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Toward a Critical Grammar of Education Policy Movements

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Introduction

Over the past two decades there has been an exponential growth in research papers on theorising the movement of policy ideas and practices, including those concerned with education, across national territorial boundaries, and the implications this has for the contexts into which it enters. A series of different terms are used to describe this phenomenon, ranging from policy transfer to policy borrowing, policy learning, policy mobility and policy travel (see Steiner-Khamsi, 2004). All have as a common concern an attempt to understand the mobilisation, movement and spread of education policy and practice across global space. And whilst the movement of policy, largely from central governments into specific localities, is not a new concern in policy studies, particularly those concerned with implementation, it would seem that the dynamics broadly associated with globalisation (cross border flows of ideas, people, technology, ideas, finance) have stimulated a fresh wave of interrogations, reflections and outputs on this topic. In other words, the globalisation of education policy and practice, as transfer, borrowing, learning, and so on, creates explanatory and normative burdens that differ from, and go beyond, those generated by analyses of the movement of policy in a national context.

This insight clearly raises the important issue of what we might learn about processes of globalisation and education that are stimulated by debates over the transfer of policy and practice across national borders. Our aim in this chapter is to elaborate some of the analytic consequences of the changing topology, geography and geology, of those debates. We see these changes as, themselves, consequences of the changes brought about to the world and the study of education policy, and its transfer, by the forces of globalisation. Like others, these changes have transformed the worlds we inhabit and experience, and consequently the ways we might understand those worlds.

Our strategy for opening up a debate about policy transfer is to place centre stage the globalisation of the Bologna Process; a political project aimed at transforming the form, scope and nature of higher education architectures across more than 46 European countries and beyond. We chose to focus on Bologna on the basis that it is possibly the most extensive and successful example of 'policy transfer' in education ever, to think about the globalisation of the education policy and practice more generally. Our strategy will be to consider the picture of Bologna that emerges from the kinds of account of it provided that draw broadly on the policy transfer/borrowing literature and the frameworks it is based on, and to compare that with an alternative, critical political economy approach to understanding globalisation and education. Our position is broadly that Bologna could not have happened without the changes brought about by globalisation, that it can be seen fundamentally as a response to globalisation in higher education as well as constituting globalisation,, and that understanding it entails revising the assumptions on which studies of policy transfer draw. Those assumptions were developed in a context dominated by conceptions of international transfer, and we will suggest that a different approach to the understanding of Bologna, drawing on conceptions of the transnational framing of policy, on the one hand, and on critical policy studies, on the other, can provide a different picture and account of the Process. In essence this involves us in 'problematising the problematic' of policy transfer in the fullest of senses of what this implies; as an approach to framing, naming and explaining the duality of motion and fixity of education policy in a globalising world.

Very briefly, the Bologna Declaration, setting up what became known as the Bologna Process and the European Higher Education Area, was signed in 1999 by the Ministers of Education of 29 European countries, including not only all member states of the European Union but other European countries as well. It is a non-binding intergovernmental agreement whose aims were to enhance the employability and mobility of citizens and to increase the international attractiveness and competitiveness of European higher education. As we will see in our analysis of Bologna, the stated aims/outputs are not necessarily the same as the implicit outcomes (quite apart from the related discussion to be had about the actual aims/outputs?). Its basis was a common degree architecture based on two main cycles, a three year undergraduate degree and a two year Masters degree. Following that beginning, it has continued to grow; in scope—it now has ten 'action

lines', all accepted by all members; in membership --it now has 47 members; in 'density'—the Bologna Follow Up Group, composing representatives of all member countries, was set up advance the process and organise the bi-annual Ministers meetings, while the European Commission plays a major role in funding and enabling the Process; and in scale—versions of Bologna have been adopted across the world. The Bologna process aims at creating convergence around its various action lines and is not intended to standardise European higher education, while emphasizing the importance of diversity.

Our basic procedure will be to articulate different accounts and pictures of Bologna generated by are provided by contrasting two possible explanations. One approach we call an 'orthodox policy transfer' approach', the second a 'critical policy movements approach'. We will then develop our analysis through deploying a complex, 'doubly articulated', argument. And whilst we will represent this as a series of moves, in reality these are mutually constitutive moments.

Our first move is to bring into view the changing place of education in a globalising world, and the implications of these changes for how we look at, and theorise, these relations. These changes include the role of the state, the rescaling of education governance, the changing role of the national, and transformations in wider agendas shaping the role, scope and place of education in a globally competitive world. In a second move, we specify in more detail the key features of each of the two contrasting approaches - 'orthodox policy transfer' approach' as opposed to a 'critical policy movements approach' - and the explanations each offer of the globalisation of Bologna Process as a concrete case of the globalisation of education. Specifically we take the two different literatures as the basis for developing a series of contrasting elements of the two distinct explanatory frameworks, or conceptual grammars, whose individual components have at least elective meta-theoretical affinities with each other. In a third, and final move, we reiterate the key elements of a conceptual grammar for the critical analysis of education policy movements across territorial boundaries.

Move 1:   Locating Education, and Policy Movements, in a Globalising World

In our first move, we bring into view the changing place and forms of education in a globalising world, and the implications of these changes for how we look at, and theorise these relations. We note that though there is considerable debate over precisely how best to define globalisation (Scholte, 2005), there is broad agreement that it is an historical process involving the uneven development and partial and contingent transformation of political, economic and cultural structures, practices and social relations (Hobsbawm, 1999; Jessop, 1999 Mittelman, 2004; Scholte, 2005). Crucial in these unfolding processes is the rise of powerful globalising actors; the intensification of capital accumulation; new political, social and class struggles (Harvey, 2006); and the denationalisation and transformation of policies, capital, political subjectivities, urban spaces, temporal frameworks (Sassen, 2006: 1). Having said this, it is also important to note that globalisation is also taking place within as well as beyond national boundaries.

One of the key effects of globalisation on education is an evident shift away from a predominantly national education system to a more fragmented, multi-scalar and multi-sectoral distribution of activity that now involves new players, new ways of thinking about knowledge production and distribution, and new challenges in terms of ensuring the distribution of opportunities for access and social mobility (Dale and Robertson, 2007). One way of conceptualising the changing nature, scope and sites involved in the work of education is to see a new 'functional and scalar division of the labour of education' emerging (see Dale, 2003).

More broadly, these emerging social structures of the world demand new knowledges so that we might understand better a new ontology of world order (Cox, 2002: 76). Ulrich Beck (2002), for instance, has argued that the global transformation of modernity calls for rethinking the

humanities and social sciences. He argues that the study of globality and globalisation has revolutionised the social sciences as these processes call into question the deeply held national assumptions that have historically shaped the development of modern social sciences. Like Cox (op. cit), what is at issue for Beck (2002: 29) is that it is not possible to understand changes in the nature of the relationship between social structures and our knowledge of the world with tools that are no longer fit for purpose. We require a new lexicon, Beck argues, to describe social phenomena that is not dependent upon what he colourfully refers to as 'zombie' categories—such as 'national states', 'identities', 'classes' and so on.

The globalisation of policy and policy transfer as explanation

There has been a lively and continuing debate about the nature, purposes and outcomes of policy borrowing more generally (see Dolowitz and Marsh 2000; James and Lodge 2003; Rose, 1993) which enables us to consider the phenomenon and its conceptualisation across wider canvases. Two reasons underlie the basis of the distinction between the policy transfer literature and the approach we will try to advance, and in particular, the way they represent and account for phenomena, such as the Bologna Process. The first is that the possibility of other outcomes than those related to the purpose and outcomes of what is seen as 'transfer' becomes very limited, especially since the dominant theme in the transfer literature seems to be how 'successful' the transfer is, and frequently how effective it is. This is linked to the second reason, which concerns what it is to be explained and how. When the issue of the 'success' of the transplant, and of the reasons for that are so prominent, this inevitably –and rightly in their own terms—frames both the conceptualisation of the problem and the theoretical and methodological tools to be deployed, in order to account for the relative 'success' of the transfer.

A very useful summary of 'conventional political science understanding of policy transfer' has recently been provided by Jamie Peck and Nik Theodore (2010). They suggest that these accounts:

> …typically posit the existence of a relatively unstructured policy market within which producer-innovators and consumer-emulators engage in freely chosen transactions, adopting policy products that maximize reform goals. In this rational-actor environment, policy transfers are stylized as a distinctively conspicuous category of boundary-crossing practice, the occurrence of which is (implicitly or explicitly) traced to superior performance in exporting jurisdictions….(becoming)' in effect, success stories, and as such…objects of emulation and learning. (They are)… predominantly concerned with ex post facto evaluations of "successful" transfers, often in situations of observed or alleged convergence, which are typically judged according to surface similarities in policy designs, scripts, and rationales. (Peck and Theodore, 2010, 169)

One basic difference between the two sets of problematisations, then, is that the 'orthodox' literature attempts to address the questions 'How does Bologna work?' and 'What are its domestic effects?', while what we see as the most important questions generated by the Bologna phenomenon are 'What work does it do, and for whom?', and 'what is the framework through which it realises this'? There are both 'internal' and 'external' differences between the 'orthodox' approaches and those we are seeking to advance. On the one hand, seeing Bologna as a form of policy transfer is made very difficult in so far as the 'transferers' and the 'recipients' are essentially the same people—national Ministers and Ministries responsible for higher education. On the other hand, while, of course, both foci are necessary, rather than focusing on the *context of Bologna* (where did it come from and what makes it like it is?'), the orthodox emphasis is very much on *'Bologna as context'* (how does it affect national higher education?').

Bologna may be seen as possibly the most extensive and effective means of bringing about levels of convergence of education policy so far witnessed, yet it shares few of the elements and mechanisms that are associated with existing studies of policy transfer. This difference is due largely to the changing circumstances—especially those we short-handedly refer to as globalisation—in which Bologna emerged and developed. Bologna has spawned a very large literature, much of which adopts similar assumptions to, or is more or less explicitly based on, the mainstream policy transfer literature. We learn a lot from that work about the nature of national higher education systems, and their responses to attempts to 'modernise' them on a common basis, and about how conceptions of 'the University' are also undergoing sometimes radical changes. However, such approaches do not enable us to capture as effectively as they might what is distinctive about the relationships between globalisation and higher education. They represent in essence a 'stretching' of previous conceptual frameworks that is ultimately limiting of the possibilities of analysis. Many of these studies resemble what we have referred to elsewhere as a set of methodological 'isms', in their adherence to a particular set of assumptions whose validity and relevance are taken for granted, even when the political, economic, social and educational conditions that they were developed to analyse have altered in highly significant and relevant ways.

The basis of our problematisation of the problematic encapsulated in the concept 'policy transfer' is that it assumes and is based on conceptions of the world that are losing their validity as globalisation advances. Our argument will be that for all its sophistication and relevance, this body of work does illustrate clearly what we take to be the under-recognition of the nature and importance of the changes in both the 'real' world and in our tools for analysing it consequent on the changes that are referred to as globalisation.

Move Two: Two Contrasting Perspectives on the Globalisation of the Bologna Process as Policy Movement

As signaled above, we intend to contrast two different approaches to the understanding of the Bologna Process as policy transfer/policy circulation and the kind of explanation they produce. Table 1 provides an overview of their differences – around the purpose of theory in explanation, the key meta-assumptions made in the globalization of education, the level of analysis, criteria for determining effect, process through which movement is explained, and methodology. We do not view these categories as exhaustive, but rather starting points for a discussion and further elaboration. For instance, there are important differences around space and scale that we do not address here but which feature very differently in these two contrasting explanations of Bologna as policy transfer.

The purpose of theory- problem solving or critical

We begin the process of contrasting explanations of the globalization of education policy/policy transfer by pointing to different conceptions of the *purpose* of theory in the two perspectives. The importance of this is announced in Robert Cox's famous declaration that 'all theory is for someone and for some purpose' (1996: 87). We use Cox's distinction between what he refers to as broadly critical theory and a problem solving approach to problematise the key categories that we use to approach the analysis of education in a globalizing world.

	'ORTHODOX POLICY TRANSFER'	'CRITICAL POLICY MOVEMENTS'
PURPOSE	Problem Solving	Critical
META-ASSUMPTIONS	'Isms'	Beyond 'Isms'
SCALE OF ANALYSIS	Middle range (Empirical and Abstraction)	Multi-level (Empirical and Abstraction)
CRITERIA FOR IDENTIFYING THE GLOBALISATION OF EDUCATION	Convergence	Change
PROCESS	Diffusion, Transmission	Logic of Intervention Programme Ontology
METHODOLOGY	Comparison-lite	Incorporated Comparison

Table 1: 'Orthodox' and 'Critical' Explanations of Globalisation and Education

Using Cox's work on problem solving and critical theory we argue education policy transfer theories, if and when applied in fundamentally unchanged form to provide accounts of 'post-globalisation' phenomena, such as Bologna, can be seen as essentially 'problem solving' and as offering accounts that: limit the range of analytical focus; view the object of inquiry as discrete and disconnected from wider processes; view the movement of policy travel as unidirectional, horizontal, relatively unhindered by topographies, and converging; and whose methodologies reinforce singularity rather than multiplicity and plurality. We argue that policy transfer accounts of the Bologna Process reveal only partial accounts of the complexity and dynamism of Bologna as policy. A more critical political economy account of the globalisation of Bologna as education policy would bring into view the significance of wider contexts and social relations in framing, constructing, circulating, receiving, contextualising, materialising and institutionalising Bologna, as education policy. For instance, the movement of key elements of the Bologna Process, such as Tuning, into the USA and Latin America, the intense debate in the USA about Bologna as a possible threat to US hegemony in higher education (see Adelman 2009), the reaction in Australia to the Bologna Process because of what it might mean to its share of the international student market, all have been key dynamics in shaping the forms, directions and consequences of Bologna, well beyond the European higher education area (Robertson and Keeling, 2008; Jayasuriya, 2010; Robertson, 2010). Nor should we see the Bologna Process as being simply about higher education. Rather, it has emerged as an instrument of foreign policy, of trade, labour mobility, as a mechanism of state-building, and as a means for Europe to build itself as a region. These developments, in turn transform our understandings of higher education, of knowledge, citizenship, rule and sovereignty (Dale, 2008). The contours of these changes would also all demand rigorous interrogation. Given this, explanations that tend to depend on perspectives that view the world and its social categories if they were static and universal, as in problem solving, limit our understanding of these processes. And as Gavin Smith points out, "…a whole series of key concepts for the understanding of society derive their power from appearing to be just what they always were, and derive their instrumentality from taking on quite

different forms" (Smith, 2006: 628).   This leads us to the second category for comparison – what we call '-isms'.

Meta-Assumptions: - Isms or Beyond –Isms?

Elsewhere we have argued that problem-solving as a set of meta-assumptions, leads to a set of tendencies or 'isms' in the study of education policy (see Dale and Robertson, 2008; Robertson and Dale, 2009). Our intention in pointing to these 'isms' in the study of globalisation and education is to suggest they limit our ability to *see* the full extent of changes taking place. By 'ism' we mean the 'tendency to see categories, such a 'education', 'private' or 'knowledge' as "…natural, fixed, and unchanging – or in other words, as ontologically and epistemologically ossified" (Robertson and Dale, 2008: 20). We (ibid: 21-29) identified four isms at work in analyses of globalisation and education; 'methodological nationalism', 'methodological statism', 'methodological educationism' and 'spatial fetishism' (see also Table 1). By 'methodological nationalism' we mean the assumption that the nation state is viewed as the container of society, and that education in this equation is contained solely within this container. By 'methodological statism', we mean the tendency to see that there is a universal form of the state - the Westaphalian state – with a common configuration of institutions, and mechanisms of governance. By 'methodological educationism', we refer to the tendency to see it as describing a system that is made up of a universally true configuration of actors and activities. And, by 'spatial fetishism', we mean the tendency to reify and naturalise processes, like globalisation, as in 'globalisation does' or 'the local is', locking us into atemporal and ahistorical analyses (Robertson and Dale, 2009: 28).

A fundamental assumption underlying much analysis of the relationship between education and globalisation concerns how far globalisation represents 'something new, distinct and different'; a break or rupture with what has gone before, and how far it represents continuity, albeit with quite harsh differences appearing, with what we have known before. It is notable that in the orthodox approach, globalisation is seen as 'exterior', as part of 'the context' shaping national education systems. Education may be shaped by, directed by, influenced by, dominated by, its contexts but there is rarely the implication that it is, for instance, either on the one hand constituted by its contexts or, on the other, continuous with them, or indeed that education and globalization are co-constitutive.

Yet even when globalization is taken as exterior, it is rarely analysed in the sense of a key *context of context*. Here, on the one hand, in the orthodox approach, globalisation is seen as 'exterior'; as too 'big', and complex, and concerned with economic and social issues, to be easily taken into account when looking at the details of education policy and provision. Yet on the other hand, education itself is at least implicitly seen to be too complex, too nationally-culturally informed, too path dependent, too 'nationally controlled' for it to be vulnerable to globalisation, except through the idea of convergence. That is, its sectoral, cultural, institutional etc integrity at a national level, and its ties to national purposes, make it a difficult proposition for globalisation. It might be expected to be among the last institutions to be significantly changed by globalisation.

Such assumptions form much of the interpretive frameworks and filters through which, at its broadest, the study of 'the globalisation of education' is approached. For instance, they tend to produce studies and theories of the middle range (in both the senses of that term—empirical and abstraction). In essence, they represent the collective wisdom/assumptions of the isms, what makes the isms so powerful in education. The dominant kind of analysis that this produces is comparison, of national case studies, with 'convergence' the key axis of comparison/measurement. Our argument is not that any of these elements are 'wrong', individually or collectively, but rather that they generate two theoretical/methodological ensembles which are likely to provide very different kinds of questions and answers about the relationships between globalisation and education.

If we turn to the expansion of the Bologna Process beyond its initial launch, an orthodox account might view its extension into the wider European space and beyond as being advanced by the European Universities Association; a European level association made up of rectors/administrators or their delegates from member states. Whilst it most certainly is the case that the EUA have played a critical role in the development and expansion of Bologna since 1999, to leave our analysis there would be to take at face value a common explanation for the presence, and purpose, of Bologna. It would also mean accepting the view that any changes in the architecture of higher education for signatory countries were largely technical matters. However, these architectures are, in themselves, forms of selectivity for what knowledges are possible, and what are not; why these particular kinds of packaging were central to the development of a competitive Europe, and so on. In essence, the Bologna Process needs to be viewed, not just as a higher education reform, but a reform that has altered what it means to talk about knowledge, the university, student mobility, a national higher education system, higher education as a public good, and so on.

Scale of Analysis: Middle Range or Multi-Level?

Our argument here is that the 'orthodox' analysis is largely pitched at what is known as a 'middle range'. There are two main axes across which the concept of middle range theory is elaborated, those of abstraction and level of focus[1]. The first runs from the abstract to the concrete, and the second from what is generally referred to as the micro to the macro. Our argument is that studies of the relationships between globalization and education typically tend to fall around and focus upon the 'middle' of both axes. On the one hand, the size and complexity and inaccessibility typically attributed to 'globalisation' tend to deter or discourage direct analysis of it, both empirically and conceptually. The perceived empirical and theoretical complexity both lead towards the development of middle range approaches. Empirically, coming to terms with globalisation as a complex whole appears as a daunting task. The response to this is often to seek to reduce both its size and complexity. Rather than looking at 'the global' as a whole, there is a tendency to try to reduce it to a more manageable scale, for instance through the use of proxies, such as quantitative scales; or 'intermediate' scales, such as regional rather than global; or taking particular institutions taken as representative or typical of globalisation, such as McDonaldisation, or international organisations; or focusing on 'a limited range of cases that are unified in space and/or time, (Thelen, 1999); or identifying a concept that enables several different cases to be discussed on a similar footing, of which policy transfer could be seen to be an excellent example. So, more generally, we may see that the concept of 'policy transfer, or borrowing, falls clearly into the middle range category.

Theoretically, the focus tends to be on discerning and describing the 'effects of' globalisation, and in particular using such criteria as 'convergence' as automatic proxies for the 'degree of 'globalisation' (see below). This eschewing of the search for more complex explanations is reinforced by the tendency to 'work our way up inductively from a 'messy' empirical reality and building our explanations from such patterns as we can uncover descriptively…(However) without a general theory of some kind to orient this procedure, analysis will generate only localised, 'middle range' hypotheses, which lack the capacity to penetrate aspects of causality or agency which extend more deeply into social space or historical time' (Rosenberg, 2007 467-8)

The problem with such strategies is, of course, that they tend to become fixed, and to move the analytical gaze away from the substantive targets themselves. They may become perceived not

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[1] It should be noted that there is considerable debate about the concept 'middle range'. There have been multiple different versions of the idea (e g), and it is not wholly clear how its originator, Robert Merton, intended it to be used (see Pawson), though the desire to avoid the twin dangers of American post war sociology, 'Grand Theory' and 'Abstracted Empiricism' was clearly influential, and has continued to inform subsequent discussion. Nevertheless, the continuing popularity of the concept suggests that it does resonate with some of the most basic and challenging problems of social theory and social research, and does fulfil a need in articulating those problems.

only as sufficient in themselves, but as constituting the theoretical and empirical problematic tout court. It is important to emphasize that there is nothing inherently 'wrong' with middle range theories and approaches; the problems emerge only when they become taken as sufficient rather than as necessary.

One very useful way of illustrating the consequence of the middle range focus is to consider the priority it gives to the concept of 'context'. This is especially noticeable and important in cases where, following the methodological nationalist assumptions of most comparative education, in studies concerned with the relationship between globalization and education, it is 'the national' comes to occupy the middle ground, empirically and analytically. This has a number of consequences, in both areas. In particular, the national becomes seen and represented as the key *context* in the mediation between global structures local detail. This is perhaps especially the case in comparative studies of education, where the concept of context has been signaled as especially important (see, e.g. Crossley 2000). Here, it is context that mediates and modifies the forces of globalization, and that gives them local meaning. However, here again, we encounter the problem of the exteriority assumption, that globalization , national states and education systems are involved in a fundamentally hierarchical, even nested, relationship; this becomes clearer when we see how little 'traffic' there is in these assumptions from local to global. The other element of the problem, which is possibly more important here, is that it means that the 'national' 'context' is by no means still (if it ever was) independent of the forces it is seen to mediate and localize, but to a degree constituted by them . In short, we need to problematise and frame the national rather than to take it as an independent modifying context. In other words (those of Brenner et al (2009) we need to identify the context of the (national) context. As they put it, there is a danger that when we are focusing closely on local contingencies and variations, "…(w)hat tends to fade into the background… is the *context of context* – specifically, the evolving macro-spatial frameworks and interspatial circulatory systems [i e, 'globalisation' RD/SLR] in which local regulatory projects unfold" (203).

Criteria: Convergence, or Wider Change?

One of the main, almost taken for granted, characteristics of work on the Bologna Process is its national basis; the great majority of studies appear to focus on Bologna's 'effects on' national HE systems and institutions . This in turn influences the research problematic in the direction of the idea of 'convergence'. If so many countries are apparently doing the same things, is one result that they converge over time? As Christoph Knill points out,

> …(while) transfer studies investigate the content and process of policy transfer as the dependent variable, (and) while the focus of diffusion research is on the explanation of adoption patterns over time…..convergence studies place particular emphasis on effects. Transfer and diffusion thus reflect processes which under certain circumstances might result in policy convergence…. Policy convergence thus describes the end result of a process of policy change over time towards some common point, regardless of the causal processes (2005: 4-5).

However, even though, as we have seen, 'convergence' is an officially sanctioned outcome of the Bologna process, it turns out to be a rather more complex and less helpful concept than appears at first sight. For instance, we need first to ask what is converging (input, output, policy, practice, how far, over what period, and with what consequences (Hay 2000). In addition, it is not clear what knowledge of inter-national convergence (of policies, practices, or whatever) tells us on its own. It seems likely to produce an interesting picture rather than one that is useful in policy or analytic terms. And finally, as in the case of making context a key variable, a concentration on the extent of convergence means that other possible forms and outcomes of the relationship between globalization and education are neglected.

The alternative approaches are based on many of the points we have been making so far about the changing nature and bases of education policy in an era of globalization. The idea of

convergence does reflect the recognition of the extra-national dimension of what is occurring via processes like Bologna, but very much from a perspective that places the national still in the centre, to all intents and purposes unchanged in its scope and authority. The interest is still in whether national systems are changing, rather than in whether what we are witnessing might represent something quite distinct, that does not replace the national, or result in an ultimate merger of all with all where all are alike, or in some kind of lowest common denominator (or more optimistically, highest common factor) solution, but in a novel and distinct entity. And the perspective that arises from a combination of the pictures created by studies of policy transfer, diffusion and convergence is one that makes it difficult to recognize the possibility of Bologna as a form of transnational cooperation, based on common problem perceptions and framings. Such a conception itself rests on a 'context of context' analysis of Bologna. What were the circumstances under which it was possible for what became Bologna to emerge? The more 'immediate' story of the beginnings of Bologna has now been clearly narrated (see Corbett, 2005; Croche, 2009; Ravinet, 2008) and we are well informed about it, and how its history shaped the context that Bologna now is. However, a wider account, of how global changes created opportunity structures for intervention in national education policy making, and especially in national HE policies in Europe, has not been nearly so fully articulated (Dale 2007), nor its consequences fully taken into account in the understanding of Bologna.

Process: Diffusion or Logics of Intervention?

The very term 'diffusion' is suggestive of the theoretical assumptions on which it is based. The essence of this is in the use of an intransitive verb—that is, a verb without a subject-- to account for the process being described, which then becomes a process without an agent, a considerable hindrance to effective analysis of the process. This point can be made most clearly though an outstanding and widely quoted theoretical study of diffusion (Strang and Meyer 1993). The essence of the argument is that diffusion occurs through a process of *theorization*, which 'facilitates communication between strangers by providing a language that does not presume directly shared experience. It provides rationales for adoption that run counter to simple interaction-based processes like direct mimicry and superstitious learning (where adopted practices are temporally rather than causally linked to desired outcomes' (496). However, the problem with agency does not disappear in this argument. There is a strong tendency to make 'theories' the subjects of sentences, with a basic attachment to abstract rationality—the terms in which theorization is typically couched, and which might be seen to make rational choice on the part of the adopter the key mechanism of diffusion. Thus:

> Theorization specifies why the potential adopter should attend to the behavior of one population and not some other, what effects the practice will have, and why the practice is particularly applicable or needed given the adopter. All this permits the actor to see through the confusing evidence of others' mixed successes and detect the "true" factors at work. *In short, theorization may be regarded as turning diffusion into rational choice.'* (500).

Here again, the nature and sources of the theorization, and the agenc(ies) propelling it, are not alluded to; it is the logic of the theorization that is the dominant factor, with the authors 'emphasiz(ing) the continuing role of a compelling logic in permitting such movements to gain support, and in defusing self-interested opposition' (495).

Marsh and Sharman (2006) also make the point about diffusion studies typically being based on processes without agents, but they also point out that, by contrast, 'transfer' studies tend to privilege agency, with 'a focus upon who was involved in transfer, how and why' (274). However, there are two other features of policy diffusion and transfer studies that are worth commenting on in this context. One is that, according to Mesaguer and Gilardi (2009), most analyses of policy transfer "…make strong *homogenizing assumptions* (such as that) any given mechanism is equally relevant or irrelevant across all cases; it is assumed that all governments are equally keen to engage in learning, are equally reactive to competitive pressures, or equally sensitive to emulative

pressures" (531). They go on to argue that there is an implicit model (of diffusion), where each mechanism is sufficient condition for increasing the probability of policy adoption, and in which each mechanism adds to that of the others' (ibid).

Globalisation's relationship with national education systems do not just 'happen' (as often appears to be the case in studies that use verbs like 'diffusion' intransitively to convey precisely such a sense of freedom from agency, if not spontaneity). It has to be actively brought about, and the 'practical' and theoretical means for doing that always and necessarily rest on what we will refer to as 'logics of intervention'. The question then becomes 'through what 'logics of intervention' does 'globalisation of education' work; *how* does it contribute to forms of educational provision that are always justified in terms of the *improvements* they will bring about. However, the link between 'educational improvements', and progress and societal improvement, is not automatic and straightforward. Rather, it is mediated and shaped through particular 'logics of intervention', which frame and specify in what ways and through what mechanisms education may be delivered to bring about the desired improvements. The simplest example of *a logic of educational intervention* is the use of curriculum change to bring about educational and wider social change—change what you teach and you will change the learner--a tendency so deep rooted as to seem in no need of explanation.

The logics of Bologna as an intervention are to some extent spelled out in its founding aims—increasing competitiveness, increasing the mobility of labour, increasing the attractiveness of European education, all with a view to improving Europe economically, augmented perhaps by a trickle-down logic. The point here is that understanding Bologna more broadly involves matching the *logic* of intervention to the *means* of intervention—policy transfer—with which in this case its relationship becomes rather complex, given differences of governance and jurisdiction between Europe and member states.

The two approaches differ in the ways that they conceive of the 'how' of the transfer programme, what makes it likely to succeed. In seeking for a way of attempting to find a basis for generalization of successful (or rejection of unsuccessful) social interventions and innovations, the English sociologist, Ray Pawson (2002), argued that the crucial point is to distinguish between what he calls the 'Programme' and the 'Programme Ontology'. Basically, the Programme is the intervention, or policy, or innovation that is being introduced or implemented with the intention of bringing about beneficial changes in some social phenomenon. The 'Programme Ontology', by contrast, accounts for *how* programmes, policies, etc, actually work. It is essentially the 'theory' of the programme, what makes it work, as opposed to its content alone (and 'the theory' is typically quite likely to be implicit). The clearest example of programme ontology is perhaps that of smoking cures. Pawson argues that it is necessary to compare their ontologies, the ways they are intended to bring about a cessation of smoking; these can vary between hypnotism, nicotine patches, financial rewards, showing lurid videos of poisoned lungs, etc. These all work in different ways, and it is the ways as much as the contents of the programmes that make them effective. According to this perspective 'it is not 'programmes' that work: rather it is the underlying reasons or resources that they offer subjects that generate change. Causation is also reckoned to be contingent. Whether the choices or capacities on offer in an initiative are acted upon depends on the nature of their subjects and the circumstances of the initiative. The vital ingredients of programme *ontology* are thus its 'generative mechanisms' and its 'contiguous context" (Pawson 2002 342). The relevance to the Bologna seems clear. Rather than offering a particular foolproof, or indispensable body of content, that was to be taken up as faithfully as possible (in the normal implementation mode), the Bologna Process may, for instance, be more usefully seen as operating as/through a form of 'soft law', offering (its members) reasons and resources that will enable them to generate change in individually distinct but collectively mutually attuned ways.

Methodology: Comparison 'Lite' or Incorporated Comparison

Forms of comparison are central to most studies of the Bologna Process, especially inter-national comparison. However, the forms of comparison practised are not on the whole such as to meet with the approval of the comparative education community, and hence we refer to them as 'comparison-lite'. They are comparison-lite', because when we move 'beyond' the national level, it is necessary to have some way of constructing a basis for comparability. This necessity inheres in the need to have a basis for assuming that transfers take place both between countries/legislations that can be shown to be sufficiently similar to each other for comparison to be meaningful, and because comparability is essential if we are to be able to judge the value of different polices. Thus, researchers are called on to provide data that allow comparison of policies across nations and that bolster beliefs that policy makers in one country can learn from the success or failure of policy making in another. The 'lite-ness' that this involves is evident from Gail Wilson's account of uses of comparison in the context of Europe. She comments on the statement that 'Within a more integrated European environment, it is becoming increasingly important to allow access across national and linguistic boundaries so that decision-makers can be provided with a broader, comparative picture of society across the continent' (Matthews and Wilson 2000), '*Such statements imply an approach to the translation of information that will eliminate as much cultural variation as possible in order to produce standardized and comparable data. It is also an approach that obscures the power relations inherent in the production, translation and use of information*', (2004, 4, emphasis added). The highlighted sentences capture neatly both the essential 'lite-ness' and competitivity of the comparisons made.

The comparisons can be referred to as competitive, because their purpose is not just to compare, in an analytic sense, but to contrast, in a competitive sense. Such comparison operates as a technology of transnational power—and to provide the basis of reputational competition, between countries and instituions. This has very clear overlaps with what Antonio Novoa and Tali Yariv-Mashal (2003) refer to as comparative education as a form of governance, where they "insist on the importance of comparative approaches as a way to legitimate national policies on the basis of 'international measures'…which result in the creation and re-creation of 'global signifiers' based on international competition and assessment".

In essence, this means the purposive elision or standardisation of national differences in pursuit of comparability for the purpose of more efficient and effective government, effectively both making national institutional boundaries more porous and laying the basis for the construction of both reconstructed and reshaped national education sectors and a transnational education sector. In so far as comparative education is complicit in this, it is ironic that that involvement definitively undermines the national basis on which it has rested and taken for granted.

Very briefly, the alternative to this, which is intended to come closer to realising the enormous analytic potential of comparative studies (not confined to the inter-national) within the Bologna Process, is what we call 'theoretically articulated comparison'. The effective use of the comparative method is far from straightforward in studies of globalisation (or Bologna) and education. Within this group we can distinguish explanations that see globalisation as a process, a product, a discourse, a project, and so on. However, in the majority of cases, globalisation is seen as a force external to and affecting, individual nation-states and their education systems, and the role of the comparativist is to distinguish between these impacts, and to speculate on their causes. We are thus confronted with a range of studies that are effectively not comparable, because we cannot be sure that they conceive of globalisation—and consequently its relationship with nation states and their education systems--in the same way, irrespective of, and prior to, the nature and effectiveness of the comparisons they make. So, in effect, one of the first moves we should make is to carry out a comparison of the theories that underpin comparative studies and inform the methods they use. This can be the first stage of what we refer to as a process of 'theoretically articulated comparison'.

Cases do not pre-exist theories, nor are they external to them, or independent of them; their 'casing' is always theoretical, even though the theories framing them may be taken for granted, implicit, unarticulated or unrecognised. This is a key element of the difference between articulated and unarticulated (methodological) comparison. Perhaps the commonest form this framing takes in comparative education is its 'methodological nationalism'; the unproblematised assumption that cases are 'naturally' nation-state based.

It is then necessary to interrogate the theoretical construction of the cases on two bases. First, we need to ask, what they are cases *of*. For instance, if we think of the different understandings of globalisation that we mentioned above, we see that each of them sees/constructs globalisation as a case of something different from all the others. Those who see globalisation fundamentally as a discourse will be less interested in the actual practices that might be associated with it than those who see it as a process, for example. Second, we need to consider what we might call their 'explanatory theorem'. What is the logic through which they see to analyse and elucidate the case that they have constructed? What are the key variables and mechanisms involved, how are they related to each other, in what explanatory sequences/relationships? Having completed these preliminaries, we could then begin to consider how a comparative methodology can be marshalled to both test and maximise the explanatory capacity of the theories.

Move Three: By Way of Conclusion - Toward a Critical Grammar of Education Policy Movement

We are now in a position to draw on the comparisons we have advanced between orthodox 'policy transfer' explanations of Bologna versus a critical account of policy movement in order to lay out the basis for what we think might be some of the elements of a critical grammar of policy moment.

In our discussion of problem-solving versus a critical theory approach to the movement of education policy across borders we argued that a critical theory approach would emphasise their *relational, dialectical* and *co-constitutive* nature. This means placing education policies into a series of contexts—from the production of the policy to its movement and new point of fixity --and that these contexts are themselves understood, not as neutral backdrops or convenient launch and landing places, but as co-constitutive. Here we would be alert to the power of particular ideas to mobilise, materialise and institutionalise political projects in education and other sectors and in constructing pedagogical subjects. And whilst recognising the tendential nature of powerful policies, we also would want to be mindful of the dialectical nature of social events and social outcomes, and that societies themselves are open systems. A critical theory approach also reminds us of the importance of problematising and reflecting upon the tools, or theories, we use to see with – or as we argued, 'problematising the problematic'. This includes locating our theories of the world in those worlds – whose wider 'rules of the game' make possible, visible and commonsensical particular ways of seeing over others. The question that needs posing here is: what kind of work does 'policy transfer' do in constituting social relations and in realising powerful political projects?

This leads to our second point; the need to beware of 'Isms' in order to go beyond them. A critical grammar of policy movement would be attentive to the ways in which *categories* are constructed, contain, and order, particular social groups and problems (and not others) making them the object (or not) of education policy interventions and solutions. Naturalising categories enables governing to also take place through the mundane, routine and commonsensical. The purpose of a critical approach is to reveal the constructed nature of categories. In doing so, it brings into view the *power* of some categories to more easily move over topographies, avoiding the frictions of uneven development and difference. The Bologna Process is a good example here; of a project able to move across diverse cultural, political and economic topographies and be inserted – its speed of movement and apparent ease of institutionalisation in a new space the

result of its multiple faces and the politics of its *contexts of reception*. We also pointed to the need to see key actors and scales of action, such as the state, and the national as a nodal platform for advancing education, as themselves undergoing major changes in geometry, form, and reach, with major implications for the sites, structures and subjects of education policy. In other words, we also need to take account of the *context of contexts* which makes some policy problems and their solutions visible and viable, and others not. Jessop (2005) calls this 'structural selectivity'. If policy is moving (as it has), but this time frequently over a more extended (global) space involving national territorial borders, who, how, and with what outcomes, are education policy problems and their solutions being constructed, projected, contested and materialised. At the current conjuncture, the movement of education policies across national borders, particularly by international agencies, or private actors, reveals a complex set of issues – particular when these national borders encompass particular ways of understanding sovereignty and rule, particularly around the education-state-society contract?

The third element of a critical grammar emerged from our discussion on middle range theory. We argued middle range theory is premised on a particular conception of the hierarchical nature of the world, and of explanatory frameworks, expressed through the two pairs, simple-complex and abstract-concrete; it 'fixes' theorising at imaginary intermediate points along those two scales, at a point where it is not too simple or too abstract to prevent the emergence of valuable insights and analyses. However, such conceptions assume the relative independence of levels of simplicity or abstraction, rather than the continuity of the two scales. Or, to put it another way, 'simple' depends on a particular conception of 'complex', 'concrete' on a particular conception of 'abstract'. We only know that a theory is a middle range theory if we know what a more complex and a more abstract theory might look like. In our view this begins to matter when we encounter phenomena that exist at *different levels of complexity* and can be can/need to be *analysed at different levels of abstraction*. Our contention is that the Bologna Process is an excellent example of just such an issue, but more than this, the levels at which it exists themselves interact. One example of this is the existence of 'the global' *in* the local, as well as *exterior* to it, or produced by it—as in the case of Santos's (1995) 'globalised localisms' and localised globalisms'.

Fourthly, a critical grammar would focus attention on the *logic of intervention* entailed in any policy problem definition and its solution. We mentioned briefly some concrete examples of what we understand by the logic of intervention above, but here we will attempt to elaborate a little further on the assumptions the idea rests on. At their heart is the distinction between *processes*, *outputs* and *outcomes*, which frequently appear as if they are identical. Very simply, processes are means through which intended or unintended outputs may or may not be effectively produced, and outcomes are the intended or unintended achievements of outputs, that may or may not be effectively. It is the distinction between outputs and outcomes that is crucial here. We could take an output as a specific intended goal of a policy—to improve school performance in Mathematics, for instance, or to increase the number of foreign students recruited to local Universities. Outcomes, by contrast, are the wider goals of the policy—the ultimate purpose of the outputs produced. By focusing on the logic of intervention regarding the Bologna Process, we can see that it is about outcomes rather than outputs. It specifies outputs—the action lines, etc—but they are seen as means towards a set of outcomes—a stronger Europe, a bigger share of the international market for students, a global presence for Europe, etc. And the logic of intervention applies essentially to outcomes rather than outputs. So, we may see convergent outputs in Bologna, but they should be seen as not only important in themselves, but much more so as a means towards a common outcome.

A fifth element in a critical grammar would problematise claims to convergence, precisely because the specificities of historical institutional structures places limits on replication. Convergence is also a trickier concept than is often recognised. Where it becomes the sole or dominant measure of the success of a policy like Bologna, it tends to crowd out other possible outputs. This isolation of convergence as an output is a logical consequence of the linear, means-end logic that is assumed and followed by many studies of policy transfer; it can be seen to be relevant and measurable. Against this, we favour a more tendential approach, where goals are

tendentially generated rather than pre-specified, as in the case of convergence in the linear model. Jessop offers as an illustration of spatial-scalar divisions of labour (which we may see in the Bologna Process) 'the tendential dissolution of the distinction between foreign and domestic relations' (336). This may clearly be linked to Bologna, as the Process's transnational basis can be substantiated in many more ways than through convergence. For instance, it may lead to increasing differences between conceptions of domestic and external within nation states, as well as changing the nature of external-become-internal relations that is implied by Bologna. As well as crowding out other possible outputs at a national level, a focus on convergence also distracts us from the recognition that 'convergence' can occur at input, output, policy and process levels, as noted above, but needs also to similarly multiplied when we consider the possible geographical scales of convergence, such as sub-national, national, regional and global.

Finally, a critical grammar would problematise *comparison* as a methodology in the analysis education policy movements. It engage in what we have called *theoretically articulated comparison* (see Dale, 2010). In other words, as a conceptual priority, it would spell out the theoretical bases on which the comparison of the cases rests. From there it might ask questions around what is to be learned both substantively and theoretically, but this ought to follow, and not be in place of, theoretically articulated comparison.

Comparative Education, as an area of study, has enjoyed a new lease of life under globalisation, and has made a number of moves to respond to the differences that accompany it. However, some of its basic assumptions and propositions have remained in place. In particular, 'lesson-learning', a deeply modernist value, seems to retain a strong position among the rationales for comparative education. Here again, the Bologna Process raises a number of issues that would not have been present in comparative education a quarter of a century ago. It would, for instance, be interesting to harvest responses to the question 'who learns what lessons from Bologna?' Which practices, at which levels, might others want to emulate? Interestingly, it is clear from the success of the Bologna global forum, where many countries from outside Europe came to find out more about Bologna, and especially to find out if they might be allowed to join, or be associated with it, that Bologna itself is a process deemed worthy of emulation. However, emulation may not be a wholly correct interpretation of their motivation here; they may not be looking to learn lessons at al, except the lesson that membership of Bologna is likely to be useful in itself, especially given the number of countries already involved—that is, policies may be adopted solely or mainly because they have been adopted by other countries, whether to gain mutual benefits or avoid loss from not being involved (Mesagur and Gilardi, 2009). But in the end, our view is that by far the greatest benefit to be gained from comparative studies is the generation of new hypotheses. Properly conduced, comparison is the method that takes us closest to explanation. Lots of red meat here right at the end!

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