

NEPC Review: Spark & Sustain: How All the World's School Systems Can Improve Learning at Scale (McKinsey & Company, February 2024)



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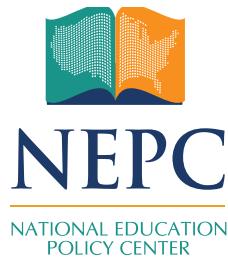
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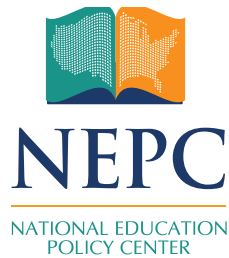
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Summary

In February 2024, McKinsey & Company released a new global report on education entitled *Spark & Sustain: How All the World's School Systems Can Improve Learning at Scale*. The report aims to provide a toolbox for policymakers and other stakeholders on the policy reforms and governance strategies that can promote significant and sustained improvement in students' learning outcomes. The report notes interventions that it identifies as effective in areas such as teachers' policies and pedagogical materials and practices. It also highlights the need to set the appropriate conditions for advancing a reform agenda that the authors contend will promote gains in learning outcomes. However, significant analytical and methodological shortcomings raise doubts about the report's findings and conclusions. For instance, not considering counterfactual cases (i.e., countries that do not experience an improvement) limits the report's capacity to establish causal links between the strategies identified and the improvement of learning outcomes. The report's usefulness is further weakened by the lack of specificity and universal scope of its recommendations and the superficial analysis of factors shaping implementation processes. Moreover, the narrow focus on learning outcomes does not account for the diverse priorities and complex challenges most education systems face.



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I. Introduction

In the past two decades, improving student learning outcomes has gained significant relevance and centrality in international debates and education agendas.¹ Reflecting this trend, the last McKinsey & Company global education report,² *Spark & Sustain: How All the World’s School Systems Can Improve Learning at Scale*, focuses on policies and strategies that can promote continuous improvement of students’ learning outcomes. The report asserts that the increase in access to basic education experienced by most education systems worldwide since 2000 has not translated into learning gains for most children. Specifically, the report estimates that 7 in 10 students in low- and middle-income countries are in “learning poverty,” defined as the inability to read or understand a basic text by the age of 10, a situation exacerbated by the COVID-19 pandemic school closures.

The report aims to extract policy lessons from those education systems “beating the odds”—those that showed sustained improvement in students’ learning outcomes in the decade before the COVID-19 outbreak. With this aim, complemented by a diversity of inquiring approaches and methods, the report conducts a series of case studies in countries from different contexts and starting points regarding learning outcomes and education development.

The main contribution of the report consists of a series of policy recommendations in diverse domains—from teachers’ policies to educational management data—and effective policy implementation approaches to guarantee the improvement of students’ learning outcomes.

II. Findings and Conclusions of the Report

Based on the literature review and the case studies conducted, the report concludes that those national, regional, or local education systems that have improved students' learning outcomes over the past decade have adopted initiatives and implemented governance strategies in four main areas:

1. Giving high priority to classroom-level interventions designed to enhance both teacher and instructional quality. The report points to teacher-oriented policies that focus on recruiting highly qualified educators, providing effective professional development, and retaining educators in the profession. It lauds efforts to improve pedagogical materials and classroom instruction by developing evidence-based curriculums and adopting "high-quality instructional materials." In addition, it emphasizes promoting student well-being as a means to facilitate effective learning. This includes emphasis on creating a positive school climate and offering psychological support as key aspects of improving student emotional health.
2. Building sustainable coalitions of change. The report underscores this as a necessary condition for the effective and quick implementation and promotion of learning improvement. The report considers that identifying few, but specific, priorities and ensuring the consensus of key educational stakeholders around them can contribute to increasing support and making real progress. This approach also involves promoting distributive leadership and strengthening institutions beyond the Ministry of Education, as well as engaging families and educators in the process of change, which is essential to advance a reform agenda.
3. Strengthening the implementation structures as a crucial governance requirement for ensuring change scalability and improving learning outcomes. Recommendations focus on adopting concrete action plans, forming effective implementation teams, and establishing clear accountability standards.
4. Adopting data-driven improvement strategies, which involves not only monitoring students' learning outcomes but also other related dimensions. According to the report, better data should allow education authorities to scale and extend those interventions that demonstrate their effectiveness, identify potential challenges or areas of improvement, and promote evidence-based innovation.

III. The Report's Rationale for Its Findings and Conclusions

The report's rationale and methodological framework are based on four independent yet interrelated methods: 1) a review of academic evidence from 400 publications, 2) interviews with 200 experts, 3) analysis of two international databases (Harmonized Learning Outcomes³ and World Education Reform⁴ Databases) and a proprietary survey conducted with various stakeholders in different regions of the world, alongside 14 case studies. Case studies were selected from two groups of education systems. The first group includes nations that

have experienced a relevant improvement in the past 10 years on large-scale assessments. The second group includes education systems that show significant improvement, but not sustained over a full decade. Based on this methodological and analytical strategy, the report aims to identify and synthesize the interventions and strategies that enable education systems to achieve significant and sustained improvements in learning outcomes.

IV. The Report's Use of Research Literature

The report examined over 400 publications spanning 20 years, offering a global perspective on the impact of a broad range of K-12 educational transformation processes. The report prioritizes “impact studies with experimental or quasi-experimental methodological approaches,” focusing primarily on learning outcomes improvement as the main dependent variable. While the full list of reviewed literature is not fully accessible, a selection is available in the references list. From this list, the review is comprehensive regarding themes and the disciplinary focus of the journals covered. It also maintains a balance in publication types, with about half of the sources being peer-reviewed journal articles, and the rest a mix of books, reports, and working papers.

Given the central role of the literature reviewed in supporting the report's key arguments, more details about the literature search process would have been beneficial. Including the search procedure and criteria in the methodological appendix would have enhanced the transparency and replicability of the study.

The report covers many diverse policy areas, including non-cognitive skills, pedagogy, the role of the private sector, technology, and accountability in education. Therefore, it is beyond the scope of our review to discuss each from the perspective of literature coverage and gaps. Nevertheless, given the report's emphasis on administrative capacity and political economy factors in understanding reform success, it is surprising that literature addressing these factors is virtually absent. The significance attributed to reform and implementation capacity should not rely solely on tacit knowledge and intuition, but rather on the extensive body of evidence produced by social scientists in this field.

Finally, a notable limitation of the reviewed literature is its narrow emphasis on enhancing learning outcomes, primarily understood as cognitive or academic skills. This approach overlooks other dimensions of educational improvement outlined in the report,⁵ such as family and teacher satisfaction and student well-being.

V. Review of the Report's Methods

The report is supported by significant data collection efforts, incorporating a literature review, expert interviews across selected countries, a global survey, and secondary data analysis. However, as we highlight in this section, there are limitations in the execution, explanation, and integration of these methods within the report.⁶

Particularly, with respect to the *expert interviews*, there is limited transparency regarding selection criteria, methods used, and the diversity of interviewees across different countries. From a comparative analysis perspective, the report does not specify if the same stakeholder profiles were approached in all the countries covered. A predominance of reform proponents in the sample may lead to biased interpretations, favoring a triumphalist perspective of successful reforms. For instance, the report offers an uncritical perspective on educational reforms in Peru—which were short-lived and with limited impact; or on the reforms in Washington, DC—which were highly controversial and contested, failing to generate broad coalition support.⁷ This selection bias likely influenced the analysis, as experts’ vested interests could have skewed their portrayal of reform initiatives as successful.

The *global survey* collected “422 responses from 27 countries across Africa, Asia and Pacific, Europe, Latin America, the Middle East, and North America.” Given that the survey targets officials and decision-makers, the sample size might appear sufficient. However, the respondents are unevenly distributed across the six regions, with only 7% from Africa, and data on country coverage is not disclosed. This casts doubts on the validity of the survey since each country and region should have an adequately proportionate number of respondents to reflect its specific reform context. Likewise, a small number of respondents from a highly populated or federal country might not sufficiently represent certain geographic perspectives. As education reforms are context-sensitive, this lack of coverage can lead to a skewed identification of key drivers of change relevant to particular educational settings. Finally, the use of convenience sampling entails a significant risk of bias in the country data obtained, potentially underrepresenting specific viewpoints.

Beyond each of the specific methods used, a broader critique of the methodological strategy lies in the inadequate integration of these methods into the cohesive mixed-methods approach the report claims to be implementing. A truly cohesive approach requires moving beyond the reliance on and triangulation of multiple methods. The limited integration of disparate empirical approaches (such as a bottom-up strategy that identifies successful countries before analyzing their reform implementation, alongside a global literature review and survey lacking the same territorial focus) leads to mismatched findings and results in a fragmented and occasionally inconsistent narrative.

VI. Review of the Validity of the Findings and Conclusions

The findings and conclusions of the report are based on identifying the strategies exhibited by improving countries, assumed to be conducive to the improvement of learning outcomes across contexts—namely: anchoring in the evidence, building durable coalitions for change, creating capacity to deliver at scale, and driving and adapting with data. However, the report does not clearly describe its analytical approach and how different sources have been combined, making it challenging to assess the validity of the causal claims. Specifically, the following shortcomings make it difficult to discard alternative explanations and gauge the transformative potential of the different strategies:

1. The scope of the analysis is largely confined to those education systems identified as successful in improving learning levels. The report does not delve into the strategies employed by less successful countries, making it uncertain whether these approaches are truly exclusive to top improvers. Without a comparison group or any other attempt at counterfactual reasoning, it is impossible to attribute the observed changes to the four groups of strategies portrayed as crucial for progress.
2. The report predominantly relies on the perceptions of experts and other stakeholders to identify reinforcing strategies. The absence of a more systematic approach challenges the report's ability to determine the causal impact of the levers, or to ascertain whether top improvers share other common features. This leaves open the possibility that the observed changes are explained by other variables.
3. The empirical analysis of the processes connecting these strategies to the observed learning gains is limited and insufficient. While the report proposes some explanations for the potential mechanisms underpinning these connections, it ultimately leaves the sequence of events and processes (i.e., the chain of causality) connecting such strategies with improvement patterns black-boxed.

Taken together, these limitations prevent establishing a clear causal connection between the identified reinforcing strategies and improvement trends. While such strategies are plausible intuitions, it remains difficult to ascertain whether, or to what extent, they are the key factors at the root of the improvement trajectories, or if other, more consequential elements are at play.

Adding to the limited robustness of the conclusions and recommendations, their relevance and actionability are similarly restricted. Hence, the report fails to acknowledge the macro-level factors shaping policy implementation. Education policymaking processes are approached as susceptible to being fine-tuned at will. However, several of the recommended strategies require major transformations in terms of state capacity, political culture, or the balance of power among different interest groups—factors increasingly recognized as crucially mediating education improvement efforts.⁸ These are elements beyond the remit of education stakeholders and often subject to institutional inertia, limiting the report's potential to contribute to educational change. Moreover, the actionability of several of the recommended strategies is also limited because of the universal scope of the provided guidance, which is expected to be relevant in any context. Accordingly, recommendations are necessarily generic, and their associated policy options are scarcely discussed, making them inadequate to inform specific policy actions.

Finally, the relevance of the report's recommendations is further diminished by the narrow focus on learning outcomes improvement, which might reduce the relevance of the policy recommendations among domestic circles. This is particularly the case in low- and middle-income countries featuring other policy priorities—including the expansion of technical and vocational education or the completion of secondary education⁹. Similarly, in high-income contexts, debates on educational quality do not necessarily revolve around aggregate achievement levels but on their distribution, with an increasing focus on equity and inclusion challenges.¹⁰ Given this broader spectrum of policy priorities, the report's focus on

learning outcomes might provide an excessively narrow basis to guide policy action.

VII. Usefulness of the Report for Guidance of Policy and Practice

The report lays a useful foundation by drawing attention to policy implementation issues that are often overlooked or discussed from a deficit lens in educational research and other policy reports. It also identifies best practices in both Global North and Global South contexts, thus establishing the basis for cross-learning opportunities. However, the report's usefulness for decision-makers and practitioners is critically undermined by the lack of transparency and clarity in its methods, and the limited robustness of its causal claims. Consequently, the recommendations provided by the report appear to be insufficiently substantiated. The usefulness of the report is further diminished by the limited actionability of several recommendations and the neglect of macro-level factors shaping implementation processes. Additionally, its narrow focus on learning outcomes might fail to resonate with the multiple policy priorities and challenges currently faced by education systems.

Notes and References

- 1 On the emerging consensus around the priority of foundational learning, see: Crawford, L. (2024). Feasibility first: Expanding access before fixing learning. *International Journal of Educational Development*, 104, 102949. The growing centrality of the improvement of learning outcomes within the international community can be observed in a series of flagship publications and programmatic documents published by key donors and development organizations—see for instance:

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- 6 See comments on the literature review approach in section IV of this report.
- 7 Balarin, M. & Saavedra, M. (2021, August). *The political economy of education reforms in Peru*. Lima: GRADE. Retrieved May 12, 2024, from <https://riseprogramme.org/sites/default/files/inline-files/The%20Political%20Economy%20of%20Education%20Reforms%20in%20Peru%201995-2020.pdf>

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