Country Selection Process:
Criteria for Feasibility Analysis

RISE – Research on Improving Systems of Education
RISE Country Selection Criteria

Introduction

The Education for All and Millennium Development Goals were powerful vehicles for focusing education policies and strategies over the past 15 years. As a consequence of national and international efforts, the number of out of school children has decreased significantly, and there are significantly more schools, trained teachers, and teaching and learning materials than ever before. However, despite these advances in schooling there are challenges in education. Many students emerge from primary education without the basic numeracy, literacy, and learning skills for more advanced learning, and are ill equipped to succeed as adults. This learning crisis requires massive re-orientation of efforts from expansion of enrollments to improving learning outcomes.

However, the existing evidence base does not adequately guide developing countries on how to achieve these goals. While there is an enormous literature on the correlates and proximate causal determinants of student learning, there is limited evidence about how and why education systems perform the way they do, what the critical constraints are, what policies or interventions have potential to unblock these constraints, and what the impacts of large scale systemic reforms are on learning.

Therefore, to build evidence for decision makers on a wide range of themes and issues linked to effective education systems, successful reform, and improved learning outcomes, the Department for International Development (DFID) has commissioned a large-scale, eight-year research program that will take place in up to five countries. The aim of the Research on Improving Systems of Education (RISE) program is to develop a new global paradigm that reconceptualizes how we think about education systems as systems. Rather than focus on “if this is done students learn more,” the central question will be “what are the features of education systems—the way in which goals are set, progress is assessed and measured, the profession of teaching and the career of teachers is structured from training to hiring to progress, schools are financed and managed, and innovations produced, evaluated and disseminated—that lead as the consequence of the operation of the system to better schools, better teaching practices, and children better prepared for their future?”

The RISE program will focus on learning from successful and unsuccessful reforms, analyzing performance of education systems, understanding how to effectively implement reform policies, and evaluating the impact of large-scale system reforms on learning. Overall, the main objective is to determine what does and does not work well to improve learning outcomes. This information will be used to help concentrate resources and efforts to accelerate the rate of learning in developing countries.

This document is, the first step in a longer process of narrowing down the geographic focus of the RISE research program, and provides a description of the country selection criteria that will inform a process of feasibility analysis by the Research Directorate and Programme Directorates. The document discusses why each criterion is important, how information for the
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criteria will be collected, and some preliminary ideas about a methodology for country feasibility analysis and selection, which will be further fleshed out in a country feasibility analysis due Spring 2015. The criteria aim to ensure that focus countries in the research program provide opportunities for determining what many countries around the world can learn about effective education systems reform, and what needs to happen at the system level to improve learning outcomes in low-performing countries. As this is a research endeavor (not an operation or project), the country selection criteria are framed by what makes a country promising as a participant in a research project and hence may differ from prioritization on other operational criteria.

**Country Portfolio Overview**

In-country research for the RISE program will take place in up to five focus countries that provide the greatest opportunity for learning about system reforms to improve learning outcomes. These countries will be narrowed down during the Inception Phase (Year 1) of the program by the Research Directorate (RD) 1 at the Center for Global Development (CGD)—an independent, nonpartisan research organization based in Washington, DC—and the Programme Directorate (PD), (contractor to be determined). 2

In this section we discuss the attributes of the portfolio of countries we recommend including in the RISE research program. Thus here we discuss the key characteristics of the portfolio of countries, not the individual country screening and selection criteria, which are discussed at length below. Countries will be balanced across a range of desirable characteristics which will be discussed in the summary and discussion sections of the feasibility analysis when comparing countries to one another. For example, the discussion could say that while countries X and Y meet most of the criteria, we recommend studying X over Y because X and other countries make for a group of countries that are more balanced across desired criteria and make for a portfolio that could generate greater learning.

The DFID business case for the RISE research program discussed some desirable characteristics of the portfolio. For example:

“This research will have an intensive focus on up to 5 DFID core countries with the greatest opportunity for significant learning about what works to reform education systems to deliver learning outcomes. The intensive investment in researching single education systems should allow a greater integration of research with the education system of that country and incentives to help shift academic focus into a new field of research. Evidence from other fields suggest that an intensive country focused research programme can “create outstanding research groups at

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1 The RD, supported by the Intellectual Leadership Team (ILT), is responsible for building an intellectual
2 The PD will have overall responsibility for RISE program and research management, communication, and uptake of research.
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national and international levels …[and] offer the greatest likelihood of sustainability.” However these “require considerable “buy in” from national decision-makers or universities, are sensitive to the leadership of committed individuals and generally require substantial international funding over the long term”. DFID’s network of country offices and advisers offer a potential value-add in helping to broker and sustain these relationships.

This research will focus on three types of countries:

- Countries of central importance in the medium-term to DFID programmes and policy (e.g. Pakistan, Kenya, Malawi, Ghana, Rwanda).
- Fragile and conflict afflicted states (Somalia, South Sudan, Afghanistan).
- 1 emerging country/regions that will offer strong lessons on reforms at scale to improve learning (India or East Asia)."

We argue that given the business case for making an impact on outcomes in DFID priority countries, research can also be carried out in other countries not on the priority list, for two fundamental reasons. First, in order to learn lessons about how to improve education systems to accelerate learning using a new global paradigm, conducting research in some countries outside the priority list that provide lessons for priority countries will be necessary. For example, to change education practices in Malawi one often needs lessons drawn not just from Malawi but also from other countries. In fields like education, there is a strong global approach that heavily influences what happens in Malawi both through learning from global lessons by policy makers in Malawi, and also changes in the global and international discourse on education. If one examines the “theory of change” of change in country policy in a variety of fields—central banking, trade policy, public-private partnerships for infrastructure, reproductive and child health, environmental regulation—country policies changed as part of a global paradigm shift. Hence, it may well be that research in countries in which research is propitious for other reasons will be the best way to influence policy in priority countries like Malawi. Second, this need for lessons to be drawn from emerging countries is clearly articulated in point three of the business case. Any countries outside of the DFID list that are recommended for selection will include justification based on the selection criteria described in this document, with a clear focus on their potential to provide lessons for DFID priority countries.

In addition to DFID’s country focus, here we discuss several other attributes we hope to see balanced across the country portfolio - population size, performance on a range of international and local assessments, and geographic diversity.

**Country size**

Within the package of recommended countries, country population size is important for several reasons.

First, in a large country—especially one large enough to have some element of federalism or decentralization (e.g. India, Indonesia, or Ethiopia)—a research project structured at the state
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level has multiple chances to succeed in districts or provinces, whereas in small and unitary nation-states, complete failure is an option. Diversity in within-country contexts will provide an opportunity to observe how reforms can succeed or fail under a variety of circumstances. Further, due to the high fixed costs of starting research in-country, it is desirable to have diverse options within a federal structure to continue research if reforms in some of the states or provinces selected for research fail.

Second, medium and small countries are often willing to take lessons from large countries but not vice versa. Thus, influence on the global knowledge base and discourse is more likely to be successful if starting from large countries.

Third, “global” outcomes are the population weighted average of country outcomes, so size matters from a global perspective. Outcomes from larger countries are not given the same weight as those from smaller countries.

Therefore, priority in selection will be given to large countries, but countries will not be excluded on size. A balance in country size will be sought across the package of recommended countries.

As part of the brief country profile on each country, the research feasibility analysis will discuss things like population size, government structure, and any other country characteristics that would be principally relevant to the RISE program.

**Balance in performance (good/weak/worse)**

Another important characteristic of the country portfolio is that there is balance across countries in learning performance, meaning that the study countries should include a mix of “good,” “weak,” and “worse” learning outcomes. Using international standardized assessment equivalent measures, such as those set by the Programme for International Student Assessment (PISA) or the Third International Mathematics and Science Study (TIMSS), “worse” countries would be in the 300-point range, “weak” in the 400-point range, and “good” in the 500-point range. This performance range is desirable because it allows lessons to be drawn and applied for countries at various performance levels. Countries in the 300-point range (e.g., parts of Africa and India) have to address basic education system needs, and therefore may need radical or disruptive reform, while countries in the 400-point range (e.g., places in Latin America, Indonesia) probably have basic control of the system, but poor means of promoting learning within those systems. Moreover, countries in the 500-point range (e.g., Vietnam) can provide lessons on how successful countries have become effective, as well as some second generation reform lessons. If the data are available, the RD will also consider within-country balance in performance as a desirable characteristic at the country level.

All available assessment data will be used to measure country performance, including international, regional, national, and sub-national assessments. These assessments could include TIMSS and PISA, which have been expanding their coverage of developing countries; the regional efforts of Southern and Eastern African Consortium for Measuring Education Quality (SACMEQ) in Southern and Eastern Africa; the Programme d’Analyse des Systemes Educatifs de la CONFEMEN (PASEC) in Francophone Africa; the ASER reports in India
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(combined with Education Initiatives); LEAPS in Pakistan (combined with ASER-Pakistan); and the UWEZO reports in East Africa. Country-level assessment scores, and sub-country-level assessment scores where available, will be included in the country profile section in the research feasibility analysis.

**Geographic diversity**

Geographic location will also be considered during country selection. Like performance, it is desirable to have balance between geographic regions so as to learn from different contexts and help make research results more generalizable to different areas around the world. Countries or regions within countries that have not been significantly studied may be given special consideration.

Geographic diversity will be included in the summary and discussion sections of the research feasibility analysis when discussing factors that would make for a strong research program.

**Country Selection Process**

The country selection criteria are the first step in a full process to select countries that will comprise a diverse and balanced package of countries first described in the DFID business case for in-country RISE program research. The process for country selection is as follows. The RD is responsible for identifying and defining country selection criteria. The RD will gather information on these criteria during country scoping trips, through desk research, participation in the Education World Forum, and consultations with the Intellectual Leadership Team (ILT), PD, and DFID country advisors to determine appropriateness of various countries for the RISE research program. Additionally, once the PD joins the program in January 2015, they will contribute to information gathering for countries across the criteria for the research feasibility analysis due April 30th, 2015. Precise agreement on what the PD will contribute will be agreed in discussions between the RD and PD between December 2014 and end January 2015.

Using country information gathered on the criteria, the RD, with input from the PD, will complete the research feasibility analysis by comparing countries across the criteria to determine a recommended short list of eight to ten countries for research selection. Since the goal of the prioritization process is to produce a “medium list” of countries for which to solicit proposals, and since balance among countries in various dimensions is important to the overall portfolio, the criteria will generate a medium list and selection will not be based strictly on a mechanical country-by-country score.

3 The ILT is comprised of education experts from around the globe, and will contribute to the research agenda by providing a range of substantive inputs, such as working papers, reviews, comments and suggestions, and overall thought leadership to the RISE research program.
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Also due April 30th, the RD will submit a first draft of country research team Terms of Reference (ToRs) based on the research feasibility analysis. Then, the PD may conduct additional analysis as needed for the short list of countries recommended by the RD. This analysis may include more in-depth information gathering across the criteria developed by the RD deemed necessary by the RD and PD for successful country selection and procurement of country research teams. The RD, with input from the PD and ILT, will complete final country team ToRs July 31st, 2015. The timeframe and process for the selection and procurement of countries will depend upon agreement between the RD and PD in January.

Country Selection Criteria

High Priority Criteria

The following criteria are those that the RD has deemed most important and should weigh most heavily in the country selection process.

Criterion 1: Presence of interesting (elements of) system reform that have happened or are about to happen

The presence of interesting education system reforms is the highest priority criterion because the interesting elements lay the foundation for the RISE research. Countries that meet all other criteria but are not home to interesting reforms or planned reforms likely are not worth studying.

A key lesson of empirical research is that to identify causal impacts one needs variation in the causes—and for purposes of precision, the bigger the better. This lesson applies to systems research in three ways.

First, a research project cannot induce system change; it can only (at best) trace its implications as, and after, it happens. This means that, unlike research into proximate determinants of learning, for instance, where researchers can provide additional inputs as part of a research project, researchers cannot make system reform occur just to study it.

Second, while one can use small experiments to identify causal impacts of specific variables (e.g. textbook provision or conditional cash transfers (CCTs)), they are no substitute for systems research. This is because there are pervasive interactive effects (e.g. the impact of X depends on the availability of Y) in a system that a series of experiments would not capture and therefore could not be used to predict system reform impact, and because the impact of a reform depends on how and who implements it.

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4 The country research teams will be established in up to five focus countries, and will be responsible for in-country research design and implementation for the RISE program, with significant support and input from the RD/ILT.
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Third, related to experimentation, it is important that any reform being tested, by an NGO, government or other implementer, be scalable. It may be possible to evaluate a small pilot reform, but only if it is a scalable project. There is new, strong evidence that impact evaluations of NGO-implemented education projects have little predictive power for those same projects implemented by governments. Therefore, small projects that could go to scale may be considered for study, but only those NGO-implemented projects with strong arguments for scalability would be considered.

Fourth, without reform that is large (and perceived permanent) one may have a series of low statistical power rejections of the null, which do not explain the impacts of reform, only that it was too small to detect any effects on the target population. For example, if one wants to examine the impact of changes in curriculum, it will be hard to detect impacts of minor changes. One could rarely distinguish whether the curriculum impact was small—but exactly the expected size given the small change—or that it has zero impact.

Therefore, the presence of interesting system reform, such as system-level change in how teachers are recruited and compensated, how information about student performance is collected and disseminated, in education learning goals, or other system features, is an important criterion because it is not possible, or at least, not advisable, to determine the outcomes of system-level reform by studying smaller interventions that are not scalable.

Further, while researchers on small-scale features can generate their own variation to examine particular projects or policies, they cannot generate system reform. To best capture effects at the system level, understand what may cause systems to change and what may prevent system innovation, studying system reform as it happens if possible, or evaluating system reform after it has happened, is highly desirable—as it is the best that can be done. The countries with previously implemented reforms or that are implementing reforms provide the opportunity to analyze the political economy of how reforms happened and why they happened. Political economy analysis has limited predictive power ex ante, and therefore is a more useful tool for evaluating ex post country contexts in which reforms have already happened.

The research feasibility analysis will describe the range of system reforms underway or planned in a country, including the stage in the reform process. This could include reforms such as: criteria for hiring, promotion and firing teachers; ease of entry into the private sector; availability and affordability of different types of schools (private, public, high and low quality, etc.); curriculum reform; union influence; the way a system supports children with a variety of abilities and backgrounds (such as income and language); or the extent to which the system encourages parental engagement. Once the reforms or potential reforms are described in the research feasibility analysis, the research feasibility analysis will then discuss why such reforms would or would not be relevant to the RISE research agenda, and how such reforms might be studied. When evaluating country options, the RD will also note which countries lack reforms or a reform agenda and justify why they would not be appropriate for the RISE research program.
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**Criterion 2: Local research partner capacity and availability**
Local research partner capacity (or the availability of a high-quality local research partner), including both regional and in-country partners, is the second high-priority criterion. Country research teams can include internationally based researchers, but a strong country-based team is essential. Potential local partners could be organizations such as data collection firms, think tanks, universities, government agencies specializing in research, or research consultancies, and should have demonstrated experience designing rigorous studies, effectively collecting high-quality data, and if possible and applicable, completing data analysis.

This is an important criterion for country selection because, while there are many high-quality sources of cutting edge capability in research around the globe, any of them would have a difficult time generating and maintaining a high-quality research program without a local partner. A local partner provides knowledge about the policy context and implementation at the system level, connections and logistical experience necessary for smooth research operation, and can either conduct or supervise data collection. Further, local partners disseminate research, and help foster local buy-in for future education systems research, and potentially reform, especially if these partners have connections to key actors and decision-makers in country.

The research feasibility analysis will include details about research partner candidates, their key capabilities, and a general discussion of the research capacity the country is lacking. Note that the partner candidates will not have committed to any research partnership – the RD will propose these organizations as potential partners.

**Criterion 3: Country enthusiasm and political support for system research**
An open environment and interest in education systems research and reform is also a key priority criterion for selection. Strong entry points for research, including the presence of cooperative officials, education providers, and interesting system reforms all contribute to the effective implementation of the program. Further, high-level political interest and engagement is highly desirable not only to facilitate research implementation, but also to provide a receptive audience for research results and recommendations. A country may meet criterion 1 in terms of being home to interesting research reforms or planned reforms but if the local stakeholders involved in or affected by the reforms are not interested in evidence about the reform, the country is likely not a good fit for the RISE research program. It should be noted that country enthusiasm and political support means enthusiasm by a diversity of stakeholders, for example, the government, private sector, NGOs, etc. Given that those in government will likely shift over the course of the program, country enthusiasm by a diverse group of stakeholders will be important to program success and will require ongoing engagement by country research teams.

The research feasibility analysis will describe the level of openness to systems research based on the RD country visits and background research. The PD will expand on this in the second phase of feasibility analysis by providing updated or more detailed information on the environment for systems research and reform.

**Additional Criteria**
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The following criteria are those that the RD feels should be considered in the country selection process but not as heavily as the above criteria.

**Criterion 4: Availability of alternatives to hierarchical schooling organizations**
Availability of alternative schooling organizations to the traditional top-down and hierarchically publicly-managed provision is also a key criterion for country selection. This is an important criterion because the RISE research program’s focus on system reform does not just mean public sector production reform. Community organizations, religious schools, private institutions, and NGOs are examples of alternative schooling organizations that can play an important role in providing education in developing countries. Therefore, it will be important to include providers outside of government in a systems approach. Further, there is some evidence that providers outside the public sector (e.g. tutors, private schools, community contract teachers) can have positive, cost-effective impacts on learning. These findings are intriguing and merit further investigation at a system level. Thus, to study and discuss how alternative producers of schooling can be incorporated into systems to enhance performance, it would be helpful if the selected countries already allowed alternatives to operate.

The research feasibility analysis will describe the availability of hierarchically publically-managed alternatives based on desk research and the country visits, and their relevance to the RISE program.

**Criterion 5: Robust data architecture**
Availability of robust (enough) data architecture will also be considered during country selection. This architecture may include EMIS systems, participation in PISA and other international or regional assessments, and randomized control trials (RCTs). This data is useful because it provides background on system functioning and performance that would inform research questions and further data collection needed in-country. Further, diagnostic learning assessment tools and systems already in use would be ideal. Since the research will be focused on learning outcomes, the use of assessment tools would make learning outcome data collection easier and potentially provide several years of prior learning data from which to calculate trajectories and changes over time.

The research feasibility analysis will provide a description of data sources available in countries selected for the analysis, including frequency of collection, type of data collected, on whom, and an evaluation of the overall quality of the data. It will also explain how these sources could be used in the RISE program. This information will be collected through desk research and RD country scoping visits.

**Criterion 6: Potential for overlap with other relevant evidence-based or data collection programs**
Overlap with other relevant evidence-based programs or data collection efforts, such as DFID education programs, programs funded by the BE2 consortium, SABER, PISA for Development, or Young Lives would be beneficial. SABER, led by the World Bank, collects and analyzes
policy data on education systems around the world to highlight the policies and institutions that seem to most effectively promote learning for children and youth.5 Using enhanced PISA assessment instruments appropriate to developing countries, PISA for Development aims to increase developing countries’ use of PISA assessments to monitor progress towards targets for improvement, analyze factors associated with learning outcomes, and track international education targets.6 Young Lives is an international study of poverty following two groups of children from early infancy to young adulthood in four different countries: Ethiopia, India, Peru and Vietnam.7 The presence of these programs, and others like them, provides opportunities for potential collaboration, and could compliment data collection undertaken over the course of the RISE research program. A Young Lives presence would be particularly desirable. As it includes data on household characteristics and learning outcomes, Young Lives provides a unique, and—within the lifetime of the project—not reproducible advantage at looking at sources of early disadvantage and subsequent performance, as well as comparative learning trajectories.

The research feasibility analysis will describe other relevant evidence-based programs and data collection efforts underway about or in each country, how they may be useful for the RISE research program, and propose opportunities for collaboration, if applicable. Information for this criterion will come from country scoping trips, desk research, and ILT member input.

**Criterion 7: In-country partnerships and connections**

PD, and ILT familiarity with a country will be a criterion for selection. It is an advantage to begin the research program with some background experience, relationships with a variety of stakeholders, and knowledge of the political, economic, social, and policy context. This familiarity will contribute to country ownership, thus supporting the smooth implementation of the research program, uptake and dissemination of research results.

In particular, a strong relationship with a local group of donors and other education stakeholders that works with government will be particularly important. This group could include but is not limited to the DFID education adviser, World Bank staff, USAID staff or other partners. The ways in which these relationships and connections will be used and built through this programme will be detailed in the Country Engagement Strategy, led by the Programme Directorate.

Information for this criterion for the research feasibility analysis will come from discussions among the RD, PD and ILT.

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5 http://saber.worldbank.org/index.cfm
6 http://www.oecd.org/pisa/aboutpisa/pisafordevelopment.htm
7 http://www.younglives.org.uk/
Information Collection

Information on the criteria will be gathered to inform the research feasibility analysis in several ways. As shown in Table 1, this includes relying on a variety of sources of information, such as secondary sources, first-hand knowledge of the ILT and RD and country scoping trips by the RD. The presence of interesting reforms (criterion 1), local research partner availability (criterion 2), enthusiasm for systems research and reform (criterion 3), availability of alternatives to hierarchical schooling organizations (criterion 4), data architecture (criterion 5), and potential for overlap with other relevant evidence-based or data collection programs (criterion 6) will be informed by literature review, including SABER country reports, ILT and RD member experience and knowledge, and meetings with DFID education advisors, ministry officials, research organizations, and education providers during country scoping trips. Further, efforts by the government to implement substantial education system reforms will also signal commitment and interest in systems research and change. International, regional, national, and subnational assessment data such as PISA, TIMSS, ASER and SACMEQ will be used to evaluate countries’ performance levels.

Table 1: Country Selection Criteria Modes for Information Gathering

<table>
<thead>
<tr>
<th>Number</th>
<th>Criterion</th>
<th>Literature review/desk research</th>
<th>ILT/RD knowledge</th>
<th>Country scoping trip meetings</th>
<th>International and regional assessments</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Presence of interesting (elements of) system reform</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>2</td>
<td>Local research partner capacity and availability</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>3</td>
<td>Enthusiasm and political support for systems research and reform</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>4</td>
<td>Availability of alternatives to hierarchical schooling organizations</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>5</td>
<td>Robust data architecture</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>6</td>
<td>Overlap with other relevant programs</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>7</td>
<td>In-country partnership and connections</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
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<td>Cross-country</td>
<td>DFID priority</td>
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<td>Country size</td>
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<tr>
<td>Cross-country</td>
<td>Balance in Performance</td>
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</tbody>
</table>
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Ideas for Country-Selection Methodology

The following section provides an overview of our thoughts about how to set up the country selection methodology to be undertaken as part of the feasibility analysis to be completed by the RD by April 30, 2015. This approach will be adapted throughout the Inception Phase. The goal of the feasibility analysis is to ultimately narrow down the country list to eight to ten countries that could be home to the RISE research program.

The research feasibility analysis will likely include a profile of relevant background information for each country, a discussion by country about how (or how not) it meets each high and additional priority country-specific criterion (criteria 1 to 7), providing evidence gathered and analyzed through literature review, other desk research, meetings with key informants, and country scoping trips. Feasibility analysis will also include suggestions for further research feasibility mapping by the PD. Countries will be discussed and compared to each other according to the analysis across criteria, with particular attention given to whether they meet the high priority criteria. Additionally, those characteristics that are desirable across the group of countries, not within a particular country, will not be included in the individual country analysis. These include balance in DFID’s priorities, country size, student performance and geographic diversity. Instead, they will be discussed in the summary and discussion sections when comparing countries to one another. Note that the criteria described are largely qualitative and subjective. For example, the extent to which a country’s education system contains “interesting” or “promising” elements will be argued through an array of evidence gathered by the RD and PD, but ultimately such a determination, like all complex decisions, has to be based on professional judgment, not a mechanical application of a rigid formula.