends to economic performance (European Parliament 2013). While the framework of conditionality was set by the lenders, details of policy composition and the timing of their roll-out were subject to regular negotiations. Agenda-setting was fluid, developed in contacts between government ministers and top public administration officials on the one hand, and representatives of the lenders on the other (Hill and Varone 2017). Relationships of trust and the credibility earned by the debtor country in reform implementation could facilitate agenda-setting as well as the government's ideological positioning and domestic legitimacy (Hardiman et al. 2019; Moury and Afonso 2019). Countries thus had some room for manoeuvring and modifying the terms of the package, or even for advancing their domestic policy agendas (Moury, Cardoso, and Gago 2019). Out of these processes could come greater or lesser degrees of 'domestic ownership' – national buy-in to structural reform (Boughton and Mourmouras 2002; Hardiman et al. 2019).

Despite being a site of extensive engagement between the Institutions and national actors, the case of education has received little attention in the literature on the negotiation of conditionality. In particular, the role of the OECD in this process has been overlooked, even though it has had detailed involvement in the reform of education during the period of structural adjustment. There is of course a well-developed research literature on the OECD's work in the global governance of education (see Verger, Fontdevila, and Parcerisa 2019). Whereas some earlier work tended to present the organisation unequivocally as a neoliberal agency (Laval and Weber 2003), such interpretations have been called into question by research suggesting its ambivalence as an organisation, positioned between neoliberalism and social democracy (Lingard and Sellar 2016) or as representing an equity-orientated form of neoliberalism (Browes and Verger 2020). Likewise, researchers have identified a diversity of viewpoints within the OECD, accentuated by its use of policy review teams drawn from a wide pool of experts (Lingard and Sellar 2016).

Most research has focused upon the OECD's ideational role (Martens and Jakobi 2010). It has been viewed as an authoritative knowledge producer (Grek 2017) playing an effective 'ideas game' (Marcussen 2004, 29) through which it 'collects, manipulates and diffuses data, knowledge, visions and ideas' (ibid), 'establishing bridges between international discourses and national politics' and assuming a brokering role between the fields of policy and research (Grek 2017). The organisation is said to work through moral pressure and soft power, instantiated by its production of comparative data, which frames and conditions national decisions (Grek 2009) and by compiling Reviews of National Education Policy (RNEP) at the request of national governments. These are a means by which the organisation is enabled to 'assess and guide a country's policy efforts' (Martens and Jakobi 2010, 7).

Some theoretical approaches to the relationship between the OECD and national states allow for the possibility of ideological friction (Verger 2014) and the mediation and modification of policy recommendations by 'strong local policy coalitions' (Fulge, Bieber, Martens 2016). The main emphasis, however, falls on consensus. Through country reviews, national representatives, external experts and the OECD are seen to enter into a process aimed at achieving agreement on 'a set of best practices and norms for appropriate behaviour' (Browes and Verger 2020, 3). National states are expected to open themselves to examination and critical judgment, against benchmarks provided by

the OECD (Schuller 2005; Marcussen 2004; Mahon and McBride 2009). The review process is interactive, relying on face-to-face meetings and field visits, in a dialogue which may continue beyond the initial review into follow-up activities. By these means, an OECD agenda is said to be internalized among national policy-makers; the OECD's reputation as a policy expert and authorized knowledge producer is consolidated (Grek 2017) at the same time as its epistemic influence on politicians is increased (Carroll and Kellow 2011). Grek (2017) has taken the argument further, suggesting that international reform agendas enter national policy spaces and shape them through a 'slow, continuous and consensual build-up' of policy partnership (Grek 2017, 306) in which policy is co-constructed by national and global actors. The success of the OECD should be understood as the result of the 'socialisation of policy actors within national contexts through policy translation and contextual adaptation' (Grek 2017, 297). Socialisation leads to the construction of a 'common esprit de corps', a sense of 'the right thing to do' (Meyer 2005 in Grek 2017, 297); The OECD is also viewed as depoliticizing education policy: national governments rely on the organisation's perceived expertise to remove educational policy from political controversy (Browes and Verger 2020).

Alongside the literature on managing conditionality in Greece – very limited in regard to education – there is thus a considerable body of work which engages in detail with the educational interface of global governance and national state policy, but which has not yet considered the process of involvement of the OECD in structural reform during the Eurozone crisis. Attention to the case of Greece can address this absence and capture 'another side' of the OECD and another aspect of conditionality processes. The organisation was in effect involved in a process of policy evaluation through conditionality mechanisms. Its usual methods of comparison and advocacy were not suspended, but as we will see, they were to an extent reframed.

Greece: towards 2015

In Greece, there was no national consensus on education policy, but rather a long-running dispute over the terms of 'modernization' (Zambeta 2002). As in other states in the European South, the political debate on the redefinition of the role of the state in the regulation, funding and provision of education had grown in intensity and complexity, especially post-2008 (Guillen and Pavolini 2015; Antunes & Viseu 2019; Traianou and Jones 2019). For some, Greece had been slow at 'modernising' its administrative structures to meet perceived global economic challenges (Featherstone and Kazamias 2001). For others (Zambeta 2019), the country's centralised system of governance was seen not as a problem, but as a precondition for achieving 'equality of opportunity' and democratic accountability, in other words, for consolidating and expanding the post-1974 welfare state.

In 2009, as the first waves of the global financial crisis broke over Greece, the centre-left PASOK government had introduced major education reforms. Under the rubric, the 'New School: the student first', they were an attempt to promote school autonomy and accountability, drawing on the OECD model which had been established earlier in the decade (see Verger, Fontdevila, and Parcerisa 2019). The 2010 Education Act confirmed this policy direction. Using the crisis as an opportunity to 'change education' (Diamantopoulou 2011), the government sought to legitimise and further expand its

programme of reform by commissioning the OECD to carry out a comprehensive review of all education sectors (OECD 2011), not an unusual practice for governments during periods of uncertainty (Steiner-Khamsi 2012).

The result, *Strong Performers and Successful Reformers*, became a reference point for the educational arguments of the following decade. It depicted a ‘failing education’ system with an ‘unsustainable cost-structure’ which was ‘outdated’, ‘centralised’ and ‘ineffective’ (p. 3), lagging behind in its PISA scores and failing to change the behaviours of its teaching force and the governance of its schools. It recommended that Greece should take the first steps towards a comprehensive policy for its underperforming workforce by ‘increasing teachers’ workloads to the EU and OECD averages by 2015’ (p. 35). It made the professional development of school leaders a ‘central priority’ so that they would be ‘empowered with the legitimacy and authority to actually lead their schools’, with the capacity to hire and fire (p. 35). Teachers’ work should be evaluated, with pay linked to evaluation. In terms of governance, the report aimed to promote school autonomy within a framework of ‘outcomes-based accountability and post-audit monitoring’ (p. 60). The ‘rationalization’ of the school network should be a central priority of government (p. 40).

These recommendations, aiming to organize Greek education around NPM principles that had become embedded in other European countries (Pollitt and Bouckaert 2017; Wilkins et al. 2019), landed amid controversy which in the years after the publication of the report grew more intense. The 2010 Education Act had been approved by two-thirds of the Greek Parliament but it was strongly opposed by unions, students and academics and met by wildcat strikes (Traianou 2019). This opposition had a larger context. Between 2010 and 2015, amid great economic turbulence and bailout arrangements made at high social cost, the parties associated with austerity crisis management saw a significant fall in electoral support. PASOK almost disappeared as a political force (Kouvelakis 2011; Afonso, Zartaloudis, and Papadopoulos 2015). Victory in the election of January 2015 – and with it, responsibility for managing the crisis – fell to a government led by SYRIZA, the Coalition of the Radical Left. SYRIZA was strongly associated with the movement against austerity. Its election promises had centred on rebuilding the welfare state and regaining national sovereignty (Spourdourakis 2014; Kouvelakis 2016). These were not promises that were retained. With a majority committed to continuing membership of the Eurozone and faced with the opposition of European leaders, determined not to reward with improved terms what they saw as Greece’s attempts to renege on earlier bailout agreements (Pitsoulis and Schwuchow 2017), by July 2015 SYRIZA reached an impasse. The government signed a third MoU and formed a new government on a programme of compliance and constructive engagement with the Institutions (European Commission/Hellenic Republic/Bank of Greece 2015).

The reform package of the third MoU was built around four pillars (MoU 2015: 5). Pillars One and Two aimed at restoring fiscal sustainability and protecting financial stability. Pillars Three and Four had significant implications for education, regarded as essential to recovery and growth. The third pillar specified labour market and human capital reforms, including the decentralization of collective bargaining and the loosening of employment protection: public servants, such as teachers, would lose employment tenure (MoU 2015: 5). The fourth entailed further reform of public administration on the basis of NPM principles, which had only been very partially

implemented in schools (Sarakinoti and Tsatsaroni 2015; Tsatsaroni; Sifakakis and Sarakinoti 2015). To this end, the '[Greek] authorities with the OECD and independent experts' were charged with the task of preparing by April 2016 'an update of the OECD's 2011 assessment of the Greek education system'. (MoU 2015: 22–3). This review would 'cover all levels of education . . . [including] the implementation of the "new school" reform, the scope for further rationalisation (of classes, schools and universities) . . . the efficiency and autonomy of public educational units, and evaluation and transparency at all levels'. It would propose 'recommendations in line with best practices in OECD countries' (ibid.).

It was only with the third MoU that parties, national and external, became committed to working on a consensual basis within the terms of the loan programme (Andreadis and Stavrakakis 2019). Even so, Greece's policy turn did not resolve all differences between the Institutions and the government.

Post 2015: Greece the OECD and the institutions

The action targets of the MoU were specific: the OECD should work with Greece to develop concrete proposals by May 2016 about the further 'rationalisation' of the school system (increase in teachers' workload, ratios of students per class and per teacher, elaboration of the programme of school amalgamation/clusters) and school and teacher evaluation. The plan should be put into action in 2016–17 with a final implementation target of 2018 (MoU 2015: 22). Although, as in other countries, deadlines for meeting these targets could be negotiated, it was upon their progress that release of structural funds for national policy making depended (Hardiman et al. 2019).

It has been noted (Browes and Verger 2020) that in countries such as the Netherlands, with strong economies and an assured place in the hierarchy of international organisations, it is not difficult for the OECD and national actors to arrive at a common agenda based on convergent interests, symbiotically pursuing their own 'self-interest' to the benefit of both parties (ibid: 15). Greece in 2015 was not such a country. Its economic position was critical. The fiscal consolidation required by the two memoranda was being achieved but at great cost, not least in education. Between 2014 and 15, its education budget decreased by 6% (European Commission/EACEA/Eurydice 2015) and public expenditure for education was at 4.4% in 2014, below the EU-28 average at 5%. Teachers' salaries had been cut back by up to 30%. There had been no permanent teacher appointments since 2010 and the system relied on 25,000 adjunct teachers, employed on annual contracts, whose posts were sustained by European Structural Funds. To the crisis of funding was added the problem of policy divergence. Greece had not situated itself within the main currents of global reform. Though it had participated over the years in several OECD projects (including PISA), it had one of the lowest levels of school autonomy with accountability reforms among EU countries (OECD 2018). The system of school and teacher evaluation introduced by the 'New School' reform, which included explicit criteria for the individual evaluation of teachers with consequences for their employment and tenure, had been frozen by the new government. Unlike 'crisis countries' like Portugal (Carvalho and Costa 2017) and Spain (Verger 2014) where the organization was an invited adviser, Greece had not requested the OECD's return.

This was the starting-point for the production of the OECD's two policy reviews for Greece. The ways in which the composition of these reviews were shaped by the interplay of national and external actors, and their effects on national policy, are the focus of this paper.

Methodology

The paper takes the form of a historical case study. In Robert Stake's words (1995: 47), a case is a 'bounded system,' and the aim of case study is to understand a phenomenon on its own terms rather than how it differs from others, initially at least. Greece had distinct characteristics compared with other EU and OECD member states as they navigated post-2008 crises. In several countries, movements of protest against austerity developed on a large-scale, but none, with the partial exceptions of Portugal and Spain (Martins 2017; Cervera-Marzal 2020) became, like SYRIZA, a governmental actor. In terms of education, Greece, even after the reforms of 2010, remained a state in which NPM reforms had not taken root. The views of the Greek policy actors involved in the third Memorandum process of policy development partly reflected this distinctive historical situation.

In this paper, I rely on data from face-to-face interviews, in Greek, with national actors who had been closely involved in the discussions with the OECD and negotiations with the Institutions more generally: four from the Ministry of Education (MoE) and three from the Institute of Education Policy (IoE).¹ Six of the respondents were still in office at the time of the interviews, which took place in 2019 and 2020. Respondents had been seconded from their permanent posts (academia or schools) to work on aspects of education policy and shared similar perspectives on responding to educational conditionalities. Each interview lasted for about an hour, during which I sought narrative accounts of events, with a particular focus on the interpretations, tactical decisions and evaluations made by the Greek team in the course of their encounter with global organisations. They were recorded and subsequently transcribed and analysed. In their narratives, respondents talked about their role, the ways in which they worked with the OECD and the Institutions, their evaluation of what worked well and of the difficulties involved. What is presented in this paper is to an extent dependent on views from the Greek side. While I have worked hard to avoid this leading to distortion, more work needs to be done in exploring the perspectives of representatives of the international organisations involved in the process.

Gaining in-depth data about a highly significant process of crisis negotiation between a state and international organisations was not easy. It required the help of gate-keepers who were peripheral to the process but whom I could nevertheless mention in my initial contacts with the potential interviewees. Consent for the interviews and for subsequent publication relied on building relationships of trust which took some time to develop.²

Aware that reliance upon one side's accounts might skew the data collection and analysis, I took care to check key elements of the account against documentary sources. The interviews were supplemented by other material, much of it generated by the external organisations. I worked from what are acknowledged to be key documents in the educational policy history of the 2010–2018 period: the three MoU of 2010, 2012, 2015; Greek legislative material; the European Stability Mechanism reports (2015–2021);

IMF reports (2010–2021); and OECD reports (2011; 2017; 2018). I also kept a systematic record of media coverage across the political spectrum. Halfway through the data collection process, an interviewee sent me two documents which provided further valuable insights into the negotiations. One was a memo which summarized a meeting between representatives of the Greek Government and the European Commission (memo to the EC), to discuss and agree the scope of the OECD involvement during 2016–17. The second was the draft OECD proposal setting the terms of reference for the review programme in 2016–2017. Neither document had previously been in the public domain. Subsequent email communication with three of the participants during 2020–21, and one zoom follow-up interview with one of the interviewees, helped to clarify some issues. Interviews with other stakeholders (not analysed here) provided further background understanding.

To all the data, I applied what has been called ‘conventional qualitative content analysis’ (Hsieh and Shannon 2005) in order to identify themes. These themes related to what national actors said about the order of and explanations for events, and how these correlated with what had been included in the relevant documents. I was particularly interested in understanding change over time – the ways in which successive OECD reports differed from each other, as well as the relationship between global/national interaction and changes in Greek legislation and policy emphases. In many respects, I draw on the ethnographic practice of what Burawoy (2003) calls an archaeological revisit, digging into the past, deliberately reconstructing history in order to identify and then track the processes connecting past and present (see also Vaughan 2004).

In order to capture the shifts and fluctuations of negotiations, the analysis presented below is organised chronologically. There are four sections.

Unpicking the 2015 memorandum

In the early autumn of 2015, the Greek government took a decision to approach the OECD to discuss the scope and thematic focus of the organisation’s forthcoming update visit in 2016. It was not certain that this approach would be productive. The OECD had enjoyed a symbiotic relationship with the previous government and had helped develop what some interviewees described as its ‘disastrous policies’ (Interviewee 1, MoE). From their perspective, the report (OECD 2011) was ‘exceptionally harsh’ and impossible to implement (Interviewee 1, IEP). Above all, there were problems with its promotion of school autonomy – the ‘most dangerous project’ – which would set the system off along the road to privatisation: ‘as a government we were against it’ (Interviewee 1, MoE).

On the other hand, parts of the ideational world of the OECD were acceptable to the government. As a key policy actor stressed, having a strategy to ‘steer the negotiations towards future desirable outcomes which would firmly position Greece as a European Union nation state at the end of the programme was essential’ (Interviewee 1, MoE). From this point of view, even the 2011 report had its ‘good and bad elements’ (Interviewee 1, IEP). The Greek education system was ‘too centralised’, especially around

matters related to curriculum and pedagogy (Interviewee 4, MoE); the OECD was not wrong in seeing evaluation as an important element of whole school development and this was widely misunderstood in Greece:

'In Greece there is a pathogenic attitude towards evaluation. It is felt to endanger the professional autonomy of teachers. The recent history has not helped with this. But we were interested in developing participatory forms of evaluation' (Interviewee 1, IEP).

Interviewees also recognised that recommendations made by the organisation to national states were adaptable to a country's needs and policy priorities; the OECD 'knew' its proposals were only likely to acquire 'legitimacy if they were close to government's interests' (Interviewee 3, IEP). Accordingly, the Greek side decided to seek to 'reorient' the recommendations of the 2011 OECD review in 'more fruitful directions' (Interviewee 1, MoE), thereby resetting the agenda with the Institutions. This involved engaging with the OECD to produce 'in effect a new national policy review with a new set of recommendations' (*ibid.*).

Their approach involved navigating a way through the OECD's complex organisational culture (Lingard and Sellar 2016). 'Pulling out all the stops' (Interviewee 1, MoE), Greece aimed to identify people who worked for the organisation and whose views could be described 'as tending towards the social democratic rather than the neoliberal' (*ibid.*). Networking activities such as informal telephone conversations and a visit to the OECD offices in Paris in January 2016 helped in this respect. The organisation turned out to be open to an invitation from Greece, 'as one of its member states', to 'explore the possibility of revisiting' aspects of the 2011 report' (Interviewee 1, MoE). This was a significant move which opened up new possibilities for discussion.

In its contact with the OECD Greece began by questioning the data and analysis presented in the 2011 report. Drawing on data from other organisations (UNESCO, UNICEF and the European Parliament) national actors argued that data on school numbers, teachers' workload and salary costs related to a pre-crisis society very different from that of 2015 (memo to the EC). The report not only 'lacked credibility' but it also presented 'serious weaknesses' because it had not displayed an in-depth knowledge of the distinctiveness of the Greek education system (Interviewee 2, MoE). At the same time, it was made clear that there were ideas in the report that were 'of interest to the Greek side' (memo to the EC). At the January meeting, Greece managed to reach agreement with the OECD to structure the review agenda around six areas of policy reform (budgets, institutional autonomy; whole-day school; training for school leadership; research and monitoring, OECD 2017, 5). These areas were now seen as 'cracks of light' (Interviewee 1, MoE), inflected differently from 2011 as ideas which did not entail commitment to NPM reforms. In these cracks, the Greek side hoped to open up discussions with the OECD and the Institutions beyond the terms of 2011 and the conditionalities of 2015, aiming to lever open EU funds.

The two parties agreed the agenda, the procedure and the make-up of the review teams. They also agreed that in contrast with the update required by the MoU this would be a process that concluded with policy options in a 'preliminary assessment report' (OECD 2017) and not recommendations that Greece would have to implement within the framework of the memorandum (Interviewee 3, MoE). The OECD

recognised the ‘controversy’ generated by the 2011 report and stressed that work on the new review would be based on ‘consensual process’ (draft OECD work proposal 29 February 2016: 4). The review was financed by the Greek Government.

Agreeing the scope of the update visit with the institutions and the role of the preliminary assessment review

The terms agreed between Greece and the OECD had now to be negotiated with the Institutions. In their initial dealings with the EC (as Head of the Institutions) on 3 February 2016, the Greek side were able to reach a tentative agreement ‘to review the status of the six points in some depth by June 2017’ and to prepare a new ‘country review during this time’ (memo to the EC). The Commission gave its approval for the new country review but added a seventh point to the OECD work proposal to stress that policy conditionalities still applied:

Furthermore, issues related to the scope for modernisation of the education system, inter alia, through rationalisation of the system will be discussed as an integral part of the analysis of some of the [6] points above. (OECD draft work proposal).

Moreover, in contrast to the normal process of country reviews, where the interlocutors were the OECD and the national state, the EC added itself to the discussions as an active observer (OECD 2017, 2018). Interviewees suggested that the EC’s purpose was to ensure that discussions were framed by conditionality (Interviewee 3, MoE). Although the IO maintained the overall responsibility for the writing of the report, drafts of the report were sent for comments to both Greece and the EC teams (OECD draft work proposal).

Authorised, thus, by the EC, the OECD update visit which had already got underway in February became in April 2016 a preliminary assessment review. For the Greek side this was another significant step: ‘the May deadline for producing plans on further rationalisation had been suspended’ (Interviewee 1, MoE). However, other important objectives identified by Greece had not been realised. Notably, the EC did not accept that sufficient progress had been made to justify the release of funds to enable legislation on permanent teacher appointments:

But they [EC] would be unhelpful. They could not tell us not to legislate. They would say they were willing to discuss our requests for proceeding with teacher appointments *if we showed progress with reforms* (Interviewee 3, IEP).

The IO’s visit (15–19 February) and subsequent exchange of data and information focused on the school autonomy with accountability agenda:

With the OECD team there were discussions and exchange of ideas. They would ask questions, or clarifications, they would make suggestions and invite arguments/positioning. (Interviewee 3, IEP)

This method of ‘problematization’ (Browes and Verger 2020) included invitations to consider ‘best practices’ – a key aspect of the benchmarking mechanism. Exemplars of ‘best practice’ were often countries that had made significant changes to their systems following a recent review. They were states from which Greece could learn the most: ‘the boxes in the report’ as one policy actor described them (Interviewee 2, IEP).

Problematising also involved invitations to the Greek side to reflect on their system, make their own suggestions for change and assume ownership of the process. The Greek side saw this as an opportunity to steer discussion in new directions, away from the emphases of the 2011 report. Teacher evaluation was a case in point: here Greece appealed to different trends in educational research and practice, to move away from the idea of individual teacher evaluation towards a more collective approach:

Before 2015 the ‘best practices’ were those found in the English/American education systems. Since 2015 you could suggest alternative practices those of Finland for example. It was possible to weaken the tough line adopted by the OECD in the 2011 report by drawing on the Finnish examples. (Interviewee 2, IEP).

In this context, Greece and the OECD were able to find common ground. The IOs position was evolving, in the opinion of one Interviewee:

It had moved away from the kind of individual evaluation favoured in the 2011 report, which was closer to the English model. Their model was closer to the Scottish one, I would say (Interviewee 3, IEP).

In parallel with this shift, proposals for new legislation on whole-school evaluation were being prepared by the Greek Government ‘to some extent to meet EC demands’ (ibid.). They included appraisal of prospective school leaders and other local and national administrators against specific standards – a key aspect of the OECD’s accountability framework. This meant that Greek policy had also shifted, with the effect that:

The OECD were very enthusiastic about the Government’s policies to build a culture of evaluation (Interviewee 4, MoE).

Although the possibilities of Greek ownership of reform increased with this response, in other respects the outcomes of the review maintained the OECD’s previous positions. Though the scale of the social crisis was recognised, and the education system was presented, with a measure of approval, as ‘recovering’ (OECD 2017, 17) Greece continued to be ‘named and shamed’ (Marcussen 2004) as an ‘outlier’ (OECD 2017, 26) among OECD education systems in its low level of adaptation to school autonomy with accountability reforms. Without Greek commitment to such modernisation, the OECD could not endorse the government’s proposal to solve the problems created by the high number of adjunct teachers by making permanent teacher appointments.

Amending conditionalities: the production of the 2018 RNEP

During 2016–2017 external involvement in national policymaking continued to generate controversy. Teacher mobilisations and general strikes against cuts and the curtailing of labour rights continued, though in a less intense form than in the pre-2015 period. Neither Greek teacher union (primary and secondary) accepted invitations to meet with the; both were critical of Government strategy. The contested nature of the IOs agenda was reflected in the media and Parliament where for both the right and the left the OECD was the vehicle of the MoU package. ‘Education policy caught in the OECD bear trap’ wrote a commentator in the left daily *Efsyn* (19.09.2017); on the

right there were frequent calls on the Government to implement OECD recommendations: ‘Do what the OECD is telling you to do’ said the leader of the Opposition at Parliament (01.08.2017).

The preliminary assessment report was published in February 2017. It lessened the pressure of the MoU and established a revised agenda for policy evaluation, though without satisfying the concerns of the Institutions. In the second phase of the review process, the influence of the EC – which financed the new RNEP (OECD 2018) – was stronger and the constraints of conditionality were more evident. Interviewees noted that Greece was the third, subaltern party in the contract, a party which ‘simply had to agree to participate’ (Interviewee 3, IEP). The OECD’s expertise was now more clearly being used to carry out the Institutions’ agenda. The review included two visits by a new OECD team in May/June and September 2017 followed by a one-day meeting in December at the request of the Greek Government. The review team included previous and new members, outside experts and OECD officials. Interviewees described some of the new members as being ‘closer to the neoliberal’ (Interviewee 2, MoE) and noted that Greece did not have much say in the constitution of the team. Indeed, the new Head of the OECD team ‘was simply announced’ (Interviewee 3, IEP) to Greece. Alongside a change in the make-up of the OECD team the Greek side noted other differences:

‘The politics of memoranda demanded that the OECD adopt a harsher line. You could sense the difference in its attitude’ (Interviewee 2, IEP).

The review process did not always proceed smoothly. Although both sides were committed to policies which promoted equity and social justice, the IO’s agenda of framing these around school autonomy with accountability created friction with the Greek commitment to central governance and uniformity of provision. It was difficult to agree on a common agenda. As one interviewee noted: ‘some members of the team [OECD] had arrived with preconceived ideas: that our centralised system was expensive, and they wanted to abolish tenure, create school clusters and public–private partnerships. Although they tried to engage with our points of view there was not always much room for changing minds’ (Interviewee 4, MoE). Work was made more complex still because the EC was determined that questions of teacher evaluation, governance, rationalisation and workload should continue to frame the agenda. These were things which the OECD had been assigned to review and which the Greek side ‘could not completely shift’ (Interviewee 3, MoE).

In parts of the review, especially around ‘rationalisation’ and school autonomy, the OECD’s ‘best practice’ methodology created tension. Although the IO had visited small schools and ‘were supportive of retaining the school network’ (Interviewee 2, IEP) the ‘reference societies’ (Browes and Verger 2020, 13) identified as part of the usual process of country review seemed to the Greek side to offer no useful lessons on rationalisation:

They used Portugal as an example of a country which created large school clusters. But Portugal had identified the improvement of their school network as a review focus because of their problem with student retention from small schools. We do not have this problem. On the contrary Greece is above the EU average in relation to school retention (Interviewee 3, IEP).

For the OECD, this was an equity issue- larger clusters offered better learning opportunities- but the impression among several national actors was that these reference societies had been selected to facilitate particular outcomes, to exercise pressure on the Greek team to consider the further rationalisation of the school network and to adopt a school funding formula. In these and other areas the Greek side counterposed to the ‘culture-neutral’ approach of globalised policy-making (Lingard and Sellar 2016) the presentation of national realities, both political and geographical:

‘There are geographical areas which are isolated and very poor. Other areas are politically sensitive because of their close proximity to countries who are difficult neighbours. We will properly resource schools in such areas with teachers even if the number of students is very small. Because we would want the students and their families to stay on the village or on the island for their education (Interviewee 1, MoE).

Interviewees maintained that it took the Greek side some time to get the frequently changing OECD team to see their point of view about the political and cultural sensitivities surrounding the school network. The OECD would make alternative proposals, for instance: ‘to consider the use of distance learning like in schools in Japan’ (Interviewee 3 IEP). In the view of some of the interviewees this was because the team ‘could not step out from their methodology to accommodate value-laden discussions about national particularities’ (Interviewee 1, MoE). Greece made some progress in its arguments to the point where a compromise was found. The final report acknowledged the Government’s view that decisions of this kind should be made on broader grounds: ‘communities had to be allowed to thrive’ even if this led to higher costs and staffing difficulties. Nevertheless, the idea of creating large school clusters with greater financial autonomy was not relinquished but rather placed on a new timeline (OECD 2018, 92).

Value-orientated, historically based disagreements were at their strongest around school governance, where the views of EC observers ‘made meetings extremely difficult’ (Interviewee 1, IEP). In the Greek view, a recurrent tactic of EC representatives during meetings was to ‘push them as far as possible to test their limits though not to the point of breaking off discussions or elevating them to a higher [political] level’ (Interviewee 2 MoE). In the words of one interviewee: ‘With the OECD you discuss, with the EC you negotiate’ (Interviewee 2, IEP). Interviewees stressed that they tried to direct the agenda towards pedagogical autonomy, professional development for school leaders, and a decentralisation policy which would enable links between schools and local communities. For the IO and in this context, the EC this was a necessary but not a sufficient move and they pushed for further reform:

‘(Another) area which led to direct collision- was the issue of school autonomy, allowing head teachers to employ their own staff, they [the OECD and the EC] insisted on this until our last meeting using Ireland and to a less extent Finland as models. Their rationale was that allowing headteachers to employ their own staff will increase competition among schools, parents will reward the good school’ (Interviewee 1, IEP).

For Greece, giving heads the power to hire and fire was not possible in a state where, constitutionally, teachers had the status of civil servants with tenure: ‘In the end, we said, this is as far as we are prepared to go’ (Interviewee 1, IEP) This disagreement was reflected

in the final text: the system should indeed be reconstructed on a basis of autonomy, but this should occur in stages, placing the immediate emphasis on the development of pedagogical autonomy and on engaging key stakeholders in this (OECD 2018, 166).

In the context of accountability, teacher evaluation was revisited. Earlier accord between the parties on building a 'culture of evaluation' at school level had not settled the issue. Under the active surveillance of the EC this area remained a recurrent and contested topic:

'They never stopped [the EC]. Until the last meeting with them they insisted on us bringing back the evaluation of teachers' work (Interviewee 2, MoE).

The EC threatened to withhold funding for adjunct teachers' salaries if Greece did not agree to introduce the evaluation of teachers' work in a framework of NPM (Interviewee 1, IEP). At this point, however, the views of the EC and the OECD diverged. Interviewees emphasised that the OECD team did not want to replicate the controversies of 2011 (Interviewee 2, IEP) and chose not to align itself with the EC's position. The implementation of individual evaluation was postponed to an unspecified later stage. The prospect of an evaluation process that would lead to 'redundancies and other disasters' (Interviewee 3, IEP), was averted.

Arguments around funding and the alleged underfinancing of education continued. All interviewees agreed that information about government spending was not always very coherent: 'we were very aware that this was a problem. Education budgets are handled across different ministries and our systems are not very good at pulling this information together' (Interviewee 4, MoE). Questions of the reliability of information were elevated into political problems of trust. Greece's reputation as a country which lacked transparency skewed the review process. Progress in talks on the draft report was sometimes slowed for several weeks because:

'The OECD team was reluctant to accept the changes we had suggested and they would amend two lines at a time. They would not accept the data that we had supplied them with. We called an extra meeting with the OECD in December 2017. I provided them with many sets of data and I tried to build trust. I said to them: "Tell me what you need, and I will send you the data within two days and I kept my promise. And they responded positively. This is how the final report was written' (Interviewee 3, MoE).

On school governance, evaluation and rationalization, the three parties were able to reach what were at least provisional resolutions. There remained an outstanding issue. The government's request for a 'return to unhindered employment of permanent teachers' (OECD 2018, 69) remained outside the OECD's parameters. The IO's solution that substitute teachers should be appointed on a five-year contract was rejected by Greece, which was aware of the immediate political consequences of policy solutions like these (Interviewee 4 MoE). The discussion coincided with a new period of teacher mobilisation around precisely the issues at stake. Under this pressure, the process of evidence-based policy deliberation was set aside and networking mechanisms were activated. The five-year recommendation was turned around by an intervention at the political level in a conversation between the Minister and high OECD officials (Interviewee 3, MoE). In the final report, the recommendation for five-year contracts became a longer-term option. The report accepted that 'a complete freeze of new permanent employment in school units

is harmful to education’ (OECD 2018, 69). It no longer ruled out government action though it warned that ‘... a simple return to pre-crisis approaches is a policy choice that may have negative consequences and would require in-depth discussion’ (ibid.).

The outcome

Education for a Bright Future in Greece (OECD 2018) was launched at the Ministry of Education on 19 April 2018.³ For the Greek side, it had an immediate advantage. Its acceptance of the case for permanent teacher appointments ‘even in this diluted, weak form’ (Interviewee 1, MoE) helped to unlock European funding for 15,000 permanent teacher appointments over three years (2019–2022). To this extent, the report served to depoliticise public sector tenure and remove it from a nexus of conditionality. In other respects, it was a more ambivalent document, like the ‘utterances of the Delphic oracle’ to which one national actor compared it (Interviewee 3, MoE). In one sense, the report interrupted the process of structural reform; it modified or delayed policies of teacher evaluation, school governance and rationalisation. In another, it continued the policy themes which had been established in 2011; NPM remained a crucial reference point. Though the report had become ‘more relaxed in relation to certain aspects ... more flexible’ (Interviewee 2, IEP), ‘the essence of [its] framework does not change’ (Interviewee 3, MoE).

The launch event was a sober rather than celebratory occasion. There remained clear differences between Greece and the OECD, delineated in the presentations of Minister of Education Kostas Gavroglu and OECD Chief of Staff Gabriela Ramos. The Minister positioned the OECD as an expert knowledge producer which had provided Greece with a repertoire of ideas, an opportunity to reflect on its educational record and adopt policies for change. The report itself was a text that Greece ‘can work with’; a better one than that embraced by PASOK in 2011; it was based on ‘stronger data’ and was more balanced in its conclusions about the state of the Greek education system. However, in other ways, the Minister tried to set limits to the future impact of the report’s recommendations on national policy. OECD policy was overly ‘technocratic’ and not sufficiently attentive to ‘social contexts and education traditions’; ‘best practice’, therefore, was a contested term. Gabriela Ramos avoided direct confrontation with the Minister. Illustrating the point made by Browes and Verger (2020) that national reports were consistent in their direction and crucial to the OECD’s efforts to raise its profile and influence, her focus was on the OECD’s longer-term agenda; there was no mention of the organisation’s entanglement in conditionality and the MoU. ‘Building on international best practices,’ she indicated, ‘reforms should consider more autonomy for schools and school principals, a solid accountability framework, and a culture based on evaluation’ (OECD 2018).

Unlike Sweden (Grek 2017) or the Netherlands (Browes and Verger 2020) the much sought national consensus had not been achieved and the ambivalences of the report were reflected in the different readings that were made of it. The published report was scrutinised by many of the mainstream Greek newspapers as well as sector organisations. The centre-right daily *Kathimerini* highlighted the OECD’s preferences for further reform,

as did the centre-left *Ta NEA*. The headline for the SYRIZA-supporting *Avgi* focused on the report's acceptance that a freeze on permanent appointments would be disastrous for education. Another paper of the Left, *Efsyn*, described the report as 'tough neoliberal'.

SYRIZA lost the 2019 general election and a centre-right New Democracy government was formed. Although Greece left the SAP in 2018, it continued to remain under 'enhanced surveillance', monitored by the European Stability Mechanism (European Stability Mechanism 2021). The country's progress with respect to policy commitments made at the Eurogroup in June 2018 is monitored every four months. The OECD continues to be involved in its surveillance. Starting during the pandemic in 2020, the new Government has been keen to implement policies aligned with many of the OECD's recommendations of 2018 and to accelerate the implementation of policies which SYRIZA had tried to slowdown and qualify. SYRIZA's strategy of delay has been set aside. Protests and strikes are continuing.

Conclusion

The article has explored the negotiation of conditionalities through policy review. Through a historical case study, the research has engaged with the complexities of a national history and the intersections between that history and a system of global governance. These intersections preceded the period of conditionality, but in that period took on a new form.

Conflicting roles and purposes were noted. The OECD aimed to introduce school autonomy and accountability instruments, transferring to the Greek case what Browes and Verger (2020:15) call 'normative notions of how educational systems should be organized' in the face of resistance. The organisation had developed ways of working with national governments based on principles of peer-review and consensus-seeking. In Greece, these were not entirely set aside; they were located, however, in a process where the negotiation of reform was underpinned by potential penalties for national non-compliance.

The positions taken by the Greek government, the second main actor, during 2015–2019 reflected post-2008 opposition to austerity and neo-liberalisation and were at odds with the demands of the Institutions for structural reform. These demands arose from the weak position of Greece within the European economic and political order. In countries with strong economies, governments are able to select strategically from OECD recommendations; educational systems perceived to be in crisis do not have such latitude and can experience 'patronising' treatment (Echávarri and Peraza 2017; Browes and Verger 2020).

Greek perspectives were divided too. Its representatives shared parts of the OECD's ideational world. At the same time, while it had committed to work on a consensual basis on the loan programme, the government was also concerned to maintain its legitimacy by defending what it saw as historical principles of Greek education. From this latter perspective, the proposals of the OECD were only partially a display of authoritative knowledge; they were also a value-laden and ideologically driven programme.

Managing conditionality thus involved complex negotiations around agenda-setting. Lack of trust between the Institutions and the Greek Government meant that developing domestic ownership of the reform agenda was not an easy task; a context of austerity and

clashing political perspectives made it harder still. Conditionality provided not just the context of discussions but also shaped their form. As noted in other studies (e.g. Theodoropoulou 2018) the external actors intervened intrusively and in detail in the making of national policy, with the EC as the Head of Institutions ensuring that the terms of the third MoU were a consistent reference point. 'Review' was thus not only a source of moral pressure but a challenge to national sovereignty.

However, positions evolved. Greece was able to utilise the OECD's expertise to delay implementation of the terms of the MoU. In the OECD's reviews the effects of austerity were presented in the form of neutralised indicators, rather than ideologically laden claims: expertise became a means of depoliticising educational agendas and creating a space for negotiation beyond the limits of the MoU. The review process was arduous and never free from the pressures of conditionality. But the OECD, with its history of consensus-based policy development, recognised the constraints on the Greek government and responded to them. Having tasked the OECD with the work of reframing Greek education policy, the EC was willing to accept its conclusions.

Thus, the reform process should not be understood in terms of a growing symbiosis of perspectives, nor was it simply the imposition of a global agenda on an unwilling national state. The tangled encounter of 2015–18 led to a 'settlement' which was uneven, unstable and tactically motivated. All sides – Greece, OECD, EU – sought to recognise partial convergence and to accommodate differences, but did not reach a principled agreement. Greece to a certain extent adapted to the 'ideational influence' of the OECD (e.g. on the desirability of school evaluation and on improving the OECD 2011) and engaged in socialisation processes. However Greece did not entirely absorb the OECD's policy norms. Within the parameter of conditionality the OECD review teams were willing to make concessions to national positions, not least because of the need for domestic ownership of the reform package. The organisation's flexibility helped to 'unstick' education reform from the controversies of the 2011 report and provided a space for the agency of the Greek government as it worked to modify the conditionalities of the Third Memorandum. The national state had the capacity, to elaborate and advance its own policy agenda. Though it could not alter their overall framework, it was able to modify and delay the implementation of reforms.

Greece was exceptional in the depth of its crisis, the severity of structural adjustment, the electoral success of the radical left and the abrasiveness of its relations with the Institutions and with dominant European states. Yet despite its status as an 'extreme case' the Greek experience in education illuminates both the scope for, and the limits to, resistance on the part of national governments in the face of pressure for reform coming from global agencies. It underlines the importance of bringing into the framework of policy analysis a detailed treatment of inequalities between states and of conflicts within them, and of the relationship between the course of policy development and external influences upon it, including political mobilisations and social movements. Reflecting on the Greek experience may help us understand policy-making at a time when tensions between the national and the global dimensions of policy-making are taking on a new prominence.

Notes

1. IEP is the main national agency that provides support to the Minister of Education.
2. Goldsmiths, REISC, no: 1497
3. <https://www.minedu.gov.gr/news/34,090-18-04-18-parousiasi-tis-ekthesis-tou-oosa-ekpaidefsi-gia-ena-lampro-mellon-stin-ellada-3> (in Greek)

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