

### Education and international regionalism: a comparative account of Europe and Latin America

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**ABSTRACT** This article explores the reverberation of the European Union Open Method of Coordination and the Ibero American States Organisation educational plan in education policy-making. In essence, a comparative analysis of these two processes highlights the role of political agents and the knowledge they use. Instead of inexorable processes, global transformations are complex insofar as political players push for them by acting from varied geographical scales. Developments in Europe and Latin America remind of regional or continental integration, which is a relevant scale of policy-making altogether with national policy and the emerging global agenda. International organisations, national and sub-national governments, and national and trans-national civil society networks have a say in these processes.

#### KEYWORDS

Sociology of education. Educational policy. Globalisation. Comparative education

#### Introduction

For the last decade the focus of educational and international studies has been converging in many ways. Although UNESCO definitely introduced education in the agenda in the 1940s, the issue gained momentum much later, with the World Bank involvement in the eighties. Afterwards, the World Trade Organisation decided that education was affected by the General Agreement on Trade and Services, and the Organisation for Economic Cooperation and Development launched its Programme for International Student Assessment. At the same time, the movements towards the political integration of Europe and Latin America opened the debate on what a regional education should be in these two world areas.

These processes are symptoms of globalisation in the educational terrain. In fact, when deciding policy in such issues as schooling, literacy, lifelong learning, school management, pedagogy, social benefits for children, IT and innovation, tertiary education, student exchange and others, any government has to face the recommendations, sometimes the critique, of international agencies, NGOs, lobbies, movements, think tanks and corporations who push for different agendas worldwide. Despite the diversity of positions, an emerging, mainstream framework compels decision-makers to be aware of certain guidelines favouring Education for All, parental choice and school autonomy, child-centred pedagogy, conditional cash transfers, vocational training, expanding post-compulsory programmes, and student mobility.

These ubiquitous transformations depict an image of inexorable trends that apparently operate beyond human agency. From the point of view of a single educational authority, either national or sub-national, it is easy to perceive that these proposals are the premises of best practice rather than varied political projects promoted by particular agents. In general, this actor-

blind understanding of globalisation is actually inspiring many political discourses in support of reforms, sometimes legitimising unpopular measures on fiscal consolidation, labour conditions, financial regulation, privatisation and foreign trade, not least education.

In contrast with this image, the participants in any debate on strategic challenges that aspire to produce a reliable outcome must be aware of the supra-national politics that have generated global policy agendas in many areas. In this article I make a plea for agency- based accounts of the underlying process in education. In my view, several research findings underscore this point.

It is crucial to find out who are the influential agents in a given policy area by looking at their political capabilities and ultimate interests. Moreover, it is necessary to look at their discourses about the expected impacts of their proposed policies, that is, how these policies are expected to change the real world. The increasing recognition of these “theories of change” that are embedded in official initiatives is certainly a reminder of the interplay whereby they have been elaborated, but it is also suggesting new methods of policy evaluation that could eventually enrich the public debate with the features of a more deliberative democracy.

In my article I am going to compare educational regionalism in the European Union and the variety of projects in favour of Latin American integration, with a special focus on the Educational Goals recently promoted by the Organisation of Ibero American States (OEI, in both Spanish and Portuguese). The first section sketches the key analytic concepts that may be helpful in order to identify the commonalities and differences between these two processes, notably, the role of agents and knowledge. The next two sections portray the case studies. The forth section discusses the comparison between both of them, and makes a general point on the importance of these analytic concepts.

### **Globalisation, regionalisation and education**

Since the 1990s the global transformation of education policies is quite visible in the strength of certain global trends. But it does not consist of a mere institutional convergence driven by some kind of universal force. Instead, researchers have noticed that discourses are becoming more and more similar in quite heterogeneous and distant countries throughout the world, although the historical legacy of their educational systems is not vanishing. Global and national processes intermingle.

Global discourses are not only empty words and idealistic discourses that are not effective at all. On the contrary, they have produced new kinds of political capabilities that agents use with an explicit intention to gain advantage. For instance, discourses about the knowledge economy have influenced political preferences for more than a decade in many countries (Robertson, 2005). Standard examinations and the resulting datasets have also fostered a new form of governance (Ozga, 2009) which is instilling subtle and decisive social norms related to accountability into the professional identity of teachers and principals and the political views of parents (Maroy, 2012).

The former observations illustrate how globalisation impinges on education, but analogous trends could be highlighted in many other faces of social life. Experts in international relations have convincingly argued that this continuous migration of political messages from country to country, world region to world region, and international agency to international agency, are expressive of a deeper social change (Strange, 2001; Held & McGrew, 2007).

A brief notice of the origins of comparative education may be relevant to make sense of this transformation. In the Nineteenth century many intellectuals searched models for educational institutions abroad. Thus, Humboldt's concept of university was admired and partially replicated in other countries. From France a notion of the Republican school was disseminated to Southern Europe and Latin America, albeit with significant ideological qualifications depending on the country. These were bilateral transfers of institutional patterns from one country to another, normally in a partial way, which took place along important periods of time. Nevertheless, this is not the kind of international policy diffusion we find nowadays. The configuration of a global agenda implies a constant, multi-lateral and very quick pattern of transfer in many directions. The search of foreign models underwent dramatic acceleration after the cultural crisis that the Sputnik episode provoked in the United States. Afterwards, the growth of unemployment fostered further acceleration in many Western countries who emulated VET systems from other countries with a lower unemployment rate. The structural adjustment imposed to countries which were exposed to debt crises in the eighties and nineties was certainly another driver of this importation of educational ideas across borders. And the main activity of agencies such as UNESCO, the World Bank and OECD has been stimulating cross-national inspiration afterwards.

Education has contributed to modify the basics of the modern state in this way. Since the seventeenth century the relationships between these states had been organised according to the Westphalian regime, which takes whole sovereignty on a clearly bounded territory for granted. Actually, in the late Nineteenth century the strength of modern, national states led to the expansion of primary schooling in a number of powerful countries. However, this sovereignty cannot be a premise any longer if governments feel their decision-making is compelled by an international agenda.

The emergence of global cities, the importance of technological hubs, the new strategic value of networked organisations, the formation of transnational social movements, and moreover, the overwhelming increase of financial capital have triggered the social changes associated with globalisation altogether with the definition of a supra-national agenda in many policy areas (Held & McGrew, 2007). Even though experts debate which historical moment was the watershed, either the oil crisis in the 1970s or the fall of the Iron Curtain in the 1990s, in fact everybody agrees that all these transformations come from older roots but have reached a tipping point sometime in the last decades. In this view, it is not surprising at all that educational globalisation somehow intermingled with the transformation of the modern state.

The former social trends are so complex that, paradoxically, globalisation has become regionalisation in many areas of the world. Significant examples are the European Union, the Asian Pacific Economic Conference, the North American Free Trade Area, the Latin American common market MERCOSUR and the Commonwealth of Independent States. Each of them fashions a world region in quite particular ways, with differential capacity to enact effective influence, but all these cases remind us of the increasing interest in bringing neighbouring states to the same room of negotiation to agree on some institutional arrangements for a whole geographical area.

Security was the main force of regionalisation during the Cold War, and still is in many aspects. But trade gained momentum with the inception of the World Trade Organisation in the nineties, as we have already seen, involving education in indirect but relevant ways. Education is certainly undergoing a regional push in Europe and Latin America. In the view of analysts

(Jayasuryia, 2008), the main interest that leads political players to engage in these endeavours has to do with regulation. An international agreement on weaponry and commercial regimes, for instance, is much easier to enforce than a national law. This regulation is also trickling down to an array of arrangements about private and public provision of services, which are experiencing the consequences of remote decisions aimed at fostering regional uniformity.

Higher education may posit one of the most notorious examples of regulatory regionalism. Since 1999 a policy network is promoting the common accreditation of bachelor's and master's degrees as well as competences and learning outcomes in the European Higher Education Area. The limits of this initiative stretch well beyond the European Union into Central Asia and, precisely, reach Latin America. Many Latin American governments receive an increasing wave of suggestions to adapt their higher education institutions to the European pattern so that their students have an alternative to the traditional foreign reference, namely US universities. Although the mainstream discourse emphasizes cooperation and mutual learning, in the end a key motivation of European authorities is gaining 'markets' for the graduate education delivered by their main universities (Verger and Herms, 2010).

This article focuses on regionalism concerning educational planning in Europe and Latin America. Regional educational plans were launched in each case during the last decade. Both of them consist of strategic plans that set the same objectives for all the involved states, although particular governments are allowed to advance towards this direction in their own way. The European summit convened in Lisbon in 2001 produced a plan of this kind with a deadline for evaluation set for 2010. The main educational items at stake were early school leaving and graduation at the tertiary level. In Latin America the Organisation of Ibero American States designed a very similar plan between 2008 and 2010. Currently, the second phase of the European plan and the new Latin American one are scheduled to be evaluated by 2020.

According to international relations scholars, the relationship between Europe and Latin America illustrates a massive phenomenon of policy diffusion. They have convincingly shown that the EU considers the Latin American MERCOSUR as its emulator, and is committed to providing consultancy services so that the authorities from these countries 'learn' how to lead regional integration (Grugel, 2004).

Educational policy borrowing and transfer is not at all a particularity of this inter-regional dialogue. Rather, the economics and the politics of these processes have been observed in many geographical areas (Steiner- Khamsi, 2012). The economic dimension arises from the conditioning of aid and investment to the adoption of certain reforms. Unsurprisingly, the European approach to Latin American affairs is quite close to the interest to build procurement schemes in those countries and transform them into preferential markets for European industries. But the political dimension depends on the interplay of imaginary, often biased accounts of a given country which are projected over the reality and the agenda of other countries. In this vein, international regionalisation is relying on the ontological assumptions made by the "theories of change" that lead these grand, international, strategic educational plans (Dale, 2009).

Therefore, a comparative analysis of educational regionalisation in these two continents has to focus on the involved political players and the knowledge they retrieve, and produce, in order to pursue their interests in the context of these plans. On the one hand, according to the state of the art of research on globalisation, research should not only think on governments and political parties winning elections but also on the array of agents who are the protagonists of the

aforementioned global transformations. On the other hand, it is extremely important to look at the knowledge they use when claiming that their educational plans are going to transform educational practices. In a nutshell, these claims respond to crucial political implications, provide new instruments to manage the time horizons, and finally, will eventually become the baseline of any realistic evaluation in the middle term.

### **Education and Europeanisation**

Although the debate on European education was already alive in the nineties, its authorities did not decide to attribute full educational competencies to EU institutions. At that time the Maastricht Treaty only allowed it to steer coordination between member states. Afterwards, the EU is based on a complex institutional structure where decisions are made by ministerial summits (the European Council), a kind of government (the European Commission) and the Parliament (Grugel, 2004).

In 2001 the Lisbon Council endowed the Union with competencies to manage the Open Method of Coordination (OMC). OMC consists of a strategic plan that defines general objectives concerning competitiveness and social cohesion, which are later concretised in specific goals, statistical indicators and benchmarks. Each member state is free to follow its own pathway to achieve the goal, but the government is committed to yield scores above the threshold established by the benchmarks. In 2010 the goals were not clearly met, but the strategy was not sidelined nevertheless. On the contrary, the new 2020 Strategy was launched following the same methodology. The old and the new objectives pointed at the labour market, poverty alleviation, energy saving, the development of IT and education (Pépin, 2011).

Thus, the European Union enacts an education policy from two scales of decision-making, one of them located within the state but another one located above the state. The political agreement to adopt the OMC was the outcome of the common Social- Democratic ideology of several contemporary governments (Blair, Jospin, Schröder), who aimed at stressing the social dimension of their policies addressed to strengthen the knowledge economy and the knowledge society, that is, competitiveness and social cohesion. The reduction of early school leaving became a central objective because they wanted to favour vulnerable social groups at the same time as to foster economic growth based on economic sectors that produce a high value added. But when these governments lost the elections in both France and Germany a few years later, a further review of the OMC easily downplayed this objective and underscored the importance of graduation in higher education. Certainly the general strategy was advancing in these two directions, but the later became the eventual priority. So, competitiveness became slightly more important than social cohesion (Gornitzka, 2005, 2006).

The OMC has been a burning issue in professional and technical meetings and conferences, but not so salient for everyday politics in the member states. Governments and opposition parties have generally addressed it for short-term movements rather than ambitious plans. However, commentators have found out an effect of the OMC in the making of a common speech and imaginary of what Europe is doing. This type of cultural convergence at the expert level, which is carefully crafted by means of complex alliances between governments and international organisations, has been labelled as Europeanisation (Radaelli, 2007).

The recent alliance between the Union and the OECD has broadened up the array of political players who are involved in European politics. Besides the national governments who led



the process a decade ago, the emerging pattern of interaction responds to the role of these two international organisations. While the EU is interested in building new capacity to intervene in a policy area its competencies do not fully recognise, the OECD wants to disseminate and justify its database of expert knowledge grounded on the data and the diagnoses elaborated by means of the many analyses of the standard tests produced by the Programme for International Student Assessment (PISA). Unsurprisingly, since many EU countries pay for these data, the OECD gains advantage if it can collaborate in translating its results to the terms of effective measures. This cooperation features "governance through numbers", which strongly relies on monitoring and evaluation, ultimately retrieving OECD indicators for this task. In some countries this method conveys a market-driven approach on the grounds that single institutions compete with their neighbouring schools to be more appealing for students. In the official view, this competition is eventually going to improve quality by means of competition between teachers who are aware of their students' academic learning compared to the learning of students who are enrolled in competitor schools. The role of government consists of providing guarantees that all these suppliers of educational services comply with a set of standards and conditions, often by outsourcing inspection to private consultancy firms (Grek et al, 2009; Ozga, 2009).

A handful of observations informs of the initial consequences of the OMC for national and sub-national educational systems. For instance, whereas in Finland it has been helpful for the supporters of decentralisation towards municipalities, in England it has been instrumental to the promoters of centralisation and restriction of municipal competencies in education (Grek et al, 2009). That is to say, the common European framework is filtered by means of different readings in varied political contexts. On the other hand, some governments of middle-sized member states such as Austria and the Netherlands have approved their own educational plan that retrieves some educational objectives of the agenda accorded in Lisbon in 2001 (Gornitzka, 2005, 2006). Simultaneously, a few national minorities have drawn on this political tool so as to assert their difference by means of their own educational (sometimes, social) plan. This decision has been quite remarkable where the government of the EU member state had not designed its own plan: these are the cases of Catalonia (Engel, 2008), Flanders (Simons, 2007) and Scotland (Amott & Ozga, 2010).

The Commission has settled a peer-review scheme of practices in a variety of fields, many of them related to education (Lange & Alexiadou, 2010). Recent research on this mechanism has spelled out the intricate diversity of the involved processes. Thus, "surface learning" has taken place when governments have simply paid lip service to the European policy. But "competitive learning" has been enacted in many cases in order to catch up with the benchmark. "Imperialist learning" has also been at stake, not least in the transfer of the dual system of vocational education and training. And "mutual learning" by means of bidirectional dialogue has also conveyed the adoption of new ideas in a few cases. It is plausible to notice that this variety of interaction unveils the complexity of cognitive Europeanisation.

In contrast with this weak pattern of policy diffusion, the emphasis on the "theory of change" or the "programme ontology" has been pervasive. The Lisbon Agenda eventually fashioned a space of education policy whose core was the widespread assumption of a common "ontology" in spite of disparity of understanding and particular implications (Dale, 2009). The new 2020 Strategy is even more explicit about that, to the extent that it states a "theory" of the expected changes. Notably, the main message of its website argues that the 2020 Strategy will trigger

smart, inclusive and sustainable growth. Then, it provides a detailed account of the alleged processes that produce these types of growth. And finally, the main programmes and initiatives are presented as a logical corollary of this theory (European Commission, 2010).

In conclusion, Europeanisation is a political terrain with a strong cognitive component. The main players are the governments of member states, OECD, EU and some regional governments. Although some influential governments started the Open Method of Coordination (OMC), the latter development of this policy instrument has underpinned the leadership of OECD and the Commission inasmuch as international agencies have prevailed over national authorities. This political outcome has to do with the very institutional design of the EU, because the Commission is gaining influence in a variety of areas where governments lack some important capacities. It would be very difficult for single states to produce a comparative assessment of their educational outcomes, and review its current policies on these grounds. They would have to use the US as an inevitable reference. However, the very consolidation of the OMC has homogenised mainstream opinions on what diagnoses, objectives, practices and data are appropriate. Thus, the main players have been using both political and cognitive instruments so as to pursue their interests.

#### **Education for All, OEI Education for All and the National Educational Plan in Brazil**

Worldwide, all governments are committed to Education for All (EFA) targets since 1990. Although the first decade of this global programme did not yield satisfactory results, in 2000 it was re-enacted in order to make sure that specific benchmarks were effective by 2015. A consortium of international donors is in charge, and the siege of both the coordination and the monitoring teams is located in the UNESCO building in Paris. In essence, EFA aims at strengthening early childhood care and education, guaranteeing that all children enrol in basic education and finish the corresponding programmes, extending lifelong learning to everybody, increasing adult literacy by 50% –mostly, including women in this expansion —, achieving gender parity in primary and secondary enrolment, and finally, improving educational quality (UNESCO, 2012).

Simultaneously, in 2000 a group of international NGOs created the Global Campaign for Education (GCE), who has been monitoring effective education and challenging delays since then. The GCE has launched many campaigns addressing public awareness, denouncing governmental inaction in some countries, and raising funds for the coalitions of civil society organisations that constitute its national members. In this vein, it has applied to the funds delivered by the main donors in order to promote the building of new coalitions in many low-development countries (CME, 2009). In the same way as the OMC in Europe, this initiative has fostered the rhetorical construction of an easy-to-compare world insofar as EFA has eventually led all governments to compare with other countries according to their scores in the set of indicators. Unlike the EU Lisbon and 2020 agendas, the civil society is pretty much visible in EFA. While European policies are assessed in parliaments, where representatives are accountable to their constituency and must respond to the claims made by associations, EFA is under the continuous monitoring produced by regular global reports that both donors and the civil society use in order to push for their own priorities.

Doubtless, EFA is an inevitable challenge for the governments of low-development countries, normally located in Southern Asia and Sub-Saharan Africa. However, intermediate countries like Latin American states have to deal with EFA goals too, not least because despite their better

levels of human development huge inequalities severely damage the well-being of large sections of their population. Remarkably, a great number of comparative analyses have concluded that Latin America is the region where inequality is the most extreme in the world (Filgueira, 2009).

Three different political projects push for introducing education in quite disparate agendas of Latin American integration or regionalisation. The Bolivarian Alliance for the Peoples of Our America is one of them (ALBA, 2011). Led by the government of Venezuela, allied to Bolivia, Cuba, Ecuador, Nicaragua (for a while) and some Caribbean states, it openly challenges the traditional hegemony of the US in the continent, and looks for new cooperative advantages based on exchanging oil for services and professional aid. In education, so far it has mostly focused on eradicating illiteracy and promoting a grassroots-based concept of higher education. Another one is PREAL, the Partnership for Educational Revitalisation in the Americas (PREAL & Fundação Lemann, 2009), supported by USAID and the World Bank. PREAL reunites expert committees to publish regular reports of countries and regions within countries grounded on the set of indicators that the very experts of PREAL have established. Roughly speaking, its philosophy is quite confident in the crucial value of school effectiveness for educational change. The Educational Goals of the Ibero American States Organisation (OEI, 2010) is the third project of educational regionalisation. The main support of the OEI Educational Goals has been provided by both the Spanish and the Portuguese official aid to development. The Educational Goals foresees that all the countries, in addition to EFA goals, by 2021 will have experienced a dramatic increase of enrolment and graduation in secondary and higher education as well as vocational education and training. A continuous increase of investment, within more accurate institutional designs, and the making of a regional space of research are included too.

Notably, all these three projects want to foster educational development beyond EFA goals. But UNESCO and OEI have joined forces in order to coordinate their respective plans. Their main agreement lies in their shared view of the basic needs and priorities. This is a common "theory of change". Mostly, UNESCO expects that the poor balance of the first decade of EFA will be overcome if primary education benefits from a sounder early childhood care and education, and a stronger higher education provides schools with better trained teachers (EFA Global Monitoring Report, 2010). As to OEI, this regional agency not only relies on synergies between educational sectors –primary, secondary and tertiary education— but also thinks that a feedback effect between social and economic policies is likely to provide an even stronger contribution to education (OEI, 2010). Clearly, these two perspectives of the potential of education to trigger real change do not coincide with PREAL's "theory of change", since this one emphasizes the causal role of best practices in teaching and managing at the level of single schools, instead of societal synergies emerging from a better alignment of the main educational cycles and a better matching of education and other public policies (PREAL & Fundação Lemann, 2009).

In Brazil, the drafting and further discussion of the National Educational Plan (PNE, in Portuguese) has reunited a broad political coalition where varied actors participate, each of them introducing its own nuance to a general discourse. Some key participants are the provincial and local governments, the main teachers' union and the national coalition of the GCE as well as the All for Education campaign (TPE, in Portuguese). TPE has been launched by a network of corporations involved in initiatives of social responsibility and closely associated with PREAL. The general agreement does not hide discrepancy and conflict between the Federal govern-



ment and the union, on the one hand, and some provincial governments and TPE, on the other hand, concerning the tighter or looser coupling of teachers' wage with school performance. Due to the victory of the Workers Party in the last three presidential elections, the Federal government stands for a wide understanding of the right to education as well as an ambitious reading of the constitutional requirement to pass a national educational plan (PNE) each decade. Thus, broader and narrower readings of the outcomes of the education system divide both parties. Within the frame of a general agreement, the union is the most visible representative of the broader reading (and a looser link between teachers' wage and school performance), while TPE is the most explicit speaker in favour of the narrower reading (and a tighter link between teachers' wage and school performance).

Nonetheless, both the final document of the consultative conventions that have discussed the PNE (CONAE, 2010) and the legal wording of the very PNE (Câmara dos Deputados BR, 2011) reproduce quite an analogous "theory of change" compared to UNESCO and OEI. Moreover, the initiative that piloted the current PNE between 2007 and 2010 (Ministério de Educação, 2008) assumed the same tenets with regards to societal synergies (CONAE, 2010). Actually, each of these three political players posits an even wider notion of these synergies. Whereas UNESCO looks at the leverages of primary enrolment (e. g. stronger foundations in early childhood education, better trained teachers), OEI hypothesizes a positive contribution of each educational level to the other ones in the context of a positive matching of economic and social policies. Accordingly, the promoters of the Brazilian PNE rely on the leverages of primary education, a better matching between policies, and significantly, a fiscal reform that guarantees a substantial investment in education (CONAE, 2010).

In the same way as inter-agency cooperation has been enacted in both cases, between UNESCO and OEI in Latin America, and between the EU and OECD in Europe, sub-national governments play a role in Brazil, with some similarity to sub-national governments in the EU member states. In Brazil, discrepancy between certain provincial states and the Federation unveils the relevance of educational policy-making. Besides teachers' wage, the deployment of their own plans is also an issue for such powerful governments as the ones of São Paulo (OECD, 2010) and Minas Gerais (SEDUC MG, 2012). In addition, the Federal plan has opened new spaces at the local level, where civil society organisations have managed to participate in the regulation of education (Arretche, 2010; Ramos & Giorgi, 2011). These are particularly relevant processes for two reasons. First, the Brazilian constitution endows the Federation, provincial states and municipalities with important competencies in education. And secondly, although many commentators feared that municipalities were too weak to fulfil their responsibility at the moment, and some of them are very poor to make a difference in the local conditions of schooling, eventually educational plans have become a new opportunity for reinforcing the democratic debate on local policy-making.

In conclusion, a complex array of political players has a say in Latin American education. The Brazilian example illustrates the heterogeneity of actors to the extent that two alliances have been built, and their interaction is based on either consensus or conflict depending on the issue. Thus, UNESCO, OEI, the Federal government, some provinces and municipalities, the national branch of the Global Campaign for Education, and the teachers' union stand for a policy aimed at guaranteeing a wide notion of the right to education to everybody. In contrast, PREAL, some provincial and municipal governments, and TPE vindicate that academic performance must

be the key priority, ahead of other goals, and claim that school-based improvement is capable to render a significant increase of academic standards. International organisations, national and sub-national governments, transnational advocacy networks and unions are engaged with these initiatives and campaigns.

Conflict is also translated to the terms of intellectual disagreement with regards to the valid “theory of change”. In fact, the first party argues that societal synergies have a strong potential, but the second one thinks that school-based change is more promising. Although the explicit debate between these views is less noticeable than the struggle between opposed political interests, it is quite reasonable to observe that knowledge also plays this role in education policy-making.

### **Discussion: agents and knowledge in the global educational agenda**

The analysis of the commonalities and variations between the description of European and Latin American regionalisms may be insightful in order to discuss the role of agents and knowledge in the global educational agenda. Comparing two distinct case studies is a significant method to hypothesize to what extent their converging features are relevant. This exercise requires a general statement about the underlying mechanisms, and a further analysis of the similar and different traits identified in the cases (Mahoney, 2004).

Here, the underlying mechanism has to do with the making of political forces and the competition, conflict and agreement between them. This is quite an unorthodox point with regard to the “technical approach” to policy-making (Dale, 2005). Such approach basically assumes that political decisions are rational choices between means adopted to meet a given end. From this view, educational planning starts with a well-grounded diagnosis of the observed problems, scans the available solutions within the technical stock of best practices, chooses the most appropriate solutions to tackle those problems, and afterwards evaluates whether these solutions worked. If they did, this is a new best practice that can be applied elsewhere.

The focus on political forces and their interaction has emerged from the growing evidence of ‘irrationality’ in the technical procedures of educational (and generally speaking, public) policy-making. Diagnoses are seldom the outcome of neutral and self-evident knowledge. The repertoire of solutions is conveyed by discourses entailing both scientific and political messages. Therefore, the final choice is far from objective and evaluation cannot proceed along clear lines of what works and what doesn’t. It is crucial to investigate the power relations whereby a given policy finally prevails amidst the interplay between political forces (Dale, 2005; Pawson, 2006). It would not be realistic to figure out a portrait of policy-making without an accurate account of this phenomenon.

Moreover, this account of knowledge provides a set of complex and qualified information that all the parties can use in order to pursue their interests. Although I am not going to discuss a further point in this article, let me simply state it. If the portraits of political processes rely on a rich informational basis, they are also making a relevant contribution to deliberative decision-making, because their very complexity induces all the parties to pay attention to qualified opinions.

In this vein, an initial conclusion of the former comparative description of educational regionalism in Europe and Latin America must highlight the presence of political actors who operate at varying geographical scales. Geographical scales are interactive spaces, outcomes of social agency, that pattern local, national and global space, and mostly, imprint qualitative differences

in social phenomena. Thus, any discourse on a given political measure in education normally re-contextualises previous knowledge about educational change in a local context; besides, it may either underpin or challenge the prevailing forces at the national level. Furthermore, the growing interest of UNESCO, the World Bank, the OECD and other international organisations in education has created a new social phenomenon, the global educational agenda, which affects developments at the other levels. In addition, an analysis which is sensitive to scales cannot assume a hierarchy between them, but has to notice the continuous interaction between the undergoing processes at each level (Robertson & Dale, 2008).

In Europe, the EU, OECD, the national and the sub-national governments have been the key political actors in the educational arena. In Latin America, they have been UNESCO, OEI, PREAL, the Global Campaign of Education and an emerging power such as Brazil, with its unions and social movements and its regional and municipal sub-national governments. Thus, this array of agents includes international organisations, governments and civil society organisations.

Most of these actors interact with other ones who are operating at another geographical scale. For instance, in the EU the Lange & Alexiadou's (2010) typology of policy learning reveals complex interaction between governments and the Commission. And national and sub-national planning informs of unexpected effects in politics within member states. In Latin America, cross-scale interaction is even more remarkable, since two opposite coalitions have been built through this interaction. On the one hand, UNESCO, OEI, the Brazilian Federal government and the national branch of the GCE constitute a coalition of international organisations, governments and associations in favour of a broad understanding of the right to education. On the other hand, PREAL, some regional governments (e. g. Sao Paulo) and All for Education also constitute an analogous coalition, this one standing for a precise view of improvement in performance and school effectiveness.

The former exercise also suggests a second conclusion concerning knowledge. Altogether with an account of the political forces involved in regionalism, the former comparative exercise also renders an interpretive sociology of the ideas posited by the parties. Notably, the European reliance on synergies between inclusive, smart and sustainable growth, the UNESCO, OEI and Brazilian causal belief in positive contributions of some educational sectors and public policies to the development of primary education, and finally, the assumptions of PREAL and TPE about school effectiveness are "theories of change" which are embedded in their political proposals. With these theories, these political actors can think of connections between their diagnoses, their initiatives and the possible results of evaluation. They can also disseminate their ideas on the grounds of the alleged validity and truthfulness of their diagnosis.

Needless to say, each "theory of change" must be assessed on its own terms, clarifying the main concepts, looking at salient information, and producing conclusions underpinned by a sound methodology. That is to say, I am not going to point out neither favourable nor critical substantive statements in a quick, makeshift discussion. This is not the object of the article.

My main observation has to do with a commonplace in the sociology of knowledge, namely the salient distinction between the epistemic and the social interests of people engaged in knowledge production and dissemination. The former have to do with the consistency and the validity of knowledge, and the latter have to do with the use of knowledge as an instrument for other goals (Horowitz, 1968; Barnes et al, 1996; Bernstein, 1999). Researchers, technicians, politicians, social movements and the public opinion are normally interested in knowledge in

these two ways. An accurate sociological analysis must take both dimensions into account in order to portray the complexity of the social world regardless of the different specialties of science that may be the object of this sociological analysis. However, it cannot collapse the validity and the social origin of knowledge in the same concepts and statements. Whereas the former depends of methodological criteria, the latter is the outcome of social analysis. In this article I am not discussing the validity of the "theories of change" associated with educational plans in Europe and Latin America but presenting this kind of sociological analysis of the social origin of these theories.

Thus, it makes sense to realise the growing importance of expert knowledge in the making, implementation and evaluation of education policies. Although this is hardly a novelty, it is quite noticeable that the complex pattern of political interaction is currently reflected in an also complex pattern of interaction between academic schools of thought and between these schools and political forces. Regardless of the internal consistence of their production, it is necessary to be aware of the epistemic relations that the array of political forces involved in educational regionalism enact. Education policy has always enacted epistemic relations, for instance, concerning the value of pedagogies or the importance of primary and vocational education. But nowadays these relations are not only being established nationally or globally, but regionally too.

In the same way as political alliances are aligned with regard to burning issues, academic schools concentrate their teaching and publishing in different institutions and journals. Consensus may emerge to the extent that researchers draw on varied sources, but conflict is also noticeable when different journals convey diverging opinions. Actually, the broad notion of the right to education is expressed in the European goal on social cohesion, the Ibero American goals on equity, and normally published in journals specialised in the societal dimension of education. On the contrary, a number of OECD policy briefs and the whole of PREAL guidelines stress the strict focus on performance, which is normally researched by authors who publish on journals specialised on educational change and school effectiveness. The changing relationships between the supporters of these discourses are therefore correlative with the changing political equilibrium in national, regional and global politics.

Therefore, the former findings would be incomplete if I did not stress that social and epistemic relations are relevant to make sense of educational regionalism. Nor these conclusions would be exhaustive if they did not report on their variation across regional scales in different parts of the world.

### Conclusion

The making of the educational agenda across heterogeneous but related scales of decision-making has certainly emphasized the complexity of the issues involved in education policy. Not only political actors are diverse with regard to their ideology but also with regard to their geographical location and their political instruments. In addition, these political forces aim at implementing different policies which are allegedly underpinned by different "theories of change", each of them containing its own methodological assumptions.

Research on these policies is crucial to the understanding of the current social changes. The national space is the most plausible unit of analysis any longer, because this space is neither featured by internal consistence nor clearly distinct from external forces. The global educational agenda is simultaneously made and enacted within and above the states, thus challenging the



consistency of national societies and the sovereignty of states that had traditionally defined 'national education'.

A focus on the involved knowledge the political players draw in so as to pursue their interests may also render a helpful result for those interested in promoting a more deliberative political debate. In fact, complexity posits a huge challenge to this endeavour. However, a new more transparent kind of deliberative debates could be opened if policy studies might spell out both the political and the scientific ideas that are at stake, why they are relevant, how they are observed, and to what extent they contributed to the effective impacts of policies.

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