Financial Autonomy of Schools in Kazakhstan: International Comparison and a National Perspective

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The European Conference on Education 2021
Official Conference Proceedings

Abstract
This paper has relevance for any nation seeking to reform its model of funding through decentralization and a neoliberal agenda that permits marketization of public services such as education. It adopts a case-study approach to locate and discuss where Kazakhstan, a country undergoing considerable educational reform, is currently positioned regarding one specific aspect of school autonomy; that of school-level decision-making in terms of budget allocations. The first part of the paper compares Kazakhstan's school principals' fiscal responsibilities to global counterparts. This establishes a starting point to reflect the national situation in 2018. The method of comparison is by secondary data analysis of publicly available data from TALIS 2018 (Teaching and Learning International Survey). The second part of the paper analyses primary data captured through a small online survey to school principals in March 2020. Significantly, this research took place during transition from a norms-based distribution of funds by regional authorities to a direct government-to-school per-capita model of finance. Learning from school principals' in-vivo experiences to capture the successes and barriers to implementation of per-capita funding is not only timely but highly useful as wider roll-out proceeds. Furthermore, exploring the national position in 2018 and the local situation in 2020 will be of use to revisit the national situation in 2024 when implementation of per-capita funding should be complete. Findings show that decentralization has significantly altered school principals' roles and responsibilities revealing an important need for professional development to confidently manage budgets efficiently in order to target and achieve school improvement.

Keywords: Per-capita School Funding, School Autonomy, Kazakhstan, TALIS, School Leadership

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Introduction

The questions of school autonomy, accountability and student performance have been on the agendas of national educational policymakers and the international research agenda since 1980s with the rise of The New Public Management Policy paradigm (Hood, 1991; Lane 2000; Olsen, 2008). This policy paradigm implies that schools need to be given autonomy to manage their operations, and they need to be accountable for their performance results. Devolution of school management decision-making from the central to local governments and to schools has become a global characteristic of educational policies due to dissemination of these approached by international organizations such as Organisation for Education and Cultural Development (OECD) (Verger & Curran, 2014) and the World Bank (Sholderer, 2017). Advancement in the area of school autonomy and accountability is promoted and measured by international education studies conducted by OECD such as *Teaching and Learning International Survey* (TALIS) and the World Bank's assessment scale for benchmarking school autonomy and accountability (SABER) (Arcia et al, 2011).

Kazakhstan stands out as a prime example of policymakers' belief in a neoliberal agenda to develop human capital through improvement and marketization of its education system (Nechayeva & Upabekov, 2016). The drive for Kazakhstan to establish itself as a modern independent nation has led to much policy borrowing and attention on measures of progress such as those offered by OECD and The World Bank (Steiner-Khamsi, Silova & Johnson. 2006). Increasing school autonomy chimes well not only with a neoliberal agenda but also with international opinion that setting budgets locally can better target money towards the areas holding students back (Grubb & Allen, 2011). Hence it is unsurprising that Kazakhstan is introducing per-capita funding for schools (MoESRK 2017). This reform not only allows public schools more freedom in making budget allocation decisions to target school improvement but also facilitates remuneration of private entities offering public education. Kazakhstan, therefore, serves as a worthy case study to typify and illustrate how greater school autonomy may impact on student performance through fashioning the conditions for individual schools to steer their own development and by creating competition between schools. This approach is driven by international comparisons such as the Programme for International Student Assessment [1] (PISA) which examines performances in reading, mathematics and science. In the 2018 version of these measures (PISA 2018), Kazakhstan demonstrated much room for improvement since the resulting level of students across all three domains of assessment were well below the OECD average (OECD 2019a).

Definitions of School Autonomy

The concept of school autonomy has evolved over years (Eurydice, 2007). In 19th century Europe and well into the 20th century, the concept of school autonomy was associated with academic freedom. In 1980s, school autonomy reforms were linked to efforts to strengthen democratic participation that emphasized the need for schools to be more open to their local communities. In 1990s, in addition to the responsiveness of schools to their communities, concerns of efficient management of public funds started dominating the conversation. A solution proposed by New Public Management (NPM) was to introduce private sector principles in the management of public sector. One of the measures taken in this context was the devolution of responsibilities from the central government to local communities. It was expected that decentralizing the decision-making to local communities and schools would

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[1] https://www.oecd.org/pisa/

increase the efficiency of school management and heighten its ability to respond to local circumstances and needs. This philosophy guided the reforms in public sector of countries in Eastern and Central Europe emerging from the previously highly centralized system of public administration (Pollitt, 2011; Silova, 2011).

In the 21st century, the concept of a school as an organization which would benefit from organizational autonomy and the engagement with the local community has become part of the mainstream educational philosophy. School autonomy is defined as "a form of school management in which schools are given decision-making authority over their operations, including the hiring and firing of personnel, and the assessment of teachers and pedagogical practices" (Arcia et al, 2011, p. 2). The concept of School Based Management (SBM) describes the situation where in the result of decentralization, the school makes majority of managerial decisions with participation of parents and the community through school councils (Arcia et al, 2011), known as school boards (pop-soviet) in Kazakhstan.

The results of School Based Management implementation have not been universally successful. Arcia and colleagues (2011, p. 3) quote empirical evidence of SBM failure to achieve significant gains in learning in Latin America, while producing positive results in some European countries. Reasons for different outcomes for school autonomy is one of the subjects examined by researchers world-wide. Sholderer (2017) cites studies which indicate that a range of factors including income inequality, low economic development in a country, lack of accountability mechanisms in a school and a low social capital decreases the benefits of school autonomy. In her on research on the relationship between school autonomy and performance in eight post-Soviet countries, Sholderer (2017) finds that in countries with more interpersonal trust and cooperation school autonomy has a stronger positive effect on school performance than in countries that have lower levels of the mentioned social capital of trust and cooperation.

A comparative study of school autonomy in Europe (Eurydice, 2007) has shown that the level of school autonomy differs from country to country and by the area of the decision-making. For example, a school can enjoy full autonomy in making decisions about allocating day-to-day operations budget but has no authority to decide about investing the funds in developing its physical infrastructure. Also, today in most countries school autonomy is seen as a way to improve the quality of teaching and learning. There is more attention to pedagogic autonomy which seems more closely linked to raising achievement at school (Eurydice, 2007, p. 12). Therefore the umbrella term of school autonomy is not always appropriate and for the purposes of this article our focus is on school fiscal autonomy albeit budget allocation schemes that give bonuses to reward good teaching are clearly related not only to fiscal autonomy but also autonomy in educational content, pedagogic practices and staffing decisions.

Methodology

This article employs Kazakhstan as a case study of decentralization in schools' fiscal management. Kazakhstan is deemed a relevant focus to inform on the topic of reform in the allocation of school budgets since, not only is much wider reform underway, it is a nation with considerable focus on improving students' performances in international measures such as PISA (Bridges 2014). The case study is formed by combining and analyzing two datasets: one comprising secondary data and one comprising primary data. Effectively, the article first describes and analyses the international landscape of school fiscal autonomy. Next, it

presents detail of Kazakhstan's school leaders' attitudes towards managing school budgets in order to effect school improvement.

Details of Secondary (TALIS) Data Used for Analysis

The source of secondary data is Teaching and Learning International Survey (TALIS) as one of the major international instruments for monitoring school autonomy to form a comparative, international perspective. TALIS was first introduced in 2008 by OECD with participation of 24 countries[2]. At that time, TALIS was the 'first international survey to focus on the working conditions of teachers and the learning environment in schools' (OECD, 2009, p. 18). The aim of this OECD-led research was to help countries to review and develop policies that 'foster the conditions for effective schooling' (OECD 2009, p. 18). TALIS was created as an instrument for making meaningful international comparisons of the school environment and factors that improve learning. Importantly, to assure attitudes represent schools as accurately as possible, TALIS includes two separate surveys: one for school principals and one for teachers at each participating school. The sample of schools included in the study needs to be characteristic of the school system in the country. Questions that measure school autonomy were present in all three rounds of TALIS survey of 2008, 2013, and 2018. School autonomy was measured in the dimension of budgeting or financial autonomy, school autonomy for staffing, educational policies, and instructional policies. Kazakhstan's schools participated in TALIS for the first time in 2018.

As a companion piece to TALIS, learning or school performance is measured by Programme for International Student Assessment (PISA) that assesses 15 year-olds' abilities in reading, mathematics and science. To connect these two international comparative studies, OECD coordinates the methodology of TALIS and PISA.

Three sets of TALIS data were used for secondary data analysis; those from 2008, 2013 and 2018. Data were downloaded from the online portals provided by OECD for each year[3][4][5] into three IBM SPSS v26 files. TALIS survey items were examined for consistency across the three datasets with note taken of the countries/administrative regions taking part in each of the three TALIS surveys. Only 13 countries[6] participated in all three administrations of TALIS. The data from these 13 countries were used as indicative of change over the period 2008 to 2018. Item responses for these nations were directed towards a MS Excel spreadsheet in order to collate data and present longitudinal trends. As the most recent data and since Kazakhstan only took part in TALIS 2018, this dataset forms the focus for most of the more detailed analysis of school autonomy measures that follow: once overall international trends have been presented. 48 nations/regional administrative organisations took part in TALIS 2018 so results are presented for these as averages across the OECD dataset through original analysis of the online data. Additionally, 13 nations deemed by the authors to be good contrast points for Kazakhstan were identified and results for these are also presented. The criteria for selecting these 13, alongside Kazakhstan, were: those with a similar background

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[2] Australia, Austria, Belgium (Flemish Community), Brazil, Bulgaria, Denmark, Estonia, Hungary, Iceland, Ireland, Italy, Korea, Lithuania, Malaysia, Malta, Mexico, Netherlands (data not used for international comparisons), Norway, Poland, Portugal, Slovak Republic, Slovenia, Spain and Turkey

[3] https://www.oecd.org/education/talis/talis-2008-data.htm

[4] https://www.oecd.org/education/talis/talis-2013-data.htm

[5] https://www.oecd.org/education/talis/talis-2018-data.htm

[6] Australia, Austria, Belgium (Flemish Community), Brazil, Bulgaria, Denmark, Estonia, Italy, Korea, Mexico, Norway, Portugal, Slovak Republic

(Estonia, Georgia, Latvia, Lithuania, Romania, Russian Federation, Slovenia, Slovak Republic); topmost performers in PISA 2018 (Singapore, Finland, Japan); a nation with very low school autonomy (Belgium) and one with a well-understood and long-standing model of per-capita funding (UK). 78 nations took part in PISA 2018 with the results for those taking part for the 14 nations/regions under comparison extracted from the OECD published online data[7] to link school autonomy with performance.

Details of Primary Research Conducted

The firsthand data used in this research is drawn from an online survey to school principals in March 2020 as part of a collaborative research project between the authors' institutions in UK and Kazakhstan. Data collection occurred during the second year of implementation of per-capita funding in the read capitol city of Kazakhstan, Nur-Sultan and during the first year of implementation in the two next-largest cities of Almaty and Shymkent.

125 school principals in total contributed data. Of these, 53 worked in Shymkent, 57 in Almaty and 15 in Nur-Sultan. Permission was granted by the relevant regional educational departments for recruitment to take place by means of direct email requests to school principals. All schools in the three cities were approached. From the 126, 201 and 82 schools in Shymkent, Almaty and Nur-Sultan, respectively, the related response rates were 42%, 28% and 18% to give an overall response rate of 30%. One explanation for the lower response rate in Nur-Sultan than elsewhere could be that requests for participation were slightly later to be during the first outbreak of the COVID-19 pandemic rather than before.

The anonymous (other than by region) survey comprised several sections: information on the school size and its operation; parental and student background; attitudes towards the introduction of per-capita funding; principals' main activities; role of the school board; and, attitudes towards the current priorities in education. The data used in this paper stems from open response items that garnered attitudes towards past and future benefits of the various funding models.

Findings

School Autonomy and Performance Across Nations

Figure 1 presents the results of secondary data analysis of TALIS 2018 results to illustrate the % of principals reporting high responsibility in making various fiscal and teaching decisions over time.

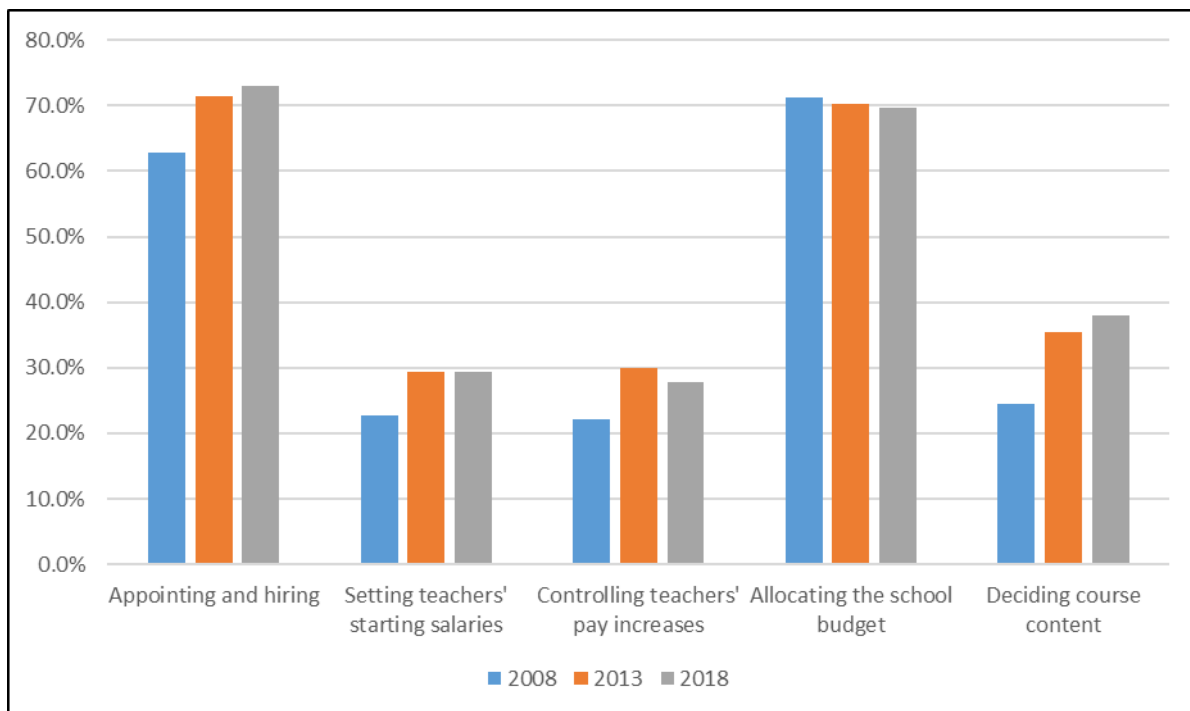[7] https://www.oecd.org/pisa/data/

Figure 1: TALIS 2008-2018 Trends in School Autonomy - Averages of 13 Consistently Participating Countries / Administrative Regions by Year

Interrogating the level of school autonomy reported by school principals from TALIS 2008, 2013 and 2018 datasets, suggests an international trend for increasing responsibility for course content and the appointment and hiring process. Also, to lesser extents, appointing and setting the salaries of new teachers along with pay increases. However, the allocation of the school budget overall appears almost constant with, if anything, a small downturn in the perceived responsibility principals feel they hold from 2008 to 2018. This is an interesting feature since overall school autonomy through a collapsed value appears to be increasing; yet in the critical area of control over budget distribution, principals seem less or at least no more involved. In addition, since the overwhelming proportion of a school's budget tends to be salaries of staff, it suggests that if responsibility of school principals in this dimension is increasing, responsibilities for fiscal decision-making over other matters might be declining, an issue which needs further examination.

Analysis of the most recent TALIS data from 2018 shows a large variation in the way nations split responsibilities between central agencies and schools across different aspects of fiscal decision-making. For example, England, Finland and Singapore have roughly similar levels of principals making decisions over the allocation of budgets in schools (83%, 84% and 87% respectively) but very different approaches to the appointment and pay awards to teachers. Indeed, 90% of appointment decisions are made by the schools themselves in England versus only 51% in Finland and a mere 15% in Singapore. Table 1 illustrates the proportions of principals' responses for key finance-related items in TALIS 2018 across a select group of countries.

Country taking part in TALIS 2018	Proportions of school principals reporting school level decision-making as opposed to regional/national					No. of schools in TALIS sample
	Appointing or hiring teachers	Establishing teachers' starting salaries	Determining teachers' salary increases	Deciding on budget allocations within the school	Determining course content	
England (UK)	90%	73%	78%	83%	81%	319
Estonia	96%	77%	49%	63%	71%	195
Belgium (Flemish Com.)	99%	3%	3%	88%	19%	184
Finland	51%	13%	13%	84%	41%	148
Georgia	96%	29%	24%	97%	23%	328
Japan	11%	4%	10%	57%	34%	393
Kazakhstan	90%	43%	30%	48%	34%	331
Latvia	96%	49%	53%	44%	43%	137
Lithuania	99%	48%	49%	65%	56%	195
Romania	42%	9%	7%	20%	15%	199
Russian Federation	97%	25%	28%	78%	45%	230
Singapore	15%	11%	12%	87%	17%	169
Slovak Republic	98%	61%	46%	73%	51%	180
Slovenia	96%	30%	30%	79%	26%	254
Average values for 14 countries included above	73%	33%	30%	66%	39%	3262
Average values for all 48 countries in TALIS 2018	59%	27%	28%	63%	36%	15980

Table 1. Results from Analysis of TALIS 2018 Data Regarding School-level Versus Regional or National Decision-Making

According to the OECD reports, the level of autonomy experienced at school level by the 331 principals in Kazakhstan taking part in TALIS 2018 compared well across several areas (OECD, 2019b). Our analyses confirmed this. Decisions were made at school level well above the 48-country average for the appointing of teachers and their starting salaries with determining teachers' pay increases once they had been hired was reported to be very similar to the international average. Determining course content at school level in Kazakhstan was again in line with the international average. However, deciding on budget allocations was below the international average for Kazakhstan at just less than half of school principals (48%) reporting they were free to do this compared to the TALIS 2018 average of two-thirds of schools (66%) having freedom to set their own budgets.

The comparison of TALIS 2018 with PISA 2018 to examine the relationship between the level of school autonomy and school performance (measured as 15-year-old student achievement in reading, math, and science) shows the following situation. For TALIS measures of autonomy, Kazakhstan appears to be similar to the international picture (Table 1), however, in terms of student achievement results these lag below the international average in all three domains of PISA 2018 assessment (Table 2).

	Average PISA scores			Rank of performance in relation to the 78 other participating countries			No. of schools in PISA 2018	No. of students in PISA 2018
	Read	Math	Sci.	Read	Math	Sci.		
England (UK)	504	502	505	14	18	14	471	13,818
Estonia	523	523	530	5	8	4	230	5,316
Belgium (Flemish Community)	493	508	499	22	15	20	288	8,475
Finland	520	507	522	7	16	6	214	5,649
Georgia	380	398	383	70	66	73	321	5,572
Japan	504	527	529	15	6	5	183	6,109
Kazakhstan	387	423	397	69	54	69	616	19,507
Latvia	479	496	487	30	24	29	308	5,303
Lithuania	476	481	482	34	35	31	362	6,885
Romania	428	430	426	47	52	55	170	5,075
Russian Federation	479	488	478	31	30	33	263	7,608
Singapore	549	569	551	2	2	2	166	6,676
Slovak Republic	458	486	464	41	32	41	376	5,965
Slovenia	495	509	507	21	14	13	345	6,401
Average for above 14 countries	469	484	477	29	27	28	4,313	108,359
Average for all 78 countries participating in PISA 2018	487	489	489	39	39	39	21,452	598,795

Table 2. PISA 2018 Results by Nation and Domain of Testing

Figure 2 summarises an examination of the possible association between the proportion of school principals reporting autonomy to allocate the school budget and the average national achievement in PISA. This is to assess the relationship between school autonomy and school performance as a prelude to Kazakhstan changing its model of funding. Clearly, this is something that can be examined in more detail as implementation develops and becomes more widespread over time. However, at this point in time, the authors feel it is worth noting the baseline position in 2018 and contextualizing that internationally before changes occur.
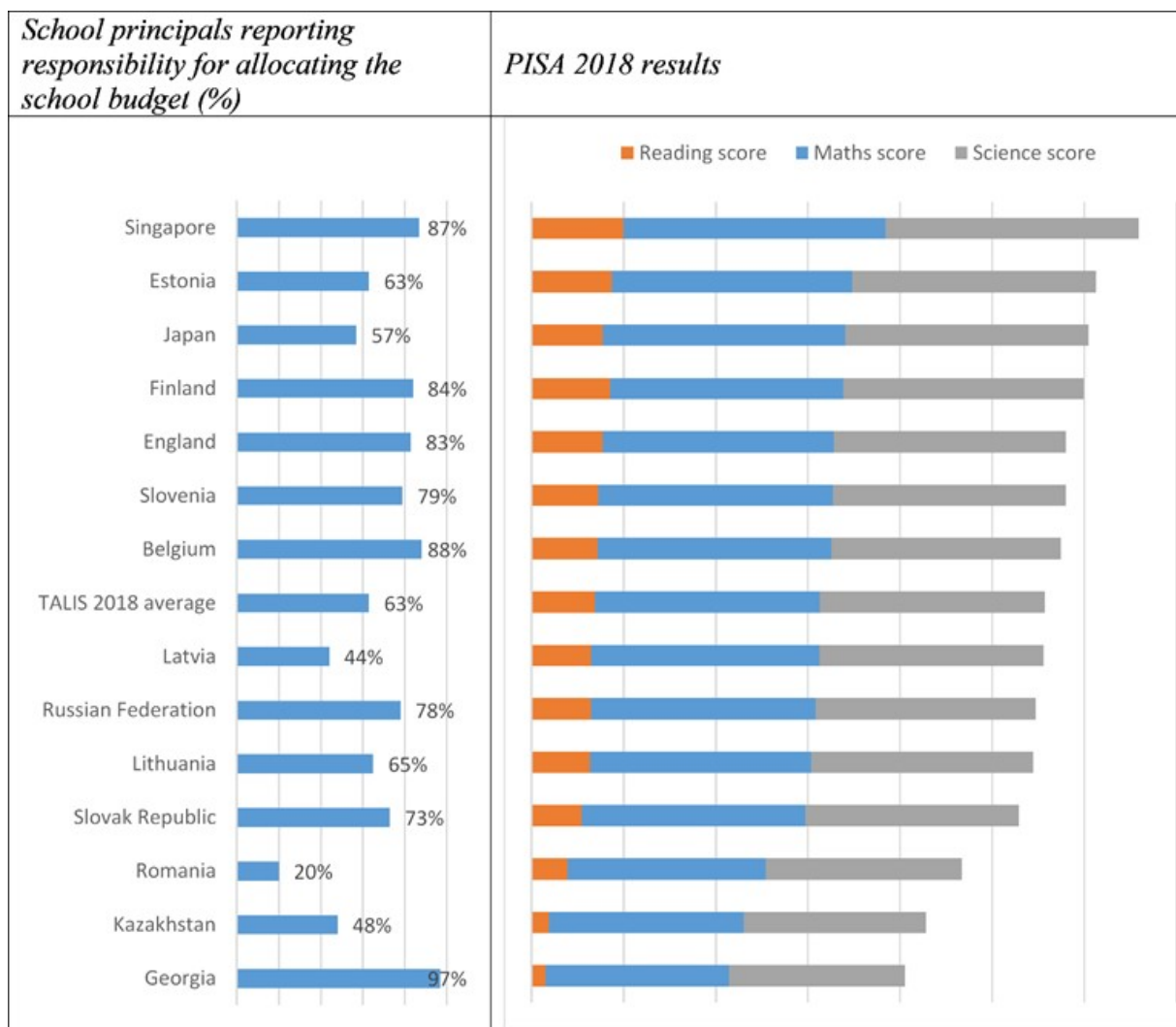
Figure 2. Proportions of School Principals Reporting School-level Budget Allocation Autonomy against National PISA 2018 Results

From our 14 comparison nations, seven countries had student achievement in PISA 2018 above the average of the overall 78-nation score. For these seven, the autonomy of principals to allocate school budgets ranged from 57% in Japan to 88% in Belgium. In the seven countries (including Kazakhstan) that fell below the PISA 2018 average, the range of school budget allocation autonomy covered a wide range. In Romania, only 20% of school principals reported school financial autonomy whilst in Georgia, 97% of principals reported that they are responsible for allocating the school budget. In 2018, Kazakhstan was positioned in-between these two extremes with 48% of school principals indicating fiscal autonomy. As can be seen in Figure 2, no specific attitude towards school fiscal autonomy alleviated Romania, Kazakhstan or Georgia from being the worst performers in the 14 selected countries or being among the worst in the overall 78 countries taking part in PISA 2018.

International comparison of the level of school autonomy reported by school principals in Kazakhstan and other countries' PISA results in reading, math, and science achievement confirm that there is no "one size fits all" solution for establishing what is an appropriate level of school autonomy to boost student learning. Research on the underlying factors explaining why in some contexts school autonomy boosts learning and in some it does not;

suggests the importance of local social factors (Sholderer, 2017). Empirical research is needed to discover what these factors are for Kazakhstan and how this knowledge "can contribute to improved policy and practice" (Arnove, 2013, p. 17) as school funding and autonomy reforms move forward.

Perspectives of School Principals in Kazakhstan on Changes in School Fiscal Autonomy

Responses to open questions in the on-line survey of principals in Almaty, Nur-Sultan, and Shymkent conducted in 2020 revealed an overall positive reception to per-capita school funding. However, some specific concerns were evident regarding school financial autonomy and school management which might impact school performance.

The initial experience of per-capita funding implementation produced contradictory assessment of financial autonomy granted to schools. One of the principals said that per-capita funding presented an opportunity for the schools "*to manage finances independently*" while another principal stated that "*There is no [financial] autonomy*". All principals who commented on school autonomy were in support of more freedom for schools to make budgeting decisions. One area that several principals commented on concerned the prescriptive procedures stemming from state procurement laws. One suggestion was to reduce the need for many tenders, "*each school has the right to purchase school supplies directly, without a tender*". Despite the more direct financial route from government to schools by the introduction of per-capita payments, several school principals were critical of what they saw as a continuing restrictive effect of municipal education departments, with one participant writing:
> "The school should have autonomy in making decisions about financial opportunities. [I recommend] Removing district education departments as an unnecessary and inhibiting link on school development."

This request for more financial autonomy was accompanied with the recognition that schools need to be free to invest in their teachers in order to improve educational quality. One of the principals who positively assessed the fit of per-capita funding to meeting the needs of the school, said: "*The material base of the school will improve and there will be an opportunity to encourage the teaching staff*" Increasing teachers' compensation and improving the work conditions was the most frequently mentioned urgent issue that needs to be addressed in the context of per-capita funding.

The adequacy of funding is essential for achieving school improvements (Barrett, 2014) and was emphasized by the principals in this study as well. When evaluating the amount of money school principals received in per-capita funding model, half of principals from Nur-Sultan who implemented per-capita funding since 2018, said that the funding has increased or is sufficient, while the other half said the funding was not sufficient or even decreased "*due to the adjustment coefficient*" applied to schools with the number of students exceeding the physical capacity of the school. Among principles from Almaty and Shymkent who started the implementation of per-capita funding in 2019, 46 expressed their satisfaction with the level of funding increase under-per-capita model, nine principals said there was no difference in the amount of money received, and three principals said the financial situation had become harder. One principal stated that an increase in funds would benefit both the conditions for and actual teaching in the school "*The material base of the school will improve and there will be an opportunity to encourage the teaching staff.*"

The link between the number of students and sufficiency of funding is explicit in per-capita funding model and school competition for students emerged as a theme. Several principals expressed concerns that per-capita funding would result in winning and losing schools (In Russian: viigravshix i proigravshix) because of social environmental factors beyond the control of the school. One such factor for schools in parts of the city with a lack of modern housing was outflow of residents to other parts of the city with better housing conditions:

> "The transition to per-capita funding that creates competition between schools presents a difficulty for our neighborhood because the local homes do not meet modern standards. The number of children from year to year is decreasing due to parents relocating. It is a nomadic (Kazakh) tradition to seek better pastures."

Several principals stated that to be able to implement school-based management and perform well in the conditions of per-capita funding, they need training in human resources management, financial and marketing literacy. The development of the overall management skills was mentioned as an important current need to be addressed for changing the way schools to achieve holistic school improvement. One school principal mentioned that an important issue that needs to be addressed sooner than later is "*Strengthening Boards of Trustees and applying new forms of management*"

As this data shows, school principals from Almaty, Nur-Sultan, and Shymkent embrace financial autonomy of schools and are critical of restrictions that exist for schools making financial decisions. At the same time, they acknowledge the need for developing their managerial skills to lead school improvement. Concerns were also raised with regard to equity and competition between schools that could drive the standing of some schools even lower in the minds' eye of parents.

Conclusion

The global position on schools having responsibility for managing their own budgets appears virtually unchanged from 2008 to 2018. Over this ten-year period, around two-thirds of all school principals consistently declared they had prime responsibility for allocating the school budget. Meanwhile, over the same period, other types of school autonomy such as decisions on staffing and defining content have leant towards growth.

Kazakhstan's position in 2018 on schools' financial autonomy was below the international average with less than half of all school principals declaring it applied to them. This suggests that it was timely in 2019 for Kazakhstan to comply with the international norm of a higher proportion of its schools operating with strong fiscal autonomy. Hence, if Kazakhstan is striving for modernisation, implementation of per-capita funding seems a judicious move. One caveat of judging the success of decentralization through measures such as TALIS in nations such as Kazakhstan is that with the large number of small rural schools which may sit outside simple single school per-capita schemes, care has to be taken in interpreting proportionate measures of change that use numbers of schools rather than numbers of students.

The most recent cross-national TALIS 2018 results for fiscal autonomy show great variation but still present some interesting patterns in relation to student performance data. It is noteworthy that countries, like Kazakhstan, that have a minority of school principals declaring responsibility for budgetary decisions tend to be positioned, like Kazakhstan, among the worst-performing nations in PISA 2018.

As Kazakhstan moves towards decentralization of school finance, a 2020 survey of school principals in the three cities in Kazakhstan introducing the new per-capita model of funding were positive about its effects and showed interest in developing autonomy further. Many school principals showed awareness that school autonomy could lead to better performance by encouraging good teachers and improving school facilities. The most significant finding was that to achieve the full potential that fiscal autonomy could reach, principals were explicit that they need training on various aspects of organizational management in order to lead and improve change more effectively.

Acknowledgements

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