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## The Role of PISA in Shaping Hegemonic Educational Discourses, Policies and Practices: the case of Spain

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**ABSTRACT** The aim of this article is to analyse the direct and indirect effects that PISA generates in the orientation of educational policies and reforms in Spain and the ways in which PISA data and results are used in political discourses, at both national and sub-national levels. The main hypothesis of the article is that PISA results have played a key role in shaping Spanish hegemonic educational discourses, policies and practices, setting the framework of what is *thinkable* and *doable* in education. To explore this hypothesis, the article identifies two main mechanisms that have become a regular recourse in national educational policy discourse – selectivity and instrumentalisation – providing several examples of their use in recent Spanish education reforms.

### Introduction

External evaluations have become a common feature of education systems, and in recent decades international evaluation programmes have proliferated. These programmes have made it possible to compare the realities of different education systems, to develop diagnoses of their problems and to propose specific reforms in order to achieve global standards for educational results. In order to understand the emergence and expansion of these systems and their role in shaping new global educational trends, it is crucial to take into account the effects of globalisation on education, and in particular the existence of new mechanisms of external influence on national education policies.

In our understanding, the main mechanism of influence leading from external evaluations of educational systems is what Roger Dale (1999) defines as ‘standardization’. The central character of this mechanism lies in the fact that the homogeneity of education systems derives not from an external imposition of international agencies but from a voluntary process of national governments participating in international evaluation systems. Although this process is formally voluntary, no country wishes to be excluded from the evaluation process. The reasons behind this willingness are diverse – to strengthen the effectiveness of national education policy, to know one’s relative position compared with other education systems, to gain access to international funding or simply to respond to messages of the ‘expert’ knowledge and expertise.

Undoubtedly, the best example of this mechanism is the Programme for International Student Assessment (PISA) project launched by the Organisation for Economic Co-operation and Development (OECD) in 2000. PISA has had greater public impact than any previous international assessment programme and has acquired increasing legitimacy to shape discourses, policies and practices, both nationally and globally. Its hegemonic character can be seen by checking the increasing number of countries that have joined PISA in every edition. This number has risen from the 43 countries that participated in the 2000 edition to the 65 countries included in 2012 (OECD, n.d.). An increasing number of non-OECD countries, and more regions or sub-nations within

OECD countries, have voluntarily joined the most prominent system of student assessment in the world.

The aim of this article is to analyse the direct and indirect effects that PISA generates in the orientation of educational policies and reforms in Spain and the ways in which PISA data and results are used in political discourse, at both national and sub-national levels. Spain is an interesting case due to the speed of its social and economic transformation over the past thirty years. After forty years of Franco's dictatorship, democracy arrived in Spain in 1975, and with it the building of a democratic, universal public education system, and the guarantee of the right of citizens to education by public authorities. The new system had to be constructed in a context of conflicting education interests, between the mainly private Catholic education sector – which had historically benefited from indiscriminate public subsidies – and those emerging sectors on the left that aimed to build an egalitarian public education system.

At the same time, there were significant struggles around identity and language issues in the historical regions of Spain, such as Catalonia and the Basque Country. Pressures for decentralisation and establishment of independent education systems have characterised the politics of education in the country for the last few decades. Interestingly, the culmination of decentralisation in the 2000s has coincided with the consolidation of PISA as a prominent tool for evaluating educational competences. Although Spain participates as a country (and as an OECD member), it is noteworthy that 14 out of 17 Autonomous Communities participated in the 2009 edition, with significant sampling for each of the regions. PISA is therefore used not only as a tool to position Spain in the international context of education systems, but also as an internal reference to compare performance among different regions in Spain.

It is in light of these two dimensions that discourses and policies related to PISA have to be understood and analysed in Spain. To this end, the article is divided into two main sections. The first differentiates between direct and indirect effects of PISA and provides some elements of the context to understand the use of PISA as a 'hegemonic tool' in certain educational reforms. The second section provides examples of selective and instrumental uses of PISA data in the recent Spanish education policy, showing the interplay between standardisation mechanisms and contextual uses of PISA data.

### **Direct and Indirect Effects of PISA in Spanish Educational Policies**

External evaluation mechanisms and especially PISA have had a visible impact in Spain, as elsewhere in Europe. In order to understand the impact of PISA on national education policies and practices, it is crucial to differentiate between direct and indirect effects (Dale, 1999). The direct effects of PISA (or of any other mechanism of standardisation) are visible in those policies or programmes that are a direct consequence of the country's performance in the evaluation process or that derive from OECD policy advice and recommendations linked to PISA. Indirect effects, on the other hand, can be observed in the use of PISA as a 'generic framework' to justify a set of national education policies and programmes, even if they are neither a direct consequence of PISA results nor the result of the OECD recommendations. That is, indirect effects of PISA are more diffuse; national governments may invoke the programme in a more generic form – without referring to specific results – in order to legitimate new policies or programmes.

There is no question that direct and indirect effects of PISA are visible in recent Spanish education policy. For example, the Spanish and the Catalan governments have announced ambitious education programmes to promote reading habits among students (see e.g. Spanish National Plan to Promote Reading [Ministry of Education, Culture and Sport, n.d.] or the Catalan programs to encourage reading habits of young people [Generalitat de Catalunya, n.d.], have promoted school autonomy in recent education laws (LOE, 2006; LEC, 2009) or have boosted ICT programmes in schools. Though all of these programmes are not necessarily a unique reaction to PISA results, there is no doubt that their development and, particularly, the importance that the government gives to them in the media are clear signs of some of the effects of PISA in shaping education policy.

As an example, although Catalonia is not in a bad position in the PISA international scale of reading comprehension (19th out of 66 countries), the Catalan Ministry of Education launched a

Reading National Plan to improve reading skills. Despite this average position in PISA, other national evaluation tests show that one out of four Catalan students do not acquire minimum reading skills after primary education, and 14% of students do not understand what they read after completing compulsory secondary education. The new National Plan includes measures such as schools ensuring that students read at least 25 books per year (Casabella, 2011).

At the same time, indirect effects, although more implicit, can also be detected when the government makes use of PISA data to support specific policies and programmes as part of its education policy agenda. In this case, what the government does is to rely on PISA data to justify or reinforce certain decisions. PISA serves to legitimate specific policies. As we will see, recent political proposals made by the conservative Spanish Popular Party on early school tracking or even recent cuts in education budgets rely on PISA data to demonstrate the virtues of these decisions. In the recent Catalan elections, for instance, some political parties included references to PISA to support their education policy measures. In the 2008 electoral programme, the nationalist conservative party (CIU) included 'the need to boost continuous evaluation of the system to ensure educational excellence and to guarantee the improvement of the negative performance evidenced by international programmes of education quality assessment (PISA)' (CIU, 2008).

Moreover, in order to understand the direct and indirect effects of PISA in the Spanish education policy, it is important to refer to the socioeconomic and strategic position of Spain in the regional architecture of the European Union (EU). Due to its semi-peripheral (or even peripheral) position within the EU, the educational reforms and proposals of Spanish national and regional governments are commonly presented as policies to improve the position of the country within the European context, in both educational and socioeconomic terms. In fact, the Spanish official discourse constantly underlines the advantages of the Europeanisation as a vehicle for economic and social development. In order to become 'real Europeans', it is crucial to follow the educational reforms already implemented by other European countries which show better performance on international assessments. Therefore, the 'image of the centre', as indicated by Boaventura de Sousa Santos (1990), is a rhetorical resource to fix goals and justify some political decisions.

At the same time, following Steiner-Khamsi (2004), we would argue that in a context of globalisation, national educational reforms increasingly rely on external forms of legitimation. In this way, results of other European countries in PISA rankings are used to legitimate specific Spanish educational reforms and to present them in a non-controversial way. In that sense, PISA and other international evaluations provide the necessary evidence to frame educational reforms exclusively in technical terms, thereby avoiding political debate around decision-making. Specific educational reforms are presented as the best way to improve students' abilities and skills to face the challenges imposed by the knowledge economy in an increasingly competitive labour market. Thus, particular political options are presented in the name of the general national interest and in the name of the country's development requirements. All of these elements allow us to say that decision makers have used PISA to construct new forms of hegemony (Jessop, 2008) in education in the Spanish educational context.

As an example, the current Spanish Minister of Education, José Ignacio Wert, in the context of the publication of the first draft of a new Education Reform Act (LOMCE), made the following statement: 'We are in front of a reform that looks abroad, that is sensible, gradual, instrumental (it will improve employment), not ideological at all' (Grau, 2012). In exactly the same vein, one of the spokeswomen of the Popular Party made the following statement to justify the new model of evaluation included in the Law project:

We need to reform our model in order to have an Education System at the cutting edge of our country ... PISA results shame us due to the high rates of school failure and early school leaving ... [Our proposal] is not ideological at all, it is very rational and it can become one of the best instruments to improve education. We are talking about the new systems of evaluation. (Popular Party, 2012)

These are, without a doubt, clear examples of framing and justifying education policies and reforms exclusively in technical and rational terms, avoiding the political dimensions embedded in design and implementation.

Moreover, it is important to highlight that in the Spanish context, PISA has been commonly used as a weapon between political parties. The interpretation of PISA data through specific

ideological views has been used, for example, to criticise former educational reforms approved by other political parties, while any improvements in PISA results are cited as endorsement of one's own education policies. We agree with Bolivar (2010), who argues that Spain has been characterised by a high politicisation of PISA data, instead of using data as a source to take rational decisions concerning public action in education.

Using again the example of the current debate on the new Education Reform Act (ERA) (LOMCE), the Popular Party (PP) justifies its enactment as a way to end the 'demonstrated' failure of the educational structure and principles established by the LOGSE (the ERA approved by the Socialist Party in 1990). According to the PP, the previous educational reforms applied by the Socialist Party consolidated a mediocre educational system with low levels of excellence. The PP assumes that PISA reports clearly demonstrate the failure of these reforms. In fact, several public statements made by MPs of the PP refer to the changes that the new ERA will bring by suppressing two main principles of the LOGSE model: comprehensiveness and the elimination of the grade repetition. From the perspective of the PP, these two principles have clearly demonstrated their failure to ensure the excellence of the education system (Forcada, 2011). This claim was among those made in the key electoral speeches and promises before the PP won in the national elections in 2011.

### **The Selective Use of PISA Data in Spanish Education Policy**

Both direct and indirect effects are characterised by two mechanisms that have become a regular resource in educational policy discourse: selectivity and instrumentalisation. Selectivity appears when policy discourses or practices discriminate among possible interpretation of PISA results. Thus, some aspects are stressed as evidence-based policy while others are ignored or neglected. Instrumentalisation means a deliberate and biased interpretation of PISA results. That is, policy discourses make PISA speak for something that is not sufficiently proven or even not demonstrated at all. First and foremost, policy makers tend to select PISA results that are visibly useful in developing their agenda. Although complete analyses of PISA developed by the Spanish Ministry of Education itself (MECD, 2010) and by academics and researchers (Ferrer et al, 2011) show a wide range of educational relationships and a potential number of educational political priorities, policy makers tend to be extremely selective when choosing among PISA results. They do so especially by stressing specific relationships between certain PISA variables while ignoring significant relationships between others.

Interestingly, the educational policy discourse tends to highlight only those dimensions of the PISA analysis that help develop specific policies. As such, selectivity goes hand in hand with silences and omissions of other significant results or trend patterns that derive from the comparative analysis of education systems. A clear example of this is the 'country selection' made by the government to justify specific policies. Finland is of course the 'favourite' country to provide examples of innovations in teaching practice, participation and classroom organisation. Thus, despite the diverse characteristics of the Finnish education system, Finnish education policy is only taken as providing examples of teaching practice, school autonomy or classroom organisation (MECD, 2012). Other aspects, such as teacher selection, equity in access, individual attention to children with special needs and especially school social composition, do not form part of the picture. The strong relationship between equity and performance in the Finnish education system is systematically ignored. Equity only appears to show that interschool variance in Spain is closer to that of Finland. However, equity is never understood as a causal factor of performance (MECD, 2010, p. 87).

The second main mechanism used in the education policy discourse is instrumentalisation. In this case, unproven causal mechanisms or even clearly biased interpretations of PISA data are used to justify specific policies and programmes, such as some of the measures included in the draft for the new ERA (LOMCE). Interestingly, the Spanish Minister of Education recently made a public declaration stating that those systems with early tracking were the best performers in PISA. Despite the lack of a single clear pattern in the relationship between tracking and performance, the minister distorted PISA data to find arguments for justifying a potential educational reform to extend the Baccalaureate and to reduce compulsory secondary education. Although not one of the best PISA

performers, Germany was taken as the best example of early tracking (Muñoz, 2012). All the potential effects on school segregation and on the differentiation of educational careers that research shows (Alegre & Ferrer, 2010) are completely ignored, while PISA data are clearly manipulated for a clear political purpose.

A second example of the clear instrumentalisation of PISA data has to do with the absence of a relationship between public expenditure and performance. PISA analyses do not show a consistent pattern of relationship between expenditure and results. In fact, comparative analyses rarely show any consistent pattern between these two variables in the countries examined. In that sense, educational expenditure is one of these weak or non-existent predictors. However, the difficulty of finding a consistent pattern between expenditures and performance does not imply that expenditures should be completely ignored in understanding differences in the quality of education systems. Unfortunately, the lack of a consistent correlation has automatically been taken as proof of an *inverse* relationship between expenditures and quality. This discursive construction is used to justify significant reductions in public expenditures on education. Political discourses and even some think tanks insist on the weak relationship between public expenditures and educational quality. A recent manifesto approved by the Foundation for the Study of Applied Economics (FEDEA) concludes:

A reform to improve education results in Spain has been necessary for a long time. This objective cannot be exclusively achieved by increasing public expenditure, as our recent history demonstrates. Increasing public expenditure did not improve the quality of the education system, measured by results in international standardised tests. (FEDEA, 2012, p. 7)

It is argued that current cuts will not affect quality, and PISA is used as evidence, though it is unlikely that any PISA expert would uphold such a view (Cosascorrientes, 2012). Interestingly, these and similar statements are made without specific reference to evidence. In fact, the assumed non-existent relationship cannot be checked simply because per capita increases in educational expenditure have not been highly significant during the period in which PISA has been implemented in Spain. On the contrary, a recent publication analysing PISA results for the 2009 edition states that although it is true that there is not a consistent pattern between expenditures and performance, there is an expenditure threshold from which education performance can be affected (Ferrer et al, 2011). Of course, once again, research is ignored to make political use of PISA, even making data speak for what is not said.

## **Conclusion**

To conclude, we would like to highlight the active role of national actors in mediating the external influences on national education policies (Takayama, 2008). Against some views of globalisation that tend to omit the role of national agencies, we argue that it is crucial to consider their role in order to understand why the same mechanism (in this case, standardisation through PISA) could have, and does have, such different impacts according to the context. In the Spanish case, the socioeconomic position of the country within the EU and the high level of politicisation of PISA results are two critical variables that are necessary to understand both its direct and its indirect effects.

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