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## Re-conceptualising education policy trajectories in a globalised world: lessons from a multi-level comparison of accountability in France and Quebec

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### ABSTRACT

This article aims to show the value of the concept of policy trajectory to compare, from a long-term perspective, the transformations of education policies in the context of globalisation. After discussing the scope and limitations of the analyses of the concept in the literature – descriptive, sequential, metaphorical and building on the works of Stephen Ball –, we propose, our own conceptualisation. This regards policy trajectory as a double shift in time and space and understood as the result of different processes of path dependency, translation and bricolage. The forms of this trajectory depend on the educational orders at work at different levels of school systems, and not only at the global level. To illustrate this approach, we draw on a study which compared performance-based accountability policies in France and Quebec. Despite some challenges, this approach has the merit of proposing a fruitful theoretical framework for studying and comparing policy implementation.

### KEYWORDS

Policy; trajectory; accountability; globalisation; institutional change

In accordance with the overall theme of this issue, which emphasises the historicity of institutions and seeks to introduce the ‘arrow of time’ into comparative analyses, the aim of this article is to show the value of using the notion of policy trajectory to think about the political changes that contemporary education systems are undergoing in the context of globalisation. Taking up Stephen Ball’s invitation to think of education policies not only as texts and discourses but also as trajectories of public action (Ball 1993, 1994, 1997), we regard policy trajectory as the shift in time and space of different elements (policy programmes, tools, devices, discourses and so on) which are perpetually recontextualised at different institutional levels. For this purpose, we propose a theoretical framework that combines a North American neo-institutionalist approach with the perspective of the French sociology of public action. The trajectory of an education policy is therefore understood as the result of different processes of path dependency, translation and bricolage. The forms of this trajectory also depends on the educational orders<sup>1</sup> at work at different levels of school systems, not only at the global level.

The article is based on research results presented in detail in a previous book (Maroy and Pons 2019). This four-year collective, qualitative study, whose methodology is

presented in note 2 below, compared the accountability policies implemented in two contrasting school systems – France and Quebec – that are exposed with unequal intensity to international imperatives.<sup>2</sup> Such policies are particularly instructive for comparative analysis, as they imply – by all assumptions – a high degree of alignment of a domestic policy with global culture (such as the ‘global testing culture’). The refutation of these assumptions allows us to reasonably consider that our theoretical framework is relevant to analyse many other less similar cases of educational policy transfer and implementation.

The article is structured in five sections. We first situate our theoretical approach in the existing international literature on the notion of policy trajectory. Next, we summarise the main historical steps of the accountability policies implemented in the two systems studied. This second section offers an opportunity to present several empirical characteristics of our object of research, but also to illustrate a first vision of the trajectory as a shift in time. We thirdly highlight the multiple mediations of these policies at work at the intermediate and local levels of the systems studied, in other words, the trajectory as shift in space. In the following section, we concretely implement our theoretical framework by re-reading these policy trajectories as combinations of institutional changes (path dependence and incremental changes), translation of international or supranational imperatives and policy bricolage, which is an opportunity to truly consider the trajectory of an education policy as a movement in time and space. In the last section, we discuss the lessons that can be learned from this approach.

## Four main conceptions of policy trajectories

Up until now, the notion of policy trajectory, which is sometimes described as reform trajectory, has been considered in different ways in the international literature, each with its advantages and limitations.

A first group of works use it in a rather descriptive way. The notion of trajectory then refers to a succession of political episodes or reform situations that the authors present in detail, such as the successive redefinitions of the civic education curriculum in Singapore and the Philippines (Baildon, Sim, and Paculdar 2016), the transfer to Brazil of the ‘global best practice’ Escuela Nueva programme initially developed in Colombia (Tarlau 2017) or reforms of initial teacher education in Australia (Rowe and Skourdoumbis 2019). While this work generally allows us to go into the details of historical contexts and empirically document the theses put forward, it provides very little theorisation of the very notion of policy trajectory.

Other works adopt an approach that we describe as sequential. For example, this is the approach proposed by Sally Power, Geoff Whitty, Sharon Gewirtz, David Halpin and Marny Dickson, on the basis of several previous works on ‘policy trajectory analysis’, when they emphasise different ‘key episodes’ in English education action zone policy: the launching of the policy, the first bidding round, the second one, the pressure from the Ministry of Education to demonstrate success and the transformation of the policy (Power et al. 2004). Work that borrows from Christopher Pollitt and Geert Bouckaert’s notion of ‘reform trajectory’ can also be included in this category (Pollitt and Bouckaert 2004). Reform trajectories, such as those of school inspectorates in Norway and Sweden for instance (Hall and Sivesind 2015), are then conceived as a succession of sequences

(with a starting point and a target future) embedded in overall reform scenarios and guided by projects led by reform entrepreneurs. This type of sequential approach has the major methodological advantage of serialising many questions, favouring policy tracing analyses in contrasting education systems and thus enabling their comparison. Here again, however, the theorisation of the notion of policy trajectory seems less important than the methodological interest of the tool. Moreover, like any sequential approach to public policy (Jones 1984; Lasswell 1956), the succession of sequences is not always highly relevant empirically and tends to convey a ballistic vision of policy processes.

A third – more comparative-historical – perspective considers the policy trajectories of developing countries through the categories used by David Johnson to analyse the processes of policy borrowing and policy lending in four Indian Ocean school systems: ‘telling’, ‘rebelling’, ‘compelling’, ‘selling’ and ‘gelling’ (Johnson 2006). This approach also has a strong sequential dimension since each of these categories is associated with a historically situated politics. The telling phase corresponds more to the episode of colonisation and the forced transfer of policy from a metropolis to its colonies; the rebelling phase to decolonisation, which sees the emergence of alternative policy programmes; the compelling and selling phases to the country’s entry into contemporary globalisation; and the gelling phase corresponds to the gradual consolidation of a hybrid knowledge economy borrowing from both indigenous and external political models. Nevertheless, the approach is not limited to this, since what the author presents as ‘metaphors’ are used in the analysis as components of an overall theoretical model, as types, or even ideal types, which then enable the cases studied to be positioned. Charlene Tan thus shows that, while Cambodia’s policy trajectory is still strongly characterised by the ‘compelling’ model characteristic of highly indebted countries that struggle to implement education policies independent of a neo-colonial system, that of Singapore is closer to the ‘selling’ model according to which an education system succeeds in penetrating the world market and selling an education model of its own (Tan 2010). Interesting as this approach is, for example, when it comes to showing historical trajectories in very clear graphical forms, it raises several problems. It tends to set a normative horizon common to the trajectories of all the countries studied and can thus convey a deterministic vision of policy trajectories: why should they necessarily move towards a politics of gelling? Or more precisely why should comparative analysis be designed in these terms? Moreover, this approach provides little information that would make it possible to circumscribe the analysis of the policy forces in question: what policy processes should we be looking at? Finally, it tends to consider the trajectory only in a temporal sense, and less as a process of multiple recontextualisations of the political imperatives by the actors according to their position and interests in the policy process.

This is precisely what Stephen Ball proposes to do in several of his writings (Ball 1993, 1994, 1997). This approach to policy trajectories is currently the most widely discussed in the international literature, and it is the one we adopt. Nevertheless, the uses of Ball’s work are also varied. Several authors cite his research, notably to underline neoliberal governmentality, but without delving further into the very notion of trajectories (Liasidou 2009; Serpieri, Grimaldi, and Vatrella 2015). Others, on the contrary, faithfully reproduce it and attempt to deepen and systematise the analytical inputs proposed by the author, such as the analysis of ‘policy influences’, the production of texts, practices and their effects, the results they produce and the strategies implemented by actors

(Griffiths, Vidovich, and Chapman 2009; Ledger, Vidovich, and O'Donoghue 2015; Ledger and Vidovich 2018; Mifsud 2016; Nagahara 2011; Paveling, Vidovich, and Oakley 2019). Still others mention Ball's approach, retain its orientation or general philosophy, but propose theoretical frameworks other than Foucault's analysis of discourses for thinking about shifts in time and space. These frameworks, such as Michel Callon's sociology of translation (Barzanò and Grimaldi 2013) or works on New Public Management which propose an *ad hoc* theoretical model (Hall et al. 2015), sometimes replace, but more often complete, this form of discourse analysis.

This article is situated in the last perspective. It proposes a theoretical framework that combines a North American neo-institutionalist approach, either organisational or socio-historical, with the perspective of the French sociology of public action (Maroy and Pons 2019). The former stresses that institutions – understood broadly as rules, norms and cognitive frames (Scott 1995) – matter, due to the obstacles or barriers that they can represent for certain policy solutions or political games while at the same time supplying resources for action. Institutional arrangements are constraints, resources and objects of public action. The latter on the contrary tends to emphasise actors' games at various levels and in various scenes that matter for the development and implementation of a policy, underlining that the actors involved have various interests, sources of power and identities, that they could interpret and make sense of the policy in various ways, and that in the policy implementation process, political manoeuvres – impositions, compromises, struggles, etc. – are very important. This sociology of public action, which is sometimes regarded as the French version of policy analysis in political science (Halpern, Hassenteufel, and Zittoun 2018) – even if it is developing in several European countries – integrates different theoretical approaches to the policy process, which all have in common an extension of policy analysis from the action of governments to the numerous policy actors contributing to producing public action.

The tension between these two analytical traditions led us to understand the trajectory of an education policy as the combination of three processes or mechanisms, often entangled empirically but distinguishable from an analytical standpoint.

The first refers to mechanisms of path dependence on earlier choices, due not only to the viscosity of institutions but also to actor mobilisations (Mahoney and Thelen 2010). The conception of education policies, and also their implementation and their evolution in time and space, are shaped by existing institutions – formal rules and shared norms and also ideas and cognitive categories (Scott 1995). As Paul Pierson (1994) showed, the initial choices made when a policy is introduced restrict the breadth of choices available later, making marginal or incremental changes more likely than radical ones.

The second process is bricolage, whereby education action is developed in the context of negotiations and struggles among actors (Campbell 2004). For Claude Lévi-Strauss, bricolage is the work of a handyman whose

universe of instruments is closed ... the rules of his game are always to make do with "whatever is at hand", that is to say with a set of tools and materials which is always finite and is also heterogeneous because what it contains bears no relation to the current project, or indeed to any particular project, but is the contingent result of all the occasions there have been to renew or enrich the stock or to maintain it with the remains of previous constructions or destructions. (Lévi-Strauss 1962, 27)

In policy analysis, bricolage means that public action is a dynamic assembly of heterogeneous elements in their natural or evolving state; such elements are not necessarily designed to be tied together. Bricolage may be cognitive, institutional or political, depending on the elements it incorporates and assembles, and it may involve a kind of innovation whereby existing elements are combined in an inventive way.

The third process is translation, as defined by Michel Callon (1986), by certain national actors of policy ideas and instruments circulating on a transnational level (Maroy and Pons 2019; Maroy, Pons, and Dupuy 2017). This means that policy implementation in a globalising world implies various forms of problematisation and recontextualising of policy imperatives at various levels, and that this implementation is not reduced to a one-way translation of global imperatives at the domestic level.

### **Trajectories as (only) shifts in time: the illusions of continuity**

When addressing the genesis of performance-based accountability policies in France and Quebec, it is possible to identify three main historical stages that appear to be relatively similar in those systems. This might suggest that we are dealing with closely related trajectories that are subject to similar historical sequences.

In both cases their accountability policies, whose policy design looks very similar, are based on new regulatory tools that were developed in response to key challenges identified in the 1960s. Without necessarily constituting their actual historical origin, the social events of this decade may prove a relevant starting point. In Quebec, the Quiet Revolution and the Parent Commission (1963) led to a definitive transfer of education to the state in a system in which schooling was historically in the hands of faith-based organisations. This paved the way for deep structural changes (creation of an education ministry, development of public primary and secondary schools with relatively unified curricula and pedagogical systems) and for new societal conventions such as modernising Quebec society thanks to a new 'national' policy and promoting education accessible to all. All these elements created new structural needs in terms of knowledge and control of this newly emerging system. In France, the massive 'May 68' social movement which contested the foundations of French society had, of course, various impacts on education, and even on the administration of education. For instance, several 'critical reflection groups on administration' were created in May and June 1968. They provided reports in which their rapporteurs pointed out, among many other topics, the lack of tools that would allow the Ministry to improve its knowledge of the school system and the need to depoliticise school administrations and make them more accountable to their constituents.

The following period, from the 1970s to the end of the 1990s, led in both countries to a stronger instrumentation of accountability, although this did not yet constitute a policy in itself at that time. This instrumentation took different forms from one country to the other, notably because it attempted to respond also to additional issues that were merged with the previous ones and which manifested themselves differently in each country. In Quebec, the reinforcement of schools' autonomy was simultaneously a response to criticisms of the excessive centralisation of education, a way to promote school access, and a consequence of the penetration of the international 'school-based management' model. While the School Boards (SBs) were up-sizing progressively,

increased school autonomy, at the same time, led to a growing local accountability of schools to local communities based on various policy tools, such as school projects or innovative programmes implemented in disadvantaged schools with a view to improving their success in line with statistical targets identified in the Ministry's action plans. In France, the 1970s–1990s period led to the accumulation of numerous new policy tools whose aim, according to their advocates, was to move the governance of the French education system from a uniform, bureaucratic, top-down and, moreover, corporatist control of the schools to a more flexible, managerial and post-bureaucratic style of governance. Thus, systemic analyses, score boards and new managerial methods within school administrations were introduced from 1969 onwards, and, starting in the mid-1970s, school projects, national tests of pupils and performance indicators. Likewise, the introduction of evaluation tools at different institutional levels took place from the 1980s on, while the conclusion of contracts between schools and administrations, or within the latter, became an official practice after 1998.

In both countries the 2000s seem to have been an important turning point giving birth to more codified accountability policies. This is particularly the case in Quebec, where a succession of laws clearly laid the foundations for results-based management (RBM). Bill 82 (2000) developed New Public Management within the whole administration, including the Ministry of Education, in the form of strategic plans, 'annual steering indicators', and performance rates, and led to the schools being expected to implement 'success plans'. Bill 124 (2002) made strategic planning processes within SBs and schools mandatory. Bill 88 (2008) introduced contractualisation – in the form of 'partnership agreements' between the Ministry and the SBs as well as 'management and educational success agreements' between the latter and individual schools –, while ministerial targets were imposed on SBs. Lastly, Bill 105 (2016) reinforced vertical coordination through increased monitoring capacity and provided an opportunity to better integrate policy tools and merge them in a steering process in which performance-based accountability – towards parents and superordinate authorities – exceeds local democratic accountability. In France, a 'steering by results' policy was more explicitly formalised from 2003 onwards and materialised in the preparation of two main Acts. The first was a law – called *Loi organique relative aux lois de finances* (LOLF) – which reorganised both the vote and the structure of the French state budget. Adopted in 2001, this law was implemented only from 2006 because of the major structural changes it brought about, such as the subdivision of the budget into specific missions, the definition of priority actions, and the specification of targets and performance indicators in all areas of action of the government, which is now accountable to Parliament for the efficiency of its action. The second law is the Act of 2005 which confirmed the importance of evaluation, but which also created objective contracts that each school is required to sign with the regional administrative authority. These laws were later supplemented by waves of audits within the central administration during the years from 2003 to 2012, by several ministerial initiatives which aimed to strengthen the role of this or that tool (e.g. of contracts or school evaluations), depending on the period, as well as by a progressive rationalisation of the testing policy.

Nevertheless, this apparent continuity is misleading for at least two reasons (Maroy and Pons 2019). First, it conveys a linear conception of these policy trajectories which is empirically questionable. The history of the Results-Based Management bills in Quebec



and that of the successive instrumental initiatives in France may give the impression of a somewhat linear construction of the policy tools. This impression could be all the stronger as the policy designs are relatively similar in the two countries and as official discourses intend to give the policy and policy tools more coherence than they actually had. Yet detailed empirical and historical investigation clearly shows that (a) certain tools took longer to develop than others; (b) some tools may even have a particular history of their own (for instance in France, contracts had not always been developed to be inevitably linked with projects, evaluation processes and performance indicators); (c) several tools may have been associated with clearly different policy preoccupations during the period of introduction; and (d) most of these tools are more or less linked to each other, depending on the policy contexts. The second reason for a misleading understanding of the implementation process is that the apparent continuity could lead the researcher to conclude that strong institutional isomorphisms are at work, whereas, in fact, a closer examination shows that different modes of implementation did co-exist within each context and at different policy levels because of mediation and instrumentation processes that we shall now address.

### **Trajectories as shifts of spaces: the logics of policy mediations**

The aims, instruments and tangible effects of accountability policies are subject to mediation at the intermediate and local levels as soon as the legal texts and policy instruments are adopted. The trajectory of a policy is thus shaped in its effectiveness, meaning and effects by the spatial variations of its implementation, according to the scales on which it is situated, but also according to the positions and socio-spatial contexts of the actors who enact it. In this respect, we have studied the different logics of mediation at work in intermediate governance bodies and schools, using Malen's (2006) typology. This author distinguishes different logics of mediation according to the process and the degree of effectiveness characterising the implementation, namely the logics of nullification, dilution, appropriation and amplification. We complement this typology by adding that these logics proceed in an interrelated way from four main factors and conditions that are specific to each space under study. These are (i) the professional ethos and the conception of accountability shared by the leading actors; (ii) the history of the institution concerned and the types of reciprocal relationships between the actors (e.g. between principals and teachers or between schools and intermediate authorities); (iii) the pressures of institutional contexts and the competition among schools; finally (iv) the way in which school issues are being discussed within the local institution.

These logics can be illustrated both in the practices of French academies and Quebec School Boards and in those of the schools under their supervision. For example, the Eastern Academy – with a territory where many social and educational difficulties are concentrated together with a high staff turnover – is developing a logic of dilution of the accountability policy. For various reasons, such as recurrent low performance scores, regular increases in the number of pupils, the proliferation of acts of violence, and strong trade-union and political opposition, it is particularly difficult for the authorities to stabilise steering by results. The regulation of the academy thus is committed to focus on issues like the management of staff resources or the repeated occurrence of incidents and protests of all kinds. The question of results and their management becomes



secondary, and pedagogical management is delegated to the schools. The major challenge is, first of all, to 'normalise' the academy.

By contrast, in the Southern French academy and in two SBs in Quebec, a logic of appropriation prevails. All of these three intermediate entities clearly implement at their level the national policy of governance by results and the instruments of public action that underpin it. This implementation strategy thus gives rise to a strengthening of the vertical control of the SBs over the schools, but also to the introduction of other tools for regulating schools on the basis of a better knowledge of their strengths and weaknesses and to the regular and incentive-based monitoring of their improvements in terms of educational effectiveness. Similarly, in the Southern Academy, the administrative authority is placed at the service of the teaching profession so that both parties together tend to give concrete expression to and prescribe the 'concern for performance' to schools. The resulting logic of appropriation is progressive and at the same time selective, as it gives way to arrangements that seek to bring together the interests of the intermediate administration officials and those of the local contexts with which they have to contend on the occasion of, among others, trade-union opposition, competition from private education, diverging parental expectations or budget cuts.

The third dominant logic is that of amplification, according to which intermediate authorities are not simply content to implement the reform, but strive to create the conditions for a lasting commitment of the local actors, particularly the schools, even if this means sometimes going further than what is planned at the national level. This can be seen in the French Western Academy and in the Eastern and Northern SBs of Quebec. In the latter, the amplification logic is visible in the pronounced degree of RBM instrumentation and a strengthening of the control of the SBs over schools in terms of monitoring results and giving pedagogical support. In addition, the requirement becomes apparent to create and maintain a culture of pupil success and performance through different types of organisational rituals and mechanisms for the training/socialisation of principals and teachers. In the Western Academy alike, we have come to identify an essentially normative amplification of the principles of governance by results – well beyond a mere dutiful adherence of the administrative teams to those principles and corresponding schemes for mobilising and training headteachers for their new roles. This is a form of amplification, moreover, that is supported by an amplification of its instrumentation via emphasis on data, the production of original indicators, the development of procedures for the systematisation and harmonisation of practices and other means.

The different logics outlined so far can also be found at the level of secondary schools, however with more pronounced contrasts between the situation in France and in Quebec. In the high schools examined in France, two types of logic become manifest. These are either a logic of dilution – reflected by out-dated school projects, non-existent contracts, evaluations of the *lycées* with no regulating effect or ineffective internal consultations on results – or a logic oscillating between appropriation and gentle dilution. The latter form of mediation results in a clear decoupling characterised by, on one hand, the formal conformity with the application of RBM tools as demonstrated by school headmasters towards their supervisory authority, whereas, in contrast, at the school level, such management does not really affect the teaching staff. The instruments are therefore introduced by the headmasters with wide variations according to local contexts and with very little coordination between the different tools. They are more frequently used

because of the intention to improve their knowledge of the social and organisational context, and much less frequently because of the wish to mobilise and lead educational teams in terms of teaching. Ultimately, despite a certain managerial rationality shared by the principals, the diversity of collective working relationships in French schools leads to a broad variety of forms of managing the ongoing teaching activities.

In Quebec schools, by contrast, it is a logic of appropriation or amplification which can be observed. First of all, the major tools are effectively implemented by the school management, even if this implementation is carried out according to various modalities (more or less participatory), ambitions (more or less strongly depending on teacher's resistance), and with variable effects. Moreover, this implementation, and the use of the tools by the principals, show a real articulation between the different facets involved in the RBM policy. The success plans and contracts are built on the basis of statistical tools and are coupled with tools for pedagogical monitoring and consultation as well as for the professional development of teachers. The principals mobilise the latter as part of a pedagogical management approach, and strengthen – to varying degrees depending on individual schools – the control of managers over the work of teachers through the monitoring and coordination of their teaching activities. The Quebec schools therefore illustrate to a certain degree the reconciliation between the pedagogical work of teachers and the organisational logic of change.

In this paper, we cannot detail all the conditions and factors that specifically underlie the different mediation logics that are effective at the level of intermediate school governance or the school level (Maroy and Pons 2019). Suffice it to emphasise that these factors make up local educational and institutional orders in which they play a systemic and inter-related role in defining the ways in which school-related issues are problematised. Indeed, the educational authorities at each level define the main issues their respective entity has to face; and they make political decisions on guidance and regulations not only according to their convictions and professional ethos, but also according to the context (institutional or competitive) and the given configuration of actors as well as, finally, in response to the logic (of dilution, appropriation, or amplification etc.) which characterises their sphere of action.

Moreover, the mediation logics identified so far in turn affect the social experience and significance, the degree of effectiveness, and the organisational or institutional effects of the policies implemented at the local level. While it is not possible to develop this in greater detail here, different logics of mediation produce different forms of result-based governance. Mediation by dilution of the national policy is thus associated with bureaucratic governance, based on red tape regulation of schools, and combined with local management which ensures that the implementation of the policy does not fall within the area of autonomy of educational teams. The appropriation logic of this same policy takes the form of a reflexive results-based governance, which relies on incentives for improving practices on the basis of new knowledge, but the effects of which vary from one school to another. The result is incentive-based management of pedagogy and performance, which remains of low intensity. The logic of amplification, for its part, takes the form of regulatory governance by means of knowledge tools and supervision of local teaching practices which, in Quebec, encourage a management of pedagogy in which the managerial influence is of high intensity.

## Trajectories as double shifts: a three-dimensional approach

The structuring of the trajectory of accountability policies results from the interaction of several processes. The first process to consider is a kind of dialectic between the relative inertia of certain institutional arrangements (be these regulatory or normative) and the initiatives for change carried out by various entrepreneurs at different levels. These initiatives are more or less resolute attempts which strive to come up against *path dependencies* resulting from inherited social and institutional choices and constructs. Moreover, the entrepreneurs of change effect more or less radical *translations* of the models and tools of the accountability policies circulating in transnational organisations or implemented in neighbouring countries or in countries considered as significant. Finally, taking into account the contingency of local educational and institutional orders that have evolved at different levels and spaces of action, it is obvious that multiform *bricolages* of the meanings, the goals, the tools and the ambitions associated with accountability policy can be observed in both societal contexts and at different levels and moments of analysis.

### ***Dependence on existing institutions and entrepreneurs of change in school governance***

In both political systems, accountability policies did not emerge *ex nihilo*. On the one hand, they appeared in institutionalised systems of school structures – rather centralised in France and decentralised in Quebec – that were inherited from history and governed in different ways: in France, through a combination of bureaucratic, corporatist and charismatic regulation (van Zanten 2008), in Quebec through a conjunction of bureaucratic and more ‘horizontal’, ‘community-based’ modes of regulation (Lessard 2006). On the other hand, reflections on reforming the pattern of school governance had already a certain tradition. Thus, in school administration circles in France (Pons 2017), a debate on how to improve it began in the 1970s with a focus on projects, contracts and indicators. In Quebec, reflection on the place of SBs and the search for a balance between centralisation (by the Ministry) and decentralisation (towards schools) began in the 1970s (Brassard 2014). The first versions of school projects were born as early as the 1970s, soon followed by the specification of the first provincial outcome indicators in the 1990s.

Moreover, between 2002 and 2015, the RBM laws were developed in Quebec while maintaining a continuity of the existing institutional structures, and without calling into question the very existence of the SBs. Indeed, under Canada’s constitutional protection of linguistic minorities, SBs and their elected commissioners enjoy legal protection and have not been challenged in principle by the RBM policy, notwithstanding demands to this effect from an opposition party and from school principals’ associations. Despite criticisms levelled against SBs – questioning their democratic legitimacy and bureaucratic character – only a slow institutional conversion of their functions took place. They are becoming a relay for ministerial policy and are obliged by the RBM mechanism to demonstrate their effective management of local school service provision and to satisfy the needs of users/parents. This change of direction was brought about by successive governments of opposing political stripes, which passed Bills 124, 88 and 105 with the support of

several interest groups in the school sector, such as the associations of directors and boards of the SBs or of parents' representatives (Maroy and Pons 2019).<sup>3</sup>

At the same time, the promotion of accountability tools also stems from the action of the professional associations of SB directors and school principals who are in favour of the implementation of this policy. While RBM-related strategies are expected to increase their accountability towards higher hierarchical levels (as well as towards parents), accountability tools are also seen as favourable to changes in teachers' practices and, beyond that, to higher student success (Faye 2017; Maroy 2017). Unlike the teachers' unions, the representatives of those professional associations did not only support the reforms in the consultative commissions of the Quebec parliament; the SBs have also been careful to develop operational tools for the statistical and pedagogical monitoring related to RBM.

In France, the political initiative in favour of changing the modes of governance and promote steering by results seems, at first sight, to have been more erratic and subject to an alternation of advances and setbacks. The reasons for this have to do with the political dynamics of French politics, on the one hand, but also with the resistance from teachers' unions within the school system, on the other.

Thus, the alternation of the Presidents of the Republic and of major parties supporting them – from the left or the right – led to rather volatile political trends. As a consequence, 'steering by results' has not followed a linear development. Between 2004 and 2007, under the presidency of Jacques Chirac, several ministerial reports and various administrative, intellectual or think-tank pressure groups tended to promote it by articulating tools that successively appeared on the school scene, such as school projects, contracts, and the evaluation of results. By contrast, between 2007 and 2012, during the presidency of Nicolas Sarkozy, the political majority prioritised budget cuts without promoting steering by results other than rhetorically. Finally, between 2012 and 2017, the return to power of the left during the presidency of François Hollande allowed the reactivation of accountability policy, with a focus on contracts, but a (temporary) freeze of the development of results evaluation systems.

Moreover, the political entrepreneurs of change, even the most determined ones, have always taken into account the opposition to this policy from certain key players such as the teachers' unions. This is reflected in particular by the institutionalisation of 'vagueness' in the legal texts promoted, particularly with regard to the procedures and consequences of accountability. This strategy is indeed likely to reduce the opposition of teachers' unions and guarantee school principals room for manoeuvre or interpretation in a system where the institutional forms of regulation (i.e. corporatist, bureaucratic, and charismatic) which have long characterised it have been largely preserved.

Thus in France as in Quebec, the gestation of accountability policies results from long and complex processes of change in confrontation with institutional inertia. In other words from processes in which dependence on existing institutions and entrenched practices and the more or less determined action of entrepreneurs of change intersect with political and administrative struggles and those in the schools themselves.

### **Translation**

The domestic construction of the tools of accountability described so far was favoured by considerable external influences in the 1990s and 2000s and, in their wake, translations of

the discourses, models and tools imported from transnational organisations or neighbouring countries. In France, these influences were particularly evident through the European dynamics ahead of and subsequent to the Lisbon Strategy adopted in March 2000. In 2003, France was urged by the European Commission to take greater account in its policy of the benchmarks and indicators adopted at the European level. At the same time, on the occasion of the 2002 presidential election, right-wing parties, experts, and public planning and foresight bodies active at national level developed and supported a strategic programme of regulation by results that combined greater institutional autonomy with accountability on quantified objectives, a goal that was immediately opposed by left-wing parties and related researchers and experts. This programme found partial concretisation in a 2005 law – carried by a right-wing government – which introduced a ‘common base of knowledge and skills’, and in which European concerns, the recommendations of the PISA survey of 2000, and the electoral programme of the right converged. Thus, the translation of the transnational discourses in favour of the definition of ‘standards’ and the coupling of school autonomy and accountability for results took place not only in expert committees but also in the very process of intense political and media battles regarding French national politics more generally.

In Quebec, the influence of foreign or transnational discourses and models on the construction of provincial education policy was mediated by the senior Quebec civil service and pan-Canadian coordinating bodies. Thus, the principles of New Public Management as well as the experiences of administrative reforms in English-speaking countries or provinces were presented and highlighted in a report by the Secretariat of the Treasury Board, a report that was instrumental in preparing Bill 82, which initiated the reform of Quebec’s public administration in 2000. On the other hand, the international discourse on the necessary performance of education systems was conveyed and mediated by the Council of Ministers of Education of Canada, which produced several statements presenting the options shared by the Canadian ministers. In these statements, the issues of human capital and the performance of education systems in a globalised knowledge economy were strongly emphasised. The ministerial statements also reiterated the need to develop systems of common indicators, the exchange of good practice, and accountability for performance. But the translation of external models of accountability was also present at SB level. The experience and the accountability tools developed in the neighbouring province of Ontario were imported and adapted in three of the four Quebec SBs included in our research.

### ***Bricolage***

Finally, the trajectory of the policy is shaped by political or cognitive bricolages regarding both the aims and theory of action of the accountability policy and its more operational tools. The different forms of bricolage are carried out by political actors or other entrepreneurs of change in school governance who operate at different levels of school systems.

In Quebec, for example, bricolage occurs at all levels of action. In the development of successive laws on RBM, their promoters presented accountability as an expedient response to several of the key issues of the schools system: as a regulatory mechanism that would promote ‘success for all students’ through the efforts to improve school

teams it would generate as well as a policy that would improve the legitimacy and democratic transparency of the management of public schools compared to that of private schools. The bricolage may also concern the very tools of policies, which first underwent a tendency to pile up, owing to the successive laws adopted between 1995 and 2008, before they were simplified and semantically redefined in Bill 105 in 2016. This simplification had been prepared by bricolages of the tools within the remit of the SBs, which, well before the adoption of this law, had decided to merge the ‘success plans’ of the schools with their ‘management and success agreements’.

In France, as well, bricolage appears at several levels of action and in several facets of the accountability policy. In addition to the national political bricolages already mentioned, they can be seen in the implementation of the *Loi organique relative aux lois de finance* (LOLF), that is in a law which, in the spirit of NPM, aims to reform the structure of the state budget, by linking various funding objects to quantified targets and action plans. The so-called ‘management dialogues’ between the Ministry and the academies, which in principle should lead to a contract between both levels, suggest that budget allocations are essentially made in relation to objective needs (linked, in particular, to demographic parameters) and that there is no connection between the resources actually allocated and the performance objectives of the various action programmes of the academies. Similarly, at the school level, the use of the various accountability tools prescribed by the administration (such as contracts, projects, or indicators) is always a contingent and variable bricolage depending on the school management and the configuration of the actors.

## Theoretical discussion

We see at least two advantages to considering policy trajectories as a combination of institutional changes, translation processes and various forms of bricolage.

The first, which is directly related to the perspective of this issue, is to propose a way of changing the logic of comparative analysis by inviting the researcher to build new spaces of comparability that take more account of the historicity both of educational systems and of the policies supposed to reform them. Thinking in terms of policy trajectory when analysing education policies in a context of globalisation does indeed imply a shift in the way we look at it.

In the light of such an approach, the globalisation of education is no longer seen as merely a trans- or supranational normative process imposed – from above or from outside – on those who govern and act in education. Corresponding ideas about the process of globalisation are now well documented in the international literature. They essentially refer to either (a) the mechanisms of institutional isomorphism of a ‘world society’ (Ramirez 2012) and its avatars in the field of accountability in education such as the so-called new ‘global testing culture’ (Smith 2016; Zapp, Marques, and Powell 2021), or (b) to the imposition and dissemination of new models of governance, which different governments cannot avoid adopting, and which often appear in the literature in the form of ‘turning points’ (comparative, topological, quality, performance, etc.); finally, these are conceptions based on (c) the ever more rapid circulation of de-contextualised information and data, particularly those resulting from international surveys. The effect of these flows is, then, to make new spaces commensurable, such as a European

education policy space (Dale and Robertson 2009; Lawn and Grek 2012); to introduce new surveillance logics (Lingard, Martino, and Rezai-Rashti 2013), and to bring about the emergence of new educational models whose internal coherence is not always obvious and against which someone's own models are to be reassessed (Waldow, Takayama, and Sung 2014).

Once education policies have been re-embedded in their context-specific long-term temporality, this pattern of globalisation, more precisely: this process of normalisation on a global scale, appears, rather, as a source of alternation of educational reform trajectories that are caught up in long-term historical processes and framed by educational models and institutional orders whose highly diverse forms unfold a more or less pronounced structuring power. The challenge for researchers is therefore not so much to construct international comparisons that are balanced term by term in order to determine the degree of convergence of education systems towards one or more normative models. Nor does this challenge mean that they confine themselves to issues of the reception, borrowing or lending of foreign policies or models (whether inter-, supra- or trans-national), a perspective which is also widely documented in the international literature (Steiner-Khamsi and Waldow 2012). The true challenge is to work on the logics of indigenisation at work and to explore the factors that may explain why and through what mechanisms certain socio-political contexts generate more varieties of practices, representations, educational models or policy strategies than others. In our view, the advantage of such an approach is that it does not reduce the scope of a case-centred comparison to a simple relativisation or falsification of strong theoretical models; nor does it lose itself in a historicism that would become its own *raison d'être*. It rather constitutes a third and intriguing way of understanding and comparing the contrasting effects of the greater or lesser historicity of public action.

The second advantage of the approach that we have tried to make clear so far is that it provides a theoretical framework for thinking about the implementation of education policies that does not reduce this to a well-defined sequence in a linear public policy process (after design and before evaluation), nor to a pure cognitive activity of sensemaking or sensegiving (Spillane, Reiser, and Reimer 2002; Weick 2001). What we want to underline, is an approach, moreover, which does not reduce the implementation of certain policies to strategies of adoption of, resistance to or just apathy towards political pressures to change (Hirschman 1974), nor to the inevitable conformation to recomposing institutional roles. In a policy trajectories approach, rather, implementation appears to be a perpetual activity, going on at all levels, of (re)contextualising new political injunctions – through translation, bricolage, and the reinterpretation of constitutive rules – in specific institutional games or policy configurations (Pons 2020).

Such an approach is consistent with the overall theoretical project outlined by Stephen Ball. In a retrospective article dated 2015, he suggests – but does not strongly conclude in this sense – that the project, developed in his 1993 article under the title 'What is policy?', namely the idea of paying attention both to policies as texts and to policies as discourses has on the whole failed, judging by the large number of articles whose authors think that they are doing discourse analysis while they actually study only texts or political language (Ball 2015). In contrast, bringing the triptych of translation, bricolage and institutional change to full advantage makes it possible not to limit oneself to policies 'as texts' (i.e. to processes of mediation or contestation of the ideas carried by policies), but also to move on towards policies 'as discourses' (i.e. to the implicit and taken-for-granted



knowledge and assumptions that are constitutive of these policies and the views of the world and the institutional ourselves that they promote). Providing constantly a balanced analysis, such an approach can make it possible to study both how actors make policy and how policy makes them, to paraphrase Stephen Ball. It works on the evolution of the constitutive rules of school systems induced by new policy programmes without overestimating their power of transformation. It precisely analyses their historical genesis and their content without adhering immediately to the modernity they are supposed to embody for their promoters. Lastly, such an approach considers the games of actors who make policies at all levels. While policies and actors are certainly embedded in pre-existing institutional orders, actors – without overestimating their agency – have also room for manoeuvre when it comes to translating or assembling various political imperatives.

However, such a policy-trajectories approach implies several challenges for researchers which, if not addressed, may limit the scope of their analyses. First, it is methodologically very demanding and can hardly be developed by one researcher alone. The multiplicity of the levels of analysis to be taken into account; the insertion of the analysis in a long temporality which requires a fine historical knowledge; the diversity of the theoretical axes of investigation implied by the triptych translation/bricolage/institutional change; without forgetting many intermediate questions depending on the object of analysis chosen (for example here the instrumentation logics) or the coordination, necessary for the overall model, of theoretical positions not always combined together in the existing literature, all this taken together implies a fundamental task which can hardly be carried out by one person alone, even less so in a comparative perspective.

Another difficulty is that of delimiting the framework of the analysis: Where to stop the analysis of the logics of (re)contextualisation? How to delimit, or not, the consideration of this or that variable on a solid empirical basis? For example, in the case of our research, the question arose of the place to be given in the analysis to the professional identities of the actors and to certain works of the sociology of professional groups, insofar as these identities play an important role in the successive phases of the re-contextualisation of political imperatives.

Lastly, even if such an approach could lead to a precise identification of the factors explaining why some socio-political contexts are more likely to generate specific practices than others, it remains difficult to determine the reasons why some policy trajectories are more difficult to influence or reorient than others. This raises the thorny question of comparing the degree of firmness of institutional orders, a firmness often deduced *a posteriori* in the analysis.

## Notes

1. In this article, we refer to educational or institutional orders as more or less stable institutional balances in the social relations between educational actors. These orders are based on specific constitutive properties that determine the values, roles, practices and representations of the actors. They produce rules and they frame individuals' possibilities of action and negotiation. Such an approach does not mean that there is only one educational order in a social system, but that several are in tension.
2. The (New)AGE ('(New) Accountability and Governance in Education') project was supported by the French national research agency, ANR, and by the research institute for society and culture of Quebec, FQRSC, and it compared performance-based accountability policies in France and Quebec. These policies were regarded as most similar cases of education policy

globalisation whose possible disconfirmation may be instructive when studying least similar country-contexts. Our strategy consisted in choosing a policy – accountability policy – which can be seen as a typical example of an education policy promoted by transnational organisations and showing that, even in this obvious case, variations in its implementation are not unilateral but fundamentally multi-level and dependent on the policy trajectory of each system. If these aspects were empirically proven, then it could be argued that it was also true in least likely cases. Our strategy of comparison, oriented to cases rather than variables, in terms of Ragin’s well-known distinction (1987), consisted in analysing deeply and intensively two country-contexts through an inductive, qualitative, comprehensive and interpretative approach, to understand the complexity of each context and highlight the dynamic links within it. The contexts were chosen because they not only allowed the most different systems comparison, but also with a view to broadening the empirical coverage of the international literature on accountability in education. The French education system is characterised by a high degree of administrative centralisation, an emphasis and reliance on ministerial circulars as a mode of interdepartmental communication and regulation, and resistance to external influence, especially that of New Public Management (NPM). By contrast, in Quebec, while the main administrative, curricular, and published pedagogical guidelines were centralised at the state level from 1960, the school boards were present at the inception of the educational initiative and have always had room for manoeuvre. And there is no such thing as resistance to transnational ‘public management’ discourse within Quebec public administration. For both country studies, we used different qualitative methods to collect appropriate data: analyses of different types of documents (official texts, institutional documents, parliamentary debates, press releases and newspaper articles), observations in schools and school administrations (when they were possible) and numerous interviews with actors at different institutional positions within the educational system. The field study was conducted in four school boards (*Commissions scolaires*) and four secondary schools in Quebec and, in France, in nine high schools (*lycées*) – six public and three private – which were located in three very different education administration districts (*academies*, called ‘academies’ in this article; in the French education system, academies designate state-run education authorities in charge of primary and secondary education at the regional level). The research brought to light many results. For instance, it showed that while both education systems were exposed to the requirements of transnational ideologies such as NPM and, particularly, to accountability, these requirements were translated on the basis of the specific contexts and problematisations of domestic policies and that this led to highly diversified forms of globalisation in France and in Quebec. For more methodological details, see Maroy and Pons (2019, 95–113; <https://doi.org/10.1007/978-3-030-01285-4>).

3. After completing our fieldwork, the situation changed more radically in 2018 with the advent of a new government majority led by a party favourable to the disappearance of the SBs. While maintaining and simplifying RBM tools, Bill 40 from January 2019 abolished school elections and imposed a change of name for the SBs, which became ‘School Service Centres’. Also, a SB executive director is now to be appointed by the provincial government rather than by the college of elected commissioners. This law is, however, subject to judicial recourse at the Federal level, in the name of the Canadian Charter of Rights and Freedoms.

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