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John Benedicto Krejsler
Lejf Moos *Editors*

What Works in Nordic School Policies?

Mapping Approaches to Evidence, Social Technologies and Transnational Influences

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Foreword: Dare to Cross Boundaries to Gain New Knowledge

This book offers the reader a long, complicated and interesting journey. It presents the Nordic countries from the Middle Ages to today, the transnational influences on Nordic societies and policies together with the tension between Democratic Bildung and Learning Outcomes Discourses. These overviews are indeed necessary to be able to understand similarities and differences in and between the Nordic countries. Knowledge about the context is also important when analysing education and governance in different countries.

I should recommend the reader to start with a look at a map over the Nordic countries and reflect over their localisation and size. Search for the borders, out in the sea (maybe on a bridge), out in the forest or up in the mountains. Only Finland and Denmark share sizeable parts of their borders to another country than a Nordic. And last but not least, think of the number of inhabitants in the Nordic countries. Most people live today in the larger cities, urbanisation has taken place at different times in the Nordic countries throughout the history and is still ongoing. In some areas there is an opposite movement, moving out into the countryside. The Nordic countries are sparsely populated but still all countries work, in different ways, to provide education and social services throughout the country, to give all access to education. This emphasises the importance of the local context. The impact that the local community has on education and on, for example, how to balance or choose between Democratic Bildung and Learning Outcomes Discourses needs to be highlighted.

In this preface, I will use some of the statements in this book, elaborate them in my way, to contribute to the ongoing discussion of how education can be based on science and proven experience. The inspiration for my reflections leans on some distinctions made by Krejsler (see Chapter 1) and used in this book as a point of departure. I will not use his three distinctions properly just use them as an entrance to my reflections. The distinction Krejsler uses is between evidence-based vs evidence-informed knowledge, between global vs local forms of evidence and the between external vs internal evidence. My reflections use two questions which are embedded in the distinctions mentioned. I take them out of its context to give me the possibility to discuss the following: Who has relevant knowledge in a local community to make decisions for the local school education? And who has the right to

make decisions about which forms of evidence that count as knowledge for work in schools?

Who has relevant knowledge in a local community?

Like several country reports touch upon, there is a tension between central and local levels, between influence from politicians and from professionals in education, including agencies, at different levels. It is obvious that the size and localisation of a municipality affect the ability to have knowledgeable and competent people at all positions. To handle this, small municipalities can merge with others or just cooperate better to get a broader and economically stronger platform to be able to take responsibility for the education defined and regulated on a national level. There are big differences between municipalities within a country, and sometimes similarities between municipalities in different countries are more striking that similarities between those within a country.

One part of the so-called Nordic model is the way we view the democratic system. The general elections are the bases on which the society is built. The results of the elections determine which persons are appointed to various committees – national, regional and local – including who will be the members of the parliament or the government. Perhaps it is needless to point out, but there may be different results of the elections at different levels. Politicians are therefore regularly appointed to school boards to be responsible for and ensure that all children have equal opportunities and access to education from preschool to adult education. A board that can be politically in opposition to the government (Moos and Paulsen 2014).

To enhance the knowledge in a single municipality, all the Nordic countries have a range of different officials, and the head is often titled 'superintendent'. The superintendent has the power to suggest to the board on how to handle national regulations in the local situation. It is worth studying to what extent the superintendent suggests decisions based on evidence-based or evidence-informed knowledge. It is a long journey from transnational ideas via the national level to the local community with a school board and a superintendent. In one country this is made with confidence and trust between the national and local level, in another mistrust is high (Moos et al. 2016).

Back to one of the main reasons for education; the importance to give all children not only access to but also education that gives them knowledge and Bildung enough to survive in the world and at the same time knowledge to help the world to survive (Kemp 2005). To have that, several prerequisites are needed. Well-educated teachers are obvious, but also motivation, expectations, challenges, encouragement and support from the local community are needed. It takes a village to raise a child is true also outside Africa, where the saying comes from. A study conducted in Sweden shows that the culture in a local community, their view on education and Bildung effected the results in schools (Nihlfors and Johansson 2015). It was not the quality of education that mattered it was the common view on and expectations for future jobs that affected the pupils' interest and motivation for education. When responsible persons in the local community expressed that they were quite satisfied with the

results in school, even if these were lower than expected we called them 'good enough' (Nihlfors and Johansson 2015). This setting was more common in rural areas where pupils have to travel, if interested, for upper secondary education and higher education. It can be mentioned that young people leaving the municipalities seldom return after having completed their studies. 'Good enough' can also be a positive expression of being quite satisfied with life conditions. Some officials emphasised the importance of building a well-functioning society where people want to stay and move in – not move out. Bildung was in this context not on the agenda.

This brings the question of evidence and what works back to the transnational arena. Who knows how to develop equivalence in education in all schools, regardless of size and socio-economic situation? How often is the mission of education and Bildung overriding measurable results on that level? Will the Covid-19 pandemic change what we value? It is an empirical question – if someone puts it on the research agenda.

Who has the right to make decisions about which forms of evidence count as knowledge for work in schools?

Maybe there is an answer to this question – professional teachers. But this is not obvious in all Nordic countries. The difference in teacher education between the countries provides a clue. Finland and Norway require a master´s degree for several teachers. That means that teachers are more prepared to answer directly to the question what they need to be able to teach on scientific and proven experience.

The situation in Sweden is different. To supplement the periods used in this book I will give a mini picture of how the national level has, over time, looked upon teachers and research (build on Carlgren 2010). *Before 1950* in Sweden, teachers were looked upon as *subjects* in research and development work. There was not much money in research, but research-projects where teachers were co-researchers existed. Later on, the plan was to involve teachers to be part of research by generating hypotheses that would be systematically tested by researchers. This was not realised. The next period, *between 1950 and 1980* teachers became the *object* of research and development in schools. There was a normative approach even if the term evidence based wasn't used. *After 1980* the teachers are back as *subjects* but without possibilities to research. Now in 2020 experimental work is done, again to give teachers and the professions not only access to research but also to be the key persons to formulate what knowledge is requested (SOU 2018:19). This work is linked to the obligation to take responsibility for the scientific base of education. Similar developments are taking place in Norway.

This is not only about teachers' possibility to be part of research it is also a question of which questions and problems underlie the research aimed for developing teacher education and teaching? It is the classic questions of what works, the balance between developing schools through reforms (implementation) and giving the power to the teachers and the profession to identify issues and take ownership and responsibility for them (Stigler and Hiebert 1999). This may request scholars who

want to participate in another form of research to be able to produce knowledge about complex problems in different contexts:

> By exploiting differences in the kind of knowledge that scholars and other stakeholders from diverse backgrounds can bring forth on a problem. I argued that engaged scholarship can produce knowledge that is more penetrating and insightful than when scholars or practitioners work on the problems alone. (Van de Ven 2013 p. 265)

This present book about evidence and best practice offers descriptions and problematizations among other things of how ideas are transformed throughout the world, of how politicians and mediators have a strong influence on what has traditionally been perceived as the domains of professional teachers and school leaders. When teachers are well educated and have access to and can influence research, policymakers and decision-makers have to be prepared for factual counterarguments.

Are there enough Nordic voices among researchers and practitioners who dare to cross borders of different kinds to find answers to questions they didn´t know they had?

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Foreword: Useful Knowledge in the Twenty-First Century

As becomes evident in this volume, the Nordic countries share a long, not always harmonious history. From the mid-twentieth century, their respective education policies, however, displayed many common traits, with political visions and reforms stressing social justice, equality and social cohesion – sometimes called 'a Nordic model of education' (Blossing et al. 2014; Telhaug et al. 2004). This does not mean that the economic functions of education to promote the individuals' and the nation's prosperity and welfare were ignored; they were part and parcel of the education policies (Lundahl et al. 2010). The large education reforms were commonly prepared by public commissions engaging politicians and experts, and education research often played a prominent role in providing data and analyses for this work. In Sweden, for instance, the leading education researchers investigated the key question of the optimal time of differentiating pupils on different tracks for more than a decade preceding the 1962 decision of the 9-year compulsory education *grundskolan* (see, e.g. Paulston 1968). Hence, one could very well speak of evidence-based education politics and schooling during this period of time.

It is no exaggeration to say that education and politics have undergone dramatic changes in most countries during the last four decades. To a large extent these changes have to do with considerably tighter connections between the state, education and the economy. The accelerating globalization of economies and technological development, and the strengthening of supranational bodies such as the World Bank, the OECD and the European Union have not led to the sometimes expected retrenchment of the national states, but rather to their transformation into *competition states* (Ball 2009). Hence, the state has received a crucial role of optimizing the preconditions for economic growth and competitiveness of the nation and of business itself. In this context, education is regarded as a core provider of human capital, and increasingly also as an important market for a range of goods and services. Consequently, the former relative autonomy of basic education vis-à-vis the economy has more or less disappeared at a time of new managerialism, marketization and commercialization of education (Ball and Yodell 2008; Verger et al. 2017). Sweden is the Nordic country that has gone furthest in the direction of transforming education according to the demands of the economy (Lundahl 2016). Even Finland,

which has been far more restrictive in, for example, opening up for school choice and competition between schools, is quite active in promoting business interests in education.[1]

Looking at the relationship between education policy and research on education, I would firstly argue that *the very knowledge object* has altered radically (Lundahl 2013). Municipalities' and schools' positions and ways of acting have changed, as well as what it means to be a teacher, head teacher, student and parent (Ball and Youdell 2008). Basil Bernstein summarized this development well in his last book:

The principles of the market and its managers are more and more the managers of the policy and practices of education. Market relevance is becoming the key orientation for the selection of discourses, their relation to each other, their forms and their research. This movement has profound implications from the primary school to the university (Bernstein 2000, p. 86).

Secondly, the character and working of education politics are quite different from what they used to be only some decades ago, which has affected the kinds of knowledge being requested at the policy and media arenas. More and new actors emerge, some with a potential of knowledge production and knowledge brokering: the large supranational organizations, for example the OECD, EU, UNESCO, and the World Bank/International Monetary Fund, private and semi-private foundations, think tanks and lobbyists, media channels and networks connecting these various actors with representatives of business organisations and politics. To a high extent following a media logic, the pace of political action has speeded up, changing the form and content of political messages. For example, there is a preference for catchy one-liners rather than lengthy presentations and programs. At the same time politicians want their messages to appear well founded, rational (non-ideological) and legitimate, which renders references to scientific evidence attractive – but, as I discuss below, the relationship with researchers is far from unproblematic.

Even if the concepts of social justice, equality, inclusion and fostering of democratic values have remained in the national curricula, they appear relatively sparsely in the political debate, compared to discourses on student achievement and the quality and efficiency of schools. Looking for 'best practice' and 'what works', and competing in international assessments like PISA and TIMSS not only decontextualises much of what is going on in education at the national and local levels – it also tends to exclude more elaborated political visions of future education other than 'being the best'.

The above changes put new demands on research and on knowledge production more generally. Few countries have gone as far as the USA, giving a detailed definition of scientific research standards and scientifically valid research in the federal Education Sciences Reform Act of 2002 (Kuenzi and Stoll 2014; Lundahl 2013). Nevertheless, there is a clear tendency that politicians ask for concrete measures, quick overviews and fast deliveries of results that are expected to help governing

[1] Research project *Hollowing Out of Public Education Systems? Private Actors in Compulsory Schooling in Finland, Sweden and New Zealand (HOPES)*. PI: professor Piia Seppänen, University of Turku. The project is funded by the Finnish Academy. https://blogit.utu.fi/hopes/

schools more efficiently, improving teachers' work and students' results. Research communication is however commonly too complex to clearly fit the dominant policy strategies, and the time perspectives of politicians and researchers are not aligned. As Conor Ryan, former educational advisor of Tony Blair, expressed in an interview:

> One of the problems with research can be that the political timescale that people are operating in is fairly speedy, fairly short-term (…) so the need for politicians to start having evidence of whether something's working or not seems to be, you know, a much shorter period than many researchers were prepared to work in" (Marttila 2014, p. 271).

At the same time, a growing scepticism towards much of educational and social science research for being too theoretical, verbose and difficult to use in the classrooms has become visible, not least in Sweden. Politicians instead turn to researchers, often in economics, and institutes that deliver large-scale data and, preferably, controlled studies. Whether the decision-makers make use of such research is a different thing; history has shown that politics chooses the research that supports their own ideas and avoids results that do not fit. It is, for example, telling that the immensely important decision to introduce school choice by school vouchers and generous tax-funding of private schools in Sweden in the early 1990s was not preceded by any public investigation or efforts of collecting international experience or using research evidence (Alexiadou and Lundahl 2019).

The present volume on the production, interpretations and enactment of so-called evidence-based politics and education in the five Nordic countries is situated in this changed political landscape. Presenting the five cases in their wider historical and social contexts contributes to the fruitful analyses of common and different approaches to the 'what works' approach, of relevance and interest not only within the Nordic region but far outside of it.

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Part I
Introduction

Chapter 1
Nordic School Policy Approaches to Evidence, Social Technologies and Transnational Collaboration

Lejf Moos and John Benedicto Krejsler

Abstract This volume gives an overview of how national school policies in the five different Nordic countries have produced, interpreted and practiced different – yet similar – approaches to evidence, social technologies and collaborations in transnational forums like the OECD, EU, and IEA. The national policy developments and situations are seen in the context of transnational and global influences and as producers of and simultaneously consumers of, Nordic influences. We investigate social technologies, like evidence and what works, as major carriers of influence.

The analyses and discussions in the chapters of this volume are built on reports from the school systems of the five Nordic countries: Denmark, Finland, Iceland, Norway and Sweden. The country reports are constructed on the basis of a shared format for analyzing the particular contexts that each national school policy and practice emerges from in terms of society, politics, governance, professions and education. The comparisons of country reports and thematic chapters unveil similarities and differences that are central to understanding the ways that the different Nordic countries cope with transnational policy advice and policy formats.

Keywords Comparison · Nordic-ness · Governance · School reform · Evidence

Introduction

We explore the phenomenon of *the Nordic* in its complex apparitions between the discursive myth of a coherent bloc of progressive and egalitarian welfare states and the cumbersome realities of political alliances that operate in more modest and conflictual realities. In international conversations this ambiguous entity called the Nordic appears in monikers like 'the Nordic education model', 'the Nordic way of

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regulating labor market and parliamentary democracy', 'Nordic ways of thinking and behaving', and so forth (Andersen et al., 2007; Telhaug, Mediås, & Aasen, 2006). On the other hand, we know from a number of studies of our own and of colleagues, that it is difficult to point at Nordic uniformity, when coming closer to actual policy, research and practices. This introduction and the chapters of this book aim at clarifying this ambiguity of the Nordic with a focus on school policy, research and practice.

We have chosen to focus upon comprehensive school, i.e. primary and lower secondary school: It allows us to delimit our task and get sufficiently into detail to appreciate the similarities and differences among the different Nordic countries. Furthermore, school comes across as exemplary in the sense that it deals with basic socialization, democratic Bildung, is closely related to building national narratives, and hereby becomes particularly sensitive as an issue for public and policy debate.

Mapping what counts as evidence in school and education in five mutually different countries with each their educational systems is an arduous task that includes identifying the particularities of different societal and historical contexts and their configurations of dominant players in relation to education. In this introductory chapter we shall, furthermore, introduce theory of global and national educational policies, theory of governance at diverse levels (transnational, national and local), and theory of education in order to place the Nordic case in a broader global perspective.

Debate about 'evidence' and 'best practice' in education often deals with the binary between commonalities and differences. The crucial question here is, whether you can identify causal relations or at least correlations in education that demonstrate what works, or maybe what does not work, *irrespective of context* (Eryaman & Schneider, 2017; Krejsler, 2017). On the other hand, it is often claimed, that context matters so much that talking about 'evidence' or 'what works' without reference to national and local contexts and their particularities makes no sense. And, to put the argument a little on the edge, one could argue that within policy and associated research paradigms (often school effectiveness) the Nordic countries have often tilted more towards the 'context matters' approaches as opposed to mainstream Anglo-American approaches that have more often tilted towards looking for commonalities. The former often privilege more qualitative approaches whereas the latter more often give preference to more quantitative approaches, although this divide should not be overemphasized, as both approaches apply in both traditions. Nonetheless, one could mention the OECD, 2004 Washington meeting on 'evidence'. Here an evidence-based faith in global evidence and the priority of Randomized Controlled Trials on the part of the United States was met with a largely Nordic voice that emphasized the importance of context as well as the importance of recognizing many sources of 'evidence' (Hansen & Rieper, 2008, pp. 7–8; OECD, 2004).

Next we shall discuss the need for proper context analyses when comparing education and governance. We shall do that by providing a short analysis of the Nordic societies and policies in a historic perspective with a view to transnational collaborations. Hereafter, we shall give an account of general and Nordic governance concepts, models, social technologies and theories, followed by a short overview of

general and Nordic educational theories and structures. In the final section, we shall introduce theory and practice of social technologies like evidence and best practice and their relations to Nordic school policy, research and practice.

Comparison

Comparisons (Moos, 2013) are employed as tools for research on policy and education and by policymakers (Steiner-Khamsi, 2010). Comparative researchers use comparisons to sharpen their view in order to get a clearer picture of practices and politics, while policy makers use comparisons, when setting policy agendas based on international evidence, best practice, or international standards. It is thus very important to gain a better understanding of the institutional contexts (Leithwood & Riehl, 2003) and the historical and societal backgrounds that education is embedded in, since educational thinking and practices and their associated individual and community social capital (Bourdieu & Passeron, 1990) are formed by the society, culture, and context of which they are a part. They are shaped by policies, discourses, and literature, but also by national/local values, traditions, structures, and practices. Comparative education has acquired particular traits as school and education policy have turned transnational on a global scale where Anglo-American networks have been particularly influential (Krejsler, 2020; Rizvi & Lingard, 2010). These developments have acquired widespread and profound influence in Europe where the so-called transnational turn in school and education policy have since the 1990's been agenda-setting for national school and education policy. These policy processes have been institutionalized in particular in the four transnational giants in European education policy: the OECD, EU, IEA and the Bologna Process (Brøgger, 2018; Elfert, 2013; Krejsler, 2018; Lawn & Grek, 2012b; Meyer & Benavot, 2013; Nóvoa & Lawn, 2002).

Methods of comparison in research have attracted a great deal of scholarly attention in recent years (Carney, 2008; Steiner-Khamsi, 2006, 2009, 2010; Walker & Dimmock, 2002), as has the political work on transferring policies from one context to other contexts. However, as Gita Steiner-Khamsi (2010, p. 332) argues, policy transfer is not a passive process. It is mediated, shaped, and given form by local policymakers. Traveling reform undergoes many modifications depending on the political situation, while some of the core logics within interpretations of evidence and best practice are still prevailing.

Buzzwords such as accountability, equity, and standards are global "fluid signifiers" or "floating signifiers" that are given content and meaning in context according to Moos (2013). This suggests that a cultural struggle is raging about the rights to define what counts as evidence about What Works within different fields, which amounts to what Ernesto Laclau (1993) called a floating signifier, i.e. an open concept that may be employed to generate a variety of different meanings (Krejsler, 2017). The current political climate abounds with dominant floating signifiers such as 'quality', 'efficiency' and 'excellence'. These signifiers travel as keywords across countries and disciplinary boundaries. Being instrumental to carrying dominant

external stakeholders' interests, they set new agendas and dislocate established truths. A particular feature of the floating signifier, however, is that you cannot disagree until it is made specific. This means that unless comparisons in international research projects include the national and local contexts, structures, cultures, and values that make up school and education in participating countries, results from such comparisons will end up being at such general levels that they become meaningless: "Without contextual comparison it is impossible to understand the political and economic reasons why traveling reforms are borrowed" (Steiner-Khamsi, 2010, p. 339).

Stephen Ball (Ball, Maguire, & Braun, 2012) argues that educational institutions are mostly loosely coupled to the political system, which means that policies need to be enacted by the institutions: they interpret and negotiate policies, they 'do' policy, in order to make it fit to existing practices. This underscores the need to explicate and investigate the contexts at multiple levels of governance. Kjell Arne Røvik, the Scandinavian neo-institutional theorist (2011), gives more details. He invokes the metaphor of a virus infection when identifying the ways in which the generic structures of political ideas – viruses – are translated, changed or mutate in the interactions with local culture and values. Translation may occur through rules of copying, subtraction (neglecting or omitting aspects), adding (elements of local culture), or alteration (completely reshaping). A special variant of translation is renaming, meaning that a well-known (global) concept is given a local name. This may fool the internal "immune system" or defense system, and it may also fool external observers. This notion highlights the observation that policies and ideas are social constructions that are subject to transforming into "fluid or floating signifiers," i.e., empty concepts that are formed only when used, and which, when formed, signify diverse meanings.

Nordicness: Reality or Myth?

The Nordic countries consist of five nations (Blossing, Imsen, & Moos, 2013b; Hilson, 2008; Nordstrom, 2000) Denmark, Finland, Iceland, Norway and Sweden and the self-governing areas the Åland Islands (a predominantly Swedish-speaking area belonging to Finland), the Faroe Islands, and Greenland (with partial autonomy in the Home Rule arrangement with Denmark).

Middle Ages to 1900

The Nordic countries have a long history together, which has put its stamp on their political institutions, societies and cultures (Nordstrom, 2000). In practice and historically speaking Danish, Norwegian and Swedish are very similar languages of Germanic origin. While Norway and Iceland shared the same old Norse language

until around 1450, at that time Danish and Swedish started the transformation to modern languages. Finnish is different from the other Nordic languages and belongs to the Finno-Ugric language tree together with Estonian and Hungarian. Finland has, however, had a sizeable Swedish-speaking minority since the Middle Ages.

The Scandinavian language community reflects the close political relations between the Nordic states. For most of the period from 1300 to the 1800s the kingdoms of Sweden, Denmark and Norway formed political unions, in pairs or all three of them. From 1397–1523 Denmark, Norway and Sweden formed a personal union, the Kalmar Union. They shared kings and queens, who ruled over largely independent kingdoms that also included Finland, Greenland, the Faroe Islands, Iceland, parts of Northern Germany and the Baltic states. When Sweden broke out of the Danish-dominated union in 1523, Norway and Denmark continued together until 1814. Then Sweden took over the rule of Norway until 1905 in a personal union with common foreign and defense policy but otherwise large autonomy for each country. During the first centuries Iceland was part of Norway, but in 1814 it was included in Denmark for a good hundred years.

Our modern Nordic national states are a product of the political upheavals that followed in the wake of the French Revolution and the Napoleonic wars. Finland, which had been part of Sweden since the Middle Ages was made a grand duchy under the Russian tsar in 1809. Finland obtained full sovereignty and independence in 1917.

The Nordic countries retained their common features, which were strengthened as a result of Scandinavian national romantic movements in the nineteenth century and a strong sense of common historical and cultural heritage. All the Nordic national states abolished absolutism and introduced democratic constitutions. Moreover, they could count on a long tradition of rule by law. And finally, social inequality was never as pronounced as on the Continent. Strong and self-ruling rural communities characterize the Nordic model, which is well documented, especially in Sweden and Norway, from the late Middle Ages onwards.

The periods of personal unions illustrate the relations between Nordic countries well: I.e., there is a sovereign, ruling all of the populations, but they formed loose couplings to the populations, leaving them to decide for themselves, how they wanted to live. Joint and binding decisions were rarely made. One feature of this kind of relations was the open society. There were no strictly controlled borders between Nordic countries except during emergencies of war or due to fears of immigration.

The myth of Nordic/Scandinavian brotherhood had its heyday during national romanticism in the mid nineteenth century, which hit most of Europe and refers to key German philosophers like Herder and Fichte. During this age of nation building and celebration of the People, its land and its spirit Denmark got into a conflict-ridden relationship with Germany during its process of national formation under the leadership of Prussia, as about a third of the population of the Danish state was German speaking. There were a lot of meetings and loud statements about Scandinavian solidarity based on perceptions of a common history, common languages, and common destiny and spirit and so forth. When it came to war of 1864 between Prussian and Austrian led German coalitions, however, this solidarity never materialized in military support and Denmark lost sizeable land and a third of its population.

Twentieth Century

An important political force during the twentieth century has been the working-class movement, the unions as well as the political organizations. Large social democratic parties have been dominating in politics, especially in Sweden, Norway and Denmark. Together with liberals they pursued the democratization of society and humanizing of the labor market. In Finland the antagonism between right and left led to a civil war in 1918 where the right wing won.

Between World War I and II the democratization in many of the European nations was threatened by Communist, Fascist and Nazi dictatorships, which, however, did not extend much into the Nordic countries. Here democratization proceeded in coalitions between parties to create a more stable parliamentary situation, which included collaboration between the employers' associations and unions concerning the labor market. Gradually the idea of the welfare state was born; and from around the middle of the 1900s, important foundations were laid with state financed pensions, sickness pension, unemployment insurance, maternity leave and additional welfare issues etc.

Post World War II: Welfare – and Competition States

The Nordic countries established welfare societies with many similarities in the 1950s and 1960s according to social democratically led social-engineering and planning models (Hilson, 2008). Those were models that found a middle ground between an Anglo-Saxon market model and continental models where the state plays a bigger role. The Nordic countries were thus orienting themselves towards a more collaborative and symbiotic model where state and market collaborate in a combination of free market, welfare state, and collective bargaining. In Denmark a flexicurity model has developed that makes it easy for employers to sack employees, while the unemployed got economic assistance from the state, so industry gets flexibility and workers security. In Sweden, on the other hand, they have put larger emphasis on job security, although this is currently challenged as pressure for a flexicurity model is on the rise. The period was characterized by social democratic governments that were very pragmatic and consensus-oriented, where economists and social scientists played a big role in long-term and large-scale planning of society and its infrastructure according to Keynesian models for handling a capitalist market economy. It is different from other types of welfare states by its emphasis on maximizing labor force participation, promoting gender equality, and extensive benefit levels. Large levels of income redistribution, and extensive use of expansionary fiscal policy characterize these Nordic models.

Despite their differences all Nordic countries share a broad commitment to social cohesion and the universal nature of welfare provision. This safeguards individualism by providing protection for vulnerable individuals and groups in society and it

maximizes public participation in social decision-making. It is characterized by flexibility and openness to innovation in the provision of welfare.

Economically the five small nations were strongly dependent on foreign trade. After World War II a number of trans-national agencies were established, often with American leadership, of which the most important are the Organization for Economic Cooperation and Development (OECD), the World Trade Organization (WTO), the World Bank (WB), and later on the European Union (EU). To begin with the Nordic nations acted similarly by engaging in EFTA (the European Free Trade Association), but when Great Britain joined the EEC (the European Economic Community (later EU)) in 1973, the Nordic countries were divided. Denmark joined in 1973, Sweden and Finland two decades later in 1995. Norway and Iceland are still not members of the union in 2020. As a region the Nordic countries have both strengthened and weakened their position in the new Europe. The collaboration in the Nordic Council and the Nordic Council of Ministers has taken on a weaker and more cultural than political profile, as the nations have chosen different solutions in relation to the European Union.

Parallel to the establishment of the transnational agencies, and along the same fundamental market-place logics, new ways of governing public sectors and institutions were produced: the neo-liberal economic model. It had its origin in the late 1970'ies in Thatcher's England and Reagan's America and would exert great influence on how Nordic states chose to structure their public sectors. Core features are inspiration from private enterprises, hard top-down principal-agent steering, efficiency and outcomes focus related to global competition and steering through contracts (see governance section below).

Globalization has also resulted in large immigration. During the 1960s there was an extensive influx of foreign labor. After 1970 the influx of refugees has been large. In the wake of the refugee crisis in 2015, however, it became clear that Sweden has taken by far the highest percentage of immigrants in relation to its population with Norway in a second position (see https://pub.norden.org/nord2020-001/nord2020-001.pdf, p. 41). All Nordic countries, nonetheless, have become more or less multicultural. Especially the immigration and influx of refugees from Islamic nations has caused debate. In all of the Nordic countries there is a lively debate on the more or less successful integration of new citizens, where some talk about a threat to the national identity, and others about the risk of nationalism and hostility towards foreigners. In 2015, the refugee crisis led Sweden to establish border control of travelers from Denmark, for the first time in Nordic history. And in the wake of Covid-19 crisis in 2020, Denmark, Norway and Finland established border control of travelers from Sweden, which Sweden eventually reciprocated as well.

In the early twenty-first century unifying bonds still exist between the Nordic countries. They are all welfare states and are characterized by stable parliamentary democracies, low levels of violence in society, extensive equality between men and women and a well-organized labor market. As a region in Europe their unifying characteristics are visible in such everyday phenomena as wide-spread early childhood education and care provision and high levels of women in the labor market.

Summing up (Telhaug et al., 2006), the Nordic education model exists, at least as an ideal and as a difficultly defined reality. It consists of manifold effects of close

collaborations for centuries, which become visible in Nordic welfare states, a common labor market model and a sustained economic growth model with a focus on equality. That model, however, is contested by the neo-liberal trend, challenging traditional educational values like social inclusion of all students, comprehensiveness of education, democratic values, social equality and a focus on community (Arnesen & Lundahl, 2006; Blossing, Imsen, & Moos, 2014; Imsen, Blossing, & Moos, 2016).

Global Education Policy

Moving our focus from the Nordic countries to a global level, we see that a common set of neoliberal education discourses and technologies are applied in many contexts. These tendencies are analyzed in many research projects, however, often without giving accounts of how and why policies are constructed and how they are taken from global, transnational over national to local agendas and practices. A national perspective on educational development is often obscuring the understanding of the interconnectedness, influences and relations between these different policy levels and policy agents (Verger, Novelli, & Altinyelken, 2018).

Analyses of social technologies relating to evidence-based education and What Works are often made on a national level but often omit how those technologies are linked to and dependent on larger political forces. If analyses of a What Works-technology like 'Visible Learning' based on John Hattie's research (Hattie & Larsen, 2020) are restricted to focusing on its impact on national teaching and education it may risk losing view of how closely this technology is related, aims- and logics-wise, to many other contemporary policy technologies and discourses like international standards, measurements and digitalization. These kinds of analyses within the education sphere and institutions and in educational philosophy are often not sufficiently aware of the fundamental influences of economy, sociological facts and general politics: Often times one will find that school development initiatives are not initiated on the basis of educational ideas, but on economy and governance needs and logics.

School development analyses often make themselves blind to the groundbreaking shifts from state-governance towards private-management that take place across the world supported and subsidized by transnational agencies, like the OECD (Ball, 2012, 2015).

Global Governance

Theory on governance (Foucault, 1983; Pereyra & Franklin, 2014; Popkewitz & Brennan, 1998) helps us to understand how power relations and interplays between agencies and agents work at many policy levels, be they transnational, national,

regional, local or institutional. That is relevant for our investigations here, because the core concepts of evidence and best practices are social technologies of governance, they are used by policy makers and administrators to influence agents and agencies to think and act according to certain values and logics.

To get an overview of the governance trends, we need to start by introducing ideas of globalization (Hultqvist, Lindblad, & Popkewitz, 2018; Krejsler, 2020; Moos & Wubbels, 2018; Rizvi & Lingard, 2010; Tröhler, 2013). There have been interactions and collaborations between countries and continents for centuries, but after World War II a particular kind of collaboration accelerated. The nation-state status was supplemented by transnational agencies like the OECD[1] the World Bank, the WTO and the EU. Core logics underpinning each agency are being disseminated rapidly and efficiently. Secondly the military world order changed, so that few individual nations go to war, but leave it to one of the alliances like NATO and, until the fall of the Soviet Union, the Warsaw Pact. This necessitates close collaboration and development of material, personnel and structures along similar lines. Thirdly the international division of labor is changing so that transnational companies have branches in many countries, with consequences for social structures and education. And fourthly, and maybe most important: The capitalist economy is developing towards a world economy in the form of huge marketplaces with increasingly free access and tax and customs exemption for members.

The marketplace develops into a global way of thinking. Marketplace logics talk about producers, commodities, competition and costumers, which extends to all aspects of societies. In this global context Nordic countries usually see themselves as small countries that are, individually as well as collectively, highly dependent upon open liberal markets that are regulated by multilateral agreements that protect small countries from assertive larger players like the United States, China or Russia. Therefore, Nordic countries are very active in transnational forums like the United Nations, the European Union and the OECD, often with agendas that aim at promoting global equality, social and human rights whilst simultaneously embedding economic self-interest.

OECD surveys and country reports exemplify this new trend in global and national governance (Henry, Lingard, Rizvi, & Taylor, 2001; Meyer & Benavot, 2013; OECD, 1995). In nine statements, the OECD claims that governments need to devolve authority and, simultaneously, strengthen steering functions from the center. In line with Principal-Agent top-down theories (Hood, 1991), they propose that the top level issues goals and aims, and leave it to the next levels to implement them. Therefore, aims need to be written in great detail as do the technologies of measuring results and distributing rewards. As mentioned, this trend gained momentum during the 1990s. Currently, it works at many levels: from the ministry's policy units over administrative agencies to municipal authorities and to school leadership.

[1] OECD (the Organisation for Economic Cooperation and Development) – WB (The World Bank) – WTO (The World Trade Organisation) – EU and EC (European Union and European Commission) – NATO (North Atlantic Treaty Organisation) – ASEAN (The Association of Southeast Asian Nations).

Due to the increasing influence of globalization on societies and education, relations between nation states and systems become increasingly interconnected. It could be argued that comparisons gain influence for similar reasons with Nordic countries as active players. Globalization is furthered by transnational agencies that use "soft governance" to advise or encourage reflection on "peer pressure" (Organisation for Economic Cooperation and Development [OECD]) or "open method of coordination" (EU and Bologna Process) (Antunes, 2006; Krejsler, Olsson, & Petersson, 2014; Lange & Alexiadou, 2007; Lawn & Grek, 2012a; Lawn & Lingard, 2002). As these agencies are not allowed to issue government regulations, "hard governance",[2] they set the agenda for policymaking. They do so by funding research or dissemination projects, such as the European Commission Framework Programs, and by comparing educational results. Prominent examples in school policy are the use of international test-based comparisons such as IEA's Progress in International Reading Literacy Study (PIRLS), the Trends in International Mathematics and Science Study (TIMSS), and OECD's Program for International Student Assessment (PISA) (Hopmann, 2008; Meyer & Benavot, 2013; Pereyra, Kotthoff, & Cowen, 2011), all of which have impacted school as well as teacher education policy and discourse profoundly in Nordic countries (Krejsler, Olsson, & Petersson, 2014, 2018). If national politicians in any country find it difficult to reach an agreement on educational politics, they can build momentum by pointing to a third policy option – a best practice – borrowed from elsewhere (Steiner-Khamsi, 2010, p. 324). Therefore, borrowing a reform from elsewhere does not occur because the reform is better but because it has a pacifying effect on domestic conflicts (Steiner-Khamsi, 2006). International comparisons act as mirrors – just like educational outcomes or best practice. They allow policymakers to reflect upon the level of educational outcomes in their own systems as a precursor to launching their own reforms. More often than previously, we see policymakers legitimize reform with the need to comply with global or international standards or best practices, such as PISA.

New Public Management: Management by Objectives and Outcomes

The neo-liberal model of governance and New Public Management is characterized by diverse combinations of three themes (Dunleavy, Margetts, Bastow, & Tinkler, 2005): *disintegration* of public sectors into semi-autonomous units at several levels – national, regional, local, and institutional – and at each level there are initiatives that involve private companies and consultancies that enter the broad

[2] Since the Maastricht Treaty of 1992 there has been some leeway for the European Commission to take initiatives to and coordinate education initiatives between the member states, but always with respect to the principle of subsidiarity, meaning that decisions should be made on the national level, if nations decide so.

competition for contracts; relations between areas are guided by competition between providers, and by contracts between levels, followed by *incentivization*, with pecuniary rewards based on performance (Bovbjerg, Krause-Jensen, Wright, Brorholt, & Moos, 2011). Those features are taken in by Nordic governments at different times, speed and form, and the country reports will show how each system is acting on this type of governance.

Disintegration is seen between levels such as the national government, the municipality, and the institution. Ministries are fragmented into departments and agencies. The ministry sees itself as a single co-operative (group) with one department and a number of contracted agencies. Contracts are negotiated and managed on the basis of an MBO/MBR (management by objectives and management by results) model. That is also the model they recommend and disseminate to other ministries and their agencies, including relations between agencies, and municipalities and institutions. This is a reason that education is increasingly focused on national and international standards (e.g. the OECD competences) and outcomes, such as results from national and international surveys and comparisons, and demand for evidence-based practice and best practice.

The *competition for contracts* is another aspect of the disintegration of the public sector. It has been broadened over the past decade, as more private consultancies have been invited to submit tenders for contracts. In line with English experiences (Gunter & Mills, 2017), we see that ministries and agencies make use of private consultancies. But the contract also makes it necessary to be very clear and detailed in setting the standards for the services provided and at the same time have rigorous and unified means of measuring the results and outcomes. That is part of the explanation of the fast-growing need for metrics and statistic (Moos, 2019).

The *incentivization*, linking performance to pecuniary rewards, is linked closely to the contracts as they can stipulate special rewards for fulfilling the contract goals. This feature seems not to be very widespread in Nordic systems. One of the forms, being used in Nordic education governance, is the 'by-passing' of municipal agencies in national governance. This occurs, when national agencies decide on detailed national aims and ways to measure the outcomes, leaving only implementation to municipalities (Paulsen & Moos, 2014).

Social Technologies

The competition- and outcomes-oriented discourse and associated practices, contain more social technologies than previously seen in the history of education and educational theory e.g. (Krejsler, 2006; Moos, Krejsler, & Kofod, 2009). Social technologies may be seen as silent carriers of power. They are made for a purpose – often hidden from the practitioners – and they specify ways of acting. Therefore, such social technologies overwhelmingly represent a non-deliberative practice, steered and managed top-down (Dean, 1999, page 31). The contracts are, as discussed in the Danish Country Report, also technologies (Rose, 1999) for

constructing premises based on value decisions made at the superior level drawing on dominant discourses. One subcategory of the technology of agency is relational technology that includes specialized ways of conducting meetings, interviews, school–parent communication, and the leadership of teacher teams and classrooms. Standards for such meetings, interviews and management, have often developed over time in practice, as authorities prescribe/advise practitioners to establish more effective, appreciative communication.

The vision of education for competition is built on a core logic set: management by objectives and outcomes-based accountability. Proponents of this discourse often refer to scientific management and the scientific curriculum as core theoretical basis (Blossing et al., 2013b; Blossing, Imsen, & Moos, 2013a; Moos, Nihlfors, & Paulsen, 2016a, 2016b). It is fundamentally concerned with centralizing power at the political level, i.e. to parliament and government, as is demonstrated in the Swedish and Norwegian country reports. Similarly, the scientific curriculum hides the power to decide on purpose, content, relations and methods of education behind the pretexts of expertise and judgement-free decisions.

Education Systems and Discourses, and the Particularly Nordic Features

The Nordic countries used to have an international reputation for progressive and well-functioning school systems (Telhaug et al., 2006). Here it makes sense to focus on the post-WW2 reshaping of Nordic school systems in line with the social democrat led reforms of society (Hilson, 2008). In Nordic social democratic strategies of planning society the pursuit of increasing equity is closely linked to taking advantage of a capitalist market. So when, with the rise of human resource and human capital theory education was increasingly associated with economic growth, school was simultaneously seen as a key provider of opportunity and equality to all members of society, based on universal access to an egalitarian oriented public school for all. Therefore, the basic struggle in Nordic schools became the struggle to abolish streaming in secondary school, i.e. the creation of a truly comprehensive and unified school up till the end of lower secondary school (Imsen et al., 2016). School would be an instrument to socializing pupils to become democratic citizens in a broader sense. School would be a place to ensure social cohesion as children and families of all social classes would meet here. The ideal would be meritocratic in the sense that everyone should have the opportunity to develop their potential.

Private or free schools have been treated very differently in the Nordic countries.

In terms of pedagogy Nordic countries have gained international reputation for sponsoring a child-centered and reform pedagogy inspired approach to organizing school life. Up till the 1980s, educational research and policy discourse thus opposed rote learning pedagogy of the so-called ‘Rote Learning school’ and encouraged a progressive pedagogy that would foster democratic, happy and capable citizens,

albeit this was always done on the backdrop of conservative resistance to relinquishing disciplinary learning. Many would say that in practice school retained most of the vestiges of traditional schooling in the form of traditional teacher-governed classroom teaching. It was, nonetheless, a school that sought to minimize testing and homework, allowing school to be a room for socializing to life in a democratic society in a broader sense.

School Reforms

The educational reform movement in Nordic countries at the beginning of the twentieth century was an amalgam of both continental and American influences that was brought about by educationally pioneering schools that broke with "tradition" and developed new programs. Well-known European contributions included Georg Kerschensteiner's "Arbeitsschule" (labor schools) in Germany, Makarenko's experimental democratic school in the Soviet Union and Ellen Key's child-centered ideas about the "The Century of the Child" in Sweden (Blossing et al., 2013a). From the US, John Dewey's progressivism has been the main inspiration for the school reform movement, as well as the project method developed by his student William H. Kilpatrick. John Dewey's philosophy has undoubtedly had long-lasting impact, in particular his belief in activity-based pedagogy and the slogan of "Learning by doing". This became an important ideological foundation for a comprehensive school system embracing all children throughout most of the twentieth century.

Nordic schools have been developed and reformed simultaneously during the post WW2 period. Telhaug et al. (2006) identifies three stages within that period. The first is the golden years of social democracy up to 1970. A main structure was established with 6 years elementary and 3 years lower secondary levels. The second period, from around 1970 onwards, is called the radical left period or the golden age of progressivism with inspiration from progressive education, cross-disciplinary project work, open schools and neo-Marxist emancipatory ideology, enacted in classroom practice. The third period from the 1980'ies, is the era of globalization and neoliberalism, when the new right, new forms of management and marked-inspired technologies were introduced.

At present we see two prevailing discourses that frame how we can legitimately verbalize or talk about social phenomena like education (Moos & Wubbels, 2018). One of the two emerged from the welfare state model and may be called the "Democratic Bildung Discourse." Based on Wolfgang Klafki' work (2001) we name this understanding of general and comprehensive education Democratic Bildung, because the intention is to position children in the world, in democratic communities and societies in ways that make them competent in understanding and deliberating with other people. Klafki sums up the discussion in three points: General education should mean education for everyone to qualify their abilities for self-determination, participation and solidarity; a critical rethinking of the general

education; and an understanding of education as developing all human capabilities (Klafki, 1983/2001).

The other is associated with the competition state (a vision with roots in the 1980s), and we call it the "Outcomes Discourse" (Moos, 2017). In this discourse the fundamental outcomes of education are understood in terms of measurable students' learning outcomes. In this vision there is a tendency to homogenize educational practices in terms of a more discipline-oriented standard-based education. Consequently, focus on testing and basic skills has returned since the millennium shift with the aid of widespread PISA shocks in national education debates, albeit in the cloak of knowledge economy demands for a better qualified and more flexible work force in terms life-long and life-wide learners (Telhaug et al., 2006). This vision of education thus intends first and foremost to provide to a nation a good position in the global race among knowledge economies as constructed by international comparative surveys such as the Program for International Student Assessment (PISA).

In order for an educational system to be competitive, education needs to "produce" students with high levels of attainment. Therefore, in the outcomes discourse, education is being constructed along 'management-by-objective' and 'management-by-result' lines: The government draws up the aims and measures the outcomes, while schools, teachers and students need to learn to correctly answer test questions. The curriculum that is developed for this situation has a scientific structure: experts know how to attain their (often political) ends, and they describe every step for schools, teachers and students to be followed in detail. In this orientation, there is a focus on 'back to basics' and 'back to skills' as these are easily measured.

The vision of education for the competition state is built on a set of core theories (Cerny & Evans, 1999; Pedersen, 2011): management by objectives and outcomes-based accountability. Proponents of this discourse often refer to parallel theories like scientific management and the scientific curriculum as core theoretical bases (Blossing et al., 2013a), and they point to a variety of social technologies, they find useful for this purpose, like evidence and best practice. Proponents of these theories are fundamentally concerned with centralizing power. Furthermore, the scientific curriculum hides the power to decide on the purpose, content, relations and methods of education behind the pretexts of expertise and value-free decisions.

School reforms and, by implication, teacher education reforms have increasingly been marked by the intensive participation of Nordic countries in transnational collaborations within an increasingly active European framework of collaboration. This mostly takes place within the OECD (e.g. PISA, country reports, Education at a Glance), the EU (e.g. the European Qualification Framework, the European Education and Training Monitor, the European Education Area), IEA (e.g. PIRLS, TIMSS and ICCS) and in relation higher education (including teacher education) the Bologna Process (Klette, Carlgren, Rasmussen, & Simola, 2002; Krejsler, Olsson, & Petersson, 2014, 2018; Skagen, 2006).

Digital Education and eduBusiness

Social technologies are important factors in the global homogenization of education (Moos, 2018). This tendency has reached a stage where big multinational corporations are interested in the education market. Consultancies, like Pearson, Price Waterhouse Cooper, LEGO Foundation and McKinsey, and philanthropically oriented foundations as well like the Bill and Melinda Gates Foundation and the Hewlett Foundation, have become very active in developing and spreading educational and governance packages worldwide (Ball, 2012, 2015; Gunter & Mills, 2017; Verger, Lubienski, & Steiner-Khamsi, 2016) as is demonstrated in the Danish, Norwegian and Swedish country reports. These corporations are pivotal actors and agents of a global homogenization, streamlining education as standardized commodities with the aid of digitalizing programs. They harvest and manage "big data" through algorithms in huge databases from global tests and learning programs (Williamson, 2016) and hence support downgrading the importance of national and local cultures.

In the Nordic educational systems we see to differing degrees how policy makers aim at replacing face-to-face or written relations between professionals, students and parents with digital educational/learning platforms or environments.

Evidence and What Works

In stark contrast to its genesis within the medical field, the evidence discourse has been launched into the field of education by external stakeholders in mostly top-down moves that have largely bypassed professionals within the field (Hammersley, 2007; Krejsler, 2017). This has taken place in many countries and in different shapes also across the Nordic countries (e.g. Bergmark & Lundström, 2006; Oscarsson, 2006; Telhaug et al., 2006; Utdanningsforbundet, 2008) and beyond, globally (Furlong, Cochran-Smith, & Brennan, 2009; Furlong, McNamara, Campbell, Howson, & Lewis, 2009; Henry et al., 2001; Hopmann, 2008; Meyer & Benavot, 2013; OECD, 2007; Rizvi & Lingard, 2010; Wells, 2007).

The evidence discourse mirrors a cultural struggle that currently rages about how key areas within modern societies are to be defined (G. Biesta, 2007, 2010; Eryaman & Schneider, 2017; Gibbons et al. 1994; Hammersley, 2013). How we perceive evidence for what works has significant implications regarding how a hospital or a school may conceive of their visions, targets and practices, and what kinds of research and research paradigms are considered legitimate in the production of knowledge. A too strict focus on Randomized Controlled Trials (RCT tests) in the health services and education will tend to marginalize other and 'softer' professional practices of validation. In other words, discourses about the population's health and education proliferate in close reciprocity with the criteria for verification that such knowledge is subjected to. Health and educational issues must be

conceived of in ways that somehow satisfy the criteria for producing evidence that mandate powers funding those activities demand.

School policy has been particularly influenced by the evidence and what works discourse in the forms of comparative surveys, in the forms of public policy being increasingly subjected to evidence and what works formats, and in the forms of particular evidence concept packages sweeping over the schools of Nordic countries like 'Visible Learning', 'The LP-model' and a number of more specific evidence-packages (often with Anglo American origins, like e.g. 'the Incredible Years' or 'Positive Behavioral Interventions and Supports').

In order to qualify debate about what criteria should be applied to identify 'what works' and 'what does not work' in education, we suggest that you could draw inspiration from the following distinctions (Krejsler, 2017): (1) the distinction between evidence-based vs evidence-informed knowledge, i.e. distinguishing between issues that merit so-called 'hard' and others that merit 'soft' evidence approaches to evaluating what works. (2) the distinction between global vs local forms of evidence highlighting that some issues merit knowledge that is valid regardless of context, whereas intervention in other contexts requires forms of knowledge that are highly responsive to the particular context of intervention. (3) the distinction between external vs internal evidence problematizing the question about who has the right – or more precisely the executive powers – to make decisions about which forms of evidence count as knowledge that works. This points to the tensions between externally mandated evidence and the considerable production of knowledge and documentation for what works by professionals and educational researchers, which function as supplements or contesting knowledge to the forms of evidence that powerful external stakeholders currently impose on education.

Overview of the Volume

This volume is organized in two main sections: Firstly, country reports from all five countries and, secondly, thematic chapters from the same countries. We asked the authors of the country reports to include analyses and discussions of the issues that are introduced below. We wanted – as mentioned in the comparison section in this chapter, – to have a robust foundation for comparisons of developments, contexts and social technologies. We focus on comparison of issues of power-relations and reciprocity between networks of national, Nordic and transnational societies, agencies and education (Ball & Junemann, 2012). We also wanted to have authors analyze and discuss tendencies and phenomena they found of special interest and urgency in their national educational systems and their relations to the Nordic dimension and transnational agencies. Therefore, they were asked to write thematic chapters where they elaborate more profoundly on particularly salient issues in relation to this publication and its themes. In the final chapter, *The Nordic Dimension in National School Policies and Transnational Social Technologies?*, the editors discuss findings and tendencies from the chapters and conclude upon the Nordic dimension.

Country Reports

The background and context of school and education policies and cultures are important factors for understanding and discussing contemporary influences and relations that impact national education. Therefore, the history of Nordic national social and cultural traditions and thinking need to be described. National and transnational government and governance relations need to be analyzed together with analyses of educational systems and discourses. Going into more detail about school policy and its effects means that we need to supplement those analyses with analyses of the social technologies, used to ensure implementation of discourses. Here the impact of comparative surveys, digitalization, evidence and what works technologies emerge as particularly interesting.

Following up on the issues problematized in the first section of this introduction we asked all authors to include the following issues in their country reports in terms of describing and discussing:

1. *similarities and differences elaborated in this chapter's general description in relation to your nation's particular history, pointing to phenomena that seem to produce Nordicness (like the social-democratic welfare state and its influence on relations). Until 1980 and post 1980.*
2. *development in school and educational structures over the past 40 years.*
3. *global and transnational agency influences on your school policy situation (like soft governance)*
4. *the transnational influences on the national structures and policies*
5. *the development of school governance-relations between national agencies (parliament, ministry, agencies) and local agencies (regional/municipal agencies) and institutions*
6. *which social technologies are made to work in your educational system?*
7. *developments in the balances between educational discourses.*
8. *the stage, your school and educational system has reached in digitalization and its influences on education.*
9. *the background (history) of the particular forms that 'evidence' and 'what works' developments have taken in your country in relation to school,*
10. *the policy networks that made it possible;*
11. *how 'evidence' and 'what works' has resonated with the educational traditions in your country;*
12. *how 'evidence' and 'what works' were received in schools and among professionals (accept >< contestations).*

The Danish country report, *'Denmark: Contracts and Evidence-Based Best Practice'* by Lejf Moos and John Benedicto Krejsler, analyses Danish cultural history, formation of the welfare state and a school and education discourse of general non-affirmative education/Democratic Bildung. That resonates well with the core of Danish society, governance and education. Another line of analysis looks into how globalization, transnational agencies and formation of the competition state

transformed Danish school policy and practice. New conceptions of government in individual nation states thus change into particular conceptions of governance on the basis of transnational policy networks. The country report exemplifies this transformation with the contract, management by objectives and management by outcomes, understood as powerful social technologies that are very commonly used in Denmark.

In the Finnish country report '*Finland – the Late-Comer that Became the Envy of Its Nordic School Competitors',* Risto Rinne elaborates on how Finland has experienced a long history of foreign rules from Sweden and Russia. The chapter demonstrates how Finland has several uniting political, economic cultural and educational features rather similar with the other four Nordic countries: the Nordic welfare model as well as the principle of equality of education to everyone independently of her or his social, ethnic, gender and regional origin. In recent years Finland has become one of the best educational achievers among OECD countries as well as among Nordic counties. The chapter argues that a reason for this may be the fact that during the past two decades Finnish educational politics became closely aligned with the OECD and neoliberal ideas while simultaneously retaining considerable political autonomy.

The Icelandic country report *'The Intricacies of Educational Development in Iceland. Stability or Disruption?*' is written by Jón Torfi Jónasson, Guðrún Ragnarsdóttir, and Valgerður S. Bjarnadóttir. The chapter explores the Icelandic education system using a twofold historical perspective: the very long-term development and then the period 1990–2020. Characteristics of educational development are described within the following key points: the recurrence of ideas like evidence; development is often driven outside legal regulations; importance of the long-term perspective in terms of the inertia of change; the academic drift and the institutionalization of practices. The chapter claims that Icelandic school and educational practice have certainly developed and is being governed. It is not clear, however, whether the latter has had much influence on the former. We see few signs of hard governance and perhaps minor signs of both soft governance and the influence from outside, in particular from OECD through the mechanisms of social technologies like PISA.

The Norwegian country report *'Production, Transforming and Practicing 'What Works' in Education – the case of Norway*' is written by Ann Elisabeth Gunnulfsen and Jorunn Møller. They analyze and discuss key changes in the Norwegian school and educational system during the last 60 years. This period gave rise to a comprehensive education system as well as to a public welfare system. Since the end of the 1980s, the education system went through major reforms, influenced largely by new managerialist ideas. New public management began to gather momentum in the 1990s, followed by an emphasis on 'what works' in schools. Both individuals and organizations have strongly influenced this change in educational policymaking. Although the basic values about equal opportunities and access for all seem to persist, we might see a process of re-imagination of these values through, not least, the digitization in local schools.

The *Swedish* country report *'Evidence in the History of School Reforms in Sweden'* is written by Daniel Sundberg. This chapter addresses the question of what counts as evidence in Swedish education from a historical perspective, with a focus on how different knowledge traditions have informed policy-making and educational reforms in Sweden in four phases: (1) welfare expansion and rational planning of education; (2) the role of research was called into question when the sociology of education brought democracy and equity dimensions into the policy exchange; (3) the practice turns with demands of professionally relevant knowledge, and (4) currently, the contemporary phase is characterized by a downward shift toward instrumentalization as research is becoming a means for "what works" interest as accountability reforms proliferate.

Thematic Chapters

A number of main concepts run across the five thematic chapters: First, internationalization in Chaps. 7 (Anglo American influences) and 8 (Social Democratic History). Second, accountability in Chap. 9 (evidence in Icelandic education) and digitalization in Chaps. 10 (Governance) and 11 (Policy developments). A number of other related concepts are analyzed with clear links to discussions in the country reports.

The Danish thematic Chap. 7 '*Danish – and Nordic – School Policy: its Anglo-American Connections and Influences*' is written by John Benedicto Krejsler & Lejf Moos. It discusses the general trend in pointing to the EU, the OECD, the Bologna Process and the IEA as the main sources for transnational influences on school and educational policy. The chapter demonstrates how this influence draws mostly on Anglo-American sources and then spreads through interplays between European nation-states and these transnational agencies. The more direct uptakes of Anglo-American influences in Danish – and Nordic – school policy have originated from England, New Zealand and Ontario. The chapter, however, elaborates on how these influences are often deeply imbued by the influence of the big and most dominant player in the Anglo-American networks, the United States. The analyses explore a number of particularly influential themes of Anglo-American influence: (1) Human capital and rational choice theory as well as 'knowledge economy' and 'competition state' discourse. (2) The school effectiveness and improvement movement and its association with development and dissemination of ideas of 'knowledge that works' and school reform. (3) The 'evidence' movement that transformed policy conceptions of what works.

Risto Rinne takes another point of departure on international influences, when he writes the Finnish thematic Chap. 8: '*Finland – The Nordic Social Democratic Regime Colliding with the Global Neo-Liberal Regime'*. In order to grasp the implications of the increasing complexity of the emerging multi-scalar/multilevel governance arrangements in each Nordic state, we need to devise, he argues, a new set of lenses, which include the effects and institutionalizations of a pervasive global

neo-liberal regime. Consequently, the traditional notion of the nation state and its national education needs to be supplemented with new players and new ways of thinking about knowledge production and distribution. In Nordic countries, a social democratic welfare model with an associated Nordic or social democratic educational model was constructed. This chapter explores how the global neo-liberal turn transforms national governance and education in terms of new frames of thinking reform, comparisons and associated new standards for research.

The theme of accountability is carried forward in the Icelandic Chap. 9 '*The Status of Evidence in Icelandic Education – and the Nordic Connection?'* written by Jón Torfi Jónasson, Valgerður S. Bjarnadóttir and Guðrún Ragnarsdóttir. Accountability and evidence play prominent roles in modern educational discourse. In a fast-changing culture during the formation of the Icelandic education system the question arises if this might be a modern trend, possibly influenced by neo-liberal rhetoric and new public management. The chapter takes a look at three points in the history of education in Iceland (including the present), and find that some of the current emphasis did exist before but in a different guise. The authors make a scrutiny of attempts throughout Icelandic school history that demonstrate how attempts to inspect education and gather/disseminate evidence for what works were undertaken, albeit in different guises. This puts in perspective current ambitions to improve teaching and literacy performance of young people driven by a national desire to provide good education.

The theme digitalization is analyzed and discussed in bits in the country reports as well as more thoroughly in the final two thematic chapters. In Chap. 10 *'Governance through Digital Formations – the Case of 'What Works' in a Norwegian Education Context'* Ida Lunde and Ann E. Gunnulfsen describe the turn from an educational thinking and practice strongly rooted in social democracy, equity and the welfare state, to an increasing focus on a digitized data-driven school where the 'what works' agenda has become a pivotal matter. Digital technologies are now providers of evidence, and important in identifying what best practice is and what it should be. An assemblage of heterogeneous actors is taking part in digital practices in schools. Relations between them provoke a particular governance agenda of quality assessment.

The Swedish thematic Chap. 11 *'Understanding Swedish Educational Policy Developments in the Field of Digital Education'* is written by Limin Gu and Ola J. Lindberg with a focus on digitalization. The chapter describes and analyzes educational policy with a focus on how the relation between learning and information technology, as well as digitalization and its impact on other aspects of school development and management have been debated over time, and how it has linked to proposals for reforming school practice. During its early years, digital education adopted a clearly centralized and top-down strategy with extensive government investments without taking into account the local needs and conditions. Later, in line with decentralization and marketization of education, the performance turn, more demands have been placed on local responsibility and self-regulating regarding digitalization in school.

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Part II
Country Reports

Chapter 2
Denmark: Contracts and Evidence-Based Best Practice

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Abstract Foundations for national education governance can be found in history and context. Cultures and policies emerge historically in collaboration and interactions with other states and transnational alliances. In the case of Denmark, we see historical relations with Nordic countries and contemporary relations with transnational agencies like the European Union (EU) and the Organization for Economic Cooperation and Development (OECD). We also see the emergence of diverse societal and educational paradigms like a welfare state with democratic education and a competitive state with aims- and outcomes-based education.

Beginning with a short walk over Nordic relations from the Middle Ages till contemporary times, the chapter focuses on fundamental societal change in the post-World War II era.

Through an analysis of Danish cultural history, formation of the welfare state and education discourse of general non-affirmative education/Democratic Bildung, we find strong common trends in values and – although less so – in practices that characterise the core of Danish society, governance and education: believing in and striving for democracy and local autonomy with self-activity, and the struggle to make all levels of society develop into less unequal communities that respect other people and communities.

Another line of analysis looks into globalization, transnational agencies, formation of the competition state and education policy. Here we also find identical trends. The market-place logics are found in the transnational thinking and initiatives, in the move of states from a welfare state to a state competing for success in the global marketplace. New conceptions of government in nation states change into conceptions of governance on the basis of policy networks. One of the social technologies used for this movement is the contract, which is very commonly used in Denmark as well as management by objective and management by outcomes (The concepts used here: neo-liberal globalization as marketplace, globalization and marketplace

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logics can be seen as parallel concepts to the thesis that Michael Hardt and Antonio Negri (2001) developed in analysing the Empire, '*the sovereignty of national and supranational organisms united under a single logic of rule.*' This Empire is decentred and deterritorialised. It has no centre or territory).

Early Nordic Co-existence: War and Peace

Present conceptions and ideas about education, schools and governance are built on present conditions and expectations, structures and discourses, and they are also founded in our history, institutions and culture. In this chapter we shall not give a thorough genealogic analysis; instead we only point at some – what we consider – important features. The analysis is divided into three: Middle ages until the 1970s, the 1970s leading to the present day called 'Transition to Neo-liberal Globalisation', and thirdly, an analysis of the current situation named 'Current Modernisation'.

Denmark has – as a more or less well-delimited geographical entity -been living closely with the Nordic neighbours for more than a thousand years, sometimes at war, sometimes in peace and collaboration. We have shared backgrounds in Nordic history, political institutions, society and culture (Nordstrom, 2000). The term Nordic usually refers to the current independent nation states of Denmark, Iceland, Norway, Sweden and, Finland, as well as the Faroe Islands and Greenland (parts of the Danish Commonwealth [det Danske Rigsfællesskab]) and the Åland Islands (a largely Swedish-speaking part of Finland), the latter with large amounts of local autonomy. The Scandinavian languages – Danish, Norwegian and Swedish – are national variations of the same Germanic language (Blossing, Imsen, & Moos, 2014). The language community reflects the close political and cultural relations between the Nordic peoples.

The Nordic countries have retained their common features, which were strengthened as a result of Scandinavian movements in the nineteenth century and a strong sense of common historical and cultural heritage: like the other Nordic countries, Denmark abolished absolutism and introduced democratic constitutions. Moreover, they have a long tradition of rule by law. And finally, social inequality was never as pronounced as on the European continent. Strong and self-ruling rural communities characterise all Nordic countries (Blossing et al., 2014; Nordstrom, 2000).

The Nordic history has produced a model – or at least a vision – of Nordic education, with focus on social inclusion of all students, comprehensiveness of education, democratic values and a focus on community (Arnesen & Lundahl, 2006; Moos, 2013; Telhaug, Mediås, & Aasen, 2006).

Society and Education

The development of Danish society was based on agriculture, small-scale crafts culture and ways of living, with only very few big industries and farms until the twentieth century. Until the middle of the nineteenth century most people lived in self-sustaining villages and small towns with small power distances. The nineteenth century brought new crises and solutions. Poverty and hunger caused by failing harvests at several periods made many people react in different ways: During the last quarter of the century more than 200,000 people out of a total population of 1.5 million inhabitants emigrated to America. Many agrarian workers migrated to cities and the industrial plants. Dairies and other small farming manufacturing companies were established and run by cooperative movements.

Most primary schools were thus established in the countryside and in villages; they were small and organised in ways that also allowed for working on the family farm. Bigger towns had secondary schools. This special parallel legislation with strong municipal rule lasted until the early twentieth century. In the middle or second half of the twentieth century and coinciding with the reform of the Danish Constitution in 1953, Denmark established a public comprehensive school for children between the ages of 7 and 16. The act built on the experience of running schools for 50–100 years. The constitution states, in line with the first Danish constitution from 1849, that all children shall be educated; it does not say that they shall attend school. It also allows for parents to establish schools that can be free of state and municipal governance, the independent school (*friskole*) according to the Danish Friskole Act of 1855. This movement has gained increased momentum with the result that at the beginning of 2020 more than 17% of all students now attend an independent school.

Between the First and Second World Wars democratisation in many of the European nations was threatened by Communist, Fascist and Nazi dictatorships. The power of these movements was limited in Denmark, and subsequently the process of democratisation went on with party coalitions, creating a more stable parliamentary position, and collaboration between labour market organisations. In the period before World War II, the Danish education system was a stable institution serving diverse societal groups in different school forms. In the same period there was a number of small scale educational experiments, often with inspiration from outside the country: The labour school ('Arbeitsschule') with inspiration from Georg Kerschensteiner; the reform school initiated by Otto Gläckel; Mararenko's experimental democratic school in the Soviet Union; Ellen Keys' child-centred school in Sweden and John Dewey's progressivism in the US (Blossing, Imsen, & Moos, 2013). A general trend in the experiments was the move towards a 'School for All' with inspiration from the Danish pastor, author, poet, philosopher, historian, teacher and politician N.F.S Grundtvig (Rasmussen & Moos, 2013). In spite of the numerous educational experiments one should not, however, underestimate the inertia of tradition in a school where rote-learning was still the norm (Tyack & Cuban, 1995).

The governance of education content, namely the subjects, was for the first decades after the World War II only softly governed by the Parliament and Government: The general purpose and very brief aims for each of the subjects were stated. It was up to the municipalities, schools and teachers to interpret the aims and frames and decide on the methods, materials and social technologies for the actual teaching. The educational thinking was often inspired from German/Nordic Non-affirmative 'Bildung' and Didactics (Uljens & Ylimaki, 2017) and visions about self-activity and activity schools, or the 'living words' and tales, as Grundtvig named this kind of teaching.

Building a Welfare State

History has put its mark on the process of political and social modernization in Denmark and the other Nordic countries from the middle of the nineteenth century to the present: Gradually the idea of the welfare state was born from around the middle of the 1900s. Important foundations were laid including state financed pensions, sickness benefits, unemployment insurance and maternity leave and other welfare issues. It was first and foremost the Social Democratic party that worked hard to secure a welfare state (Danmarkshistorien, 2011). In summary, the state should protect and help its citizens if they needed it in cases of unemployment or sickness.

Denmark developed into a welfare state, characterised by stable a parliamentary democracy, low elements of violence in society, extensive equality between men and women and an organised labor market. The Danish community was more equal than many other societies: the GINI coefficient on equality was 41 out of 100 (WorldBank, 2015), the power distance was 18 out of 100 (Hofstede, 1980) and the general trust in other people was high. For example, within Danish society, 89% of respondents said they trusted other people (OECD, 2011).

Constitutional democracy was introduced in 1848. Centuries of absolutism and autocratic, royal power in combination with nobility and the clerical community were gradually replaced by a more equal parliamentarism: women were given the right of vote in 1908, and the 'Landsting', Parliament's first chamber predominantly represented by conservative nobility and the well-off, was abolished in 1953.

In the same period, on the basis of the Reform Pedagogy Movement mentioned above, and upon the experiences of the inhumanities of the world wars, and thus on the longing for a democratic society and for peaceful collaboration with other nations, the dominant education discourse was that of a comprehensive and progressive education, although this was only partially and slowly translated into school practice (Coninck-Smith, Rasmussen, & Vyff, 2015). Many curriculum decisions were therefore left to the professional teachers ('Didactic discretion') instead of prescribing them from the national level. In order to further democracy at school level, relations were built on trust in professional expertise. This was made clear in the Education Parliamentary Report, also named the 'Blue Parliamentary Report' (Undervisningsministeriet, 1958). The democratic vision was also expressed in the

Article on the purpose of the school in the Act of the Folkeskole (public primary and lower secondary school) from 1993:

> The school shall prepare the students for active participation, joint responsibility, rights and duties in a society based on freedom and democracy. The teaching of the school and its daily life must therefore build on intellectual freedom, equality and democracy (Authors' translation) (Education, 1993)

Government and Governance

Like society in the other Nordic nations, Danish society was built on the basis of the belief in a strong state and in strong local communities. Links between the welfare state and education in Nordic societies were expressed in this way:

> Another key development was the establishment of a safe welfare state. Education for all children was also considered to be the main vehicle for reducing social differences and increasing social mobility among the population. The state was considered to be the legitimate authority to have responsibility for education as a common good. Structurally, the Nordic model consisted of a public, comprehensive school for all children with no streaming from the age of seven to sixteen years. The overarching values were social justice, equity, equal opportunities, inclusion, nation building and democratic participation for all students, regardless of social and cultural background and abilities. The curriculum plans were mainly defined at state level, and schools and teachers were trusted and respected. (Imsen, Blossing, & Moos, 2016).

The labour market was very unstable at the end of the 1800s, with many strikes and lock-outs. The key core of the fights centred around, on the one side, those who were given the right to lead and manage places of work and, on the other side, those who should decide whether employers should be allowed to form trade unions. A general agreement was formed in 1898 with assistance from the Government to form triparty negotiations, the 'September Reconciliation'. Since then the general agreements are formed as triparty negotiations between employers' organisations, workers' unions and the Government. The private labour market has since then been regulated as part of a close collaboration between societal groups.

This model has been the foundation for the Danish flexicurity model: The general agreement provides flexibility for the employer to hire and fire quite freely. On the other hand, the state guarantees employees a unemployment benefits for lost wages. The compensation was around 90% of normal wages up to a certain level at the beginning of the 1980s. This flexicurity model is a combination of labour market decisions and government collaboration (Pedersen, 2011).

The public labor market – state and municipalities – is governed differently from the private market. Up until the 1990s, teachers were employed by the government as civil servants, and their wages and conditions for work were governed at the national level in a straight chain of governance with national frames. Therefore, the general principles were negotiated by the government and the Danish Union of Teachers (DLF).

Gradually, the municipalities and the 'Local Government Denmark' (LGD: the association of municipalities) have taken over ownership of schools and teachers – managing employment, finances and working conditions – and thus agreements are negotiated at national, municipal and school level with appropriate political agencies and teachers' unions.

During the time of the school reform in 2013, the LGD wanted to cancel the traditional form of agreement and 'modernize' the teaching profession. As the Danish Union of Teachers could not agree, teachers and students were locked out for 25 days until Parliament enacted a law, Act 409, in total agreement with the LGD's ideas and thereby ended the lockout. Teachers were made to 'pay for the school reform', as the Minister for Education explained it, by teaching more weekly lessons, having less time for teaching preparation, and by rendering much power and room for manoeuvre to the individual school principal (Moos, 2016b).

Transition to Neo-Liberal Globalisation

An important step in the transition from the Welfare State towards the Competition State was taken when social legislation shifted from assisting needy citizens, towards expecting them to handle their own life. It was also in 1993 that Denmark bought into the European Union's idea of Global Competition presented at the Copenhagen European Council meeting (Pedersen, 2011, p. 42).

Societal and global developments have many sources but no centre. Even so we want to point out one very important source: The Bretton Woods Agreement (News, 2020). The agreement was concluded at the 1944 conference of the World War II Allied nations: USA, Canada, Western Europe, Australia and Japan. Under the agreement, countries promised that their central banks would maintain fixed exchange rates between their currencies and the dollar. The agreement was the basis for the creation of the World Bank (WB), the International Monetary Fund (IMF) and other agencies. The Agreement was later on adjusted, but the American dominated global economic world order persisted.

Thirty years later the neo-liberal states were developed in some front-runner nations: New Zealand, USA and England, and many others followed. In Denmark a newly elected right-wing government led by Poul Schlüter (from the Conservative People's Party) agreed on a Modernization-Programme along those lines and the Minister for Education, Bertel Haarder, wrote education policies with OECD roots: aims- and outcomes-based teaching, national standards and accountability, and strong strategic leadership (Haarder, 1988). The political majority in Parliament did not agree with these ideas and decided on bottom-up initiatives in line with the former welfare state logics. But slowly, over the next two decades, these ideas were recognised: National aims and tests were agreed on and gradually developed.

Since Bretton Woods, the capitalist economy is being developed towards a world economy: huge marketplaces with free access and no barriers to the members' transport of goods, services, finances and citizens. The development was supported

strongly by several big agencies like the World Trade Organization (WTO) (replaced General Agreement of Trade and Tariffs in 1995), the United Nations Children's Fund (UNICEF), the EU, the OECD, and of course as mentioned the IMF and the WB. Those agencies were constructed on the basis of neo-liberal economy thinking and logics. This means that the marketplace is being developed into a global way of thinking: marketplace logics focus on producers, commodities, competition and customers.

The transnational agencies cannot formally issue regulations and legislation, also named 'hard governance', to their member states. Therefore they work to set the agenda for policymaking when they use 'soft governance' to advise or encourage reflection. The OECD names this 'peer pressure' and the European Commission (EC) calls it 'open method of coordination'. The EC funds research or dissemination projects, such as the European Commission Framework Programmes and the Erasmus Programme (Krejsler, 2018).

The OECD uses different forms of soft governance, mainly discourses and social technologies like comparisons, standards and measures (Dean, 1999). Many of their campaigns are a mixture, like the autonomy campaign: It has been obvious that governments struggle with balancing their power-relations with local authorities and citizens, between centralization and decentralization (OECD, 1995). In order to raise this discussion in member nations, the OECD constructed a graph of decision-making models at the national level as well as at the other levels like regional, municipal or organisational. Responses from member governments was the basis for forming an image of the situation in the OECD member states (OECD, 2008).

The graph suggests that a de-centralisation of more than 50% is preferable. This is in line with the rest of the OECD education advice, but it is up to the national governments to decide if they are happy with the position as it is or if changes should be made. The OECD only want to set the educational governance discourse agenda using a 'naming, shaming, framing and faming' strategy (Brøgger, 2016).

As mentioned, Denmark, like other nations, produced political and economic programmes for the modernization of societies and states. The fundamental principles for this were grouped together under the term New Public Management (Hood, 1991), which meant governance – including governance of education – built on:

1. *market thinking*: decentralisation, competition, freedom of choice
   - independent schools had been important since the mid-eighteen hundreds, but since the mid-1980s, gained more importance. The contract is widespread in the de-/re-centralisation of education governance.
2. *product thinking*: outcomes, benchmarks, standards and accountability
   - one aspect of this is the transformation of education from the field of culture towards the market place with the commodification of education and the contract in education (Lugg, Bulkey, Firestone, & Garner, 2002).
3. *customer steering*: free choice

- around the year 1990, governance of schools was decentralised from state towards municipalities and individual schools began to have a parental majority on their school board (Andersen & Thygesen, 2004).

4. *new governance and leadership forms*: low trust, plans and documentation (Moos, 2016a)

- school leadership was made more important with the decentralisation of schools. Also ideas of social technologies were produced (Dean, 1999; Foucault, 2001; Rose, 1999). This is a very large and not-focused category of governing by contracts, leadership technologies, self-leading technologies, evidence-led practices, best practice packages, commodification and output focus in education to mention but a few. Here they will be introduced and used for the analysis of Danish policy development.

The idea of evidence came to Denmark from an OECD report on quality in the Danish education system, the Peter Mortimore review (OECD, 2004b) and the review on Danish education research (OECD, 2004a). The main recommendations in these reports were to strengthen the culture of evaluation – because the institutions and agencies should be held accountable for their outcomes – and to focus more on evidence in education, because aims should be based on more solid generic knowledge. This was the first time evidence was used in connection to education (Moos, Krejsler, Hjort, Laursen, & Braad, 2005).

Parallel to the evidence movement was the establishment of the Danish Clearinghouse for Educational Research (Krejsler, 2017). It made little impact on educational discourses in the beginning, but with the move towards the school-model of the outcomes-based school, it has gained some influence, often in connection to 'what works' phrases or 'best practice' evidence-based programmes or procedures. The idea is that the concept of evidence is being made *the* generic expression for robust and best knowledge all over and in all contexts.

The Current Modernization: The Contract

One very important tool of public governance in Denmark is the social contract (Andersen, 2003; Bovbjerg, Krause-Jensen, Wright, Brorholt, & Moos, 2011). The Quality Report (Undervisningsministeriet, 2007) is one such example of a contract between schools, local education authorities and the Ministry of Education. The format for most of these contracts has been described in national regulations. Contracts also exist within schools, such as annual plans, developed by teacher teams or individual teachers and the school leadership, and individual student plans between students, parents and teachers. Specific contracts have been developed in public governance and organisational leadership and management over the past 30 years. The inspiration for this came from the OECD (OECD, 2016). The contracts are part of public governance, and thus part of the relationship between

governments and organizations and individuals. They are not always legally defined and symmetrical contracts; they are governance contracts and thus special in that the superior level defines the frame of resources, the values and the indicators, while the acting level signs the contract and thereby indicates that it intends to comply with and implement the expectations and indicators.

There are distinctive forms like vertical, top-down contracts between political-administrative masters and local and institutional agents. They encourage actors to compete for contracts both within the public administration and with outside private enterprises or consultancy firms. There are also horizontal contracts within agencies or authorities. The agency is divided into departments who compete with each other and outside actors for contracts.

One kind of contract is written in such detail that there is a need to use social technologies such as international and national comparisons or governance packages (manuals or planning prescriptions). This kind of contract is often described as excessive bureaucracy that takes practitioners away from their core functions, such as teaching, because they must spend time and effort on documenting and testing.

Another kind of contract is softer and thus leaves decisions of implementation to the practitioners as long as they stay within the overall framework. In most cases, a degree of self-evaluation is built into the contract. Such contracts leave decisions to the practice level, where people must manage themselves and their own work. This type of leadership, through values, means that organisations and individuals must take over the values and norms laid out at the superior level (Andersen, 2003). They must do so to such a degree that they make them their own values by leading themselves. For the practitioners, a set of givens exists that includes frameworks, values and indicators as well as a set of choices to be made concerning how effective performance can be reached.

The contract governance is basically a model for separating goal setting from production and measuring of results. For those purposes, there is a need for clear and measurable goals/standards and reliable measurements of results/outcomes.

The neo-liberal model of governance has been characterised by diverse combinations of social technologies in three themes (Dunleavy, Margetts, Bastow, & Tinkler, 2005): *disintegration* of public sectors, *competition* for *contracts* and *incentivisation* (see the description in section about New Public management in the Introduction chapter.)

Contracts can be seen as an opportunity for importing benchmarks, social technologies and procedures into the governance process:

- *Objectives and outcomes*: These are described clearly and detailed by the contractor who often refers to standards and scores in international comparisons like the PISA test (Programme for International Student Assessment), both as an objective and a benchmark. Hereby the social technologies support global standardisation and homogenisation of education (Moos & Wubbels, 2018). The Danish school reform (2013) will be analysed later on.
- *Numbers*: More often than previously, Danish policymakers argue for the need to comply with global or international standards or best practices in education. One

reason for this is that the results of this kind of comparisons are given in *numbers*, and numbers are often seen to be precise, accurate and full of relevant information. Numbers are thought to be crossing the lines between the fluffy and imprecise field of education into the concise field of natural sciences (Nóvoa, 2013). The OECD and the Danish policymakers thereby reduce learning to the acquisition of economically useful skills for employability. In order to be able to compare outcomes, the PISA set of aims and skills was produced. The competencies included are not taught anywhere as a complete set (Labaree 2014).

- *What works:* When describing objectives and outcomes, references are frequently made to 'what works' or 'best practice' evidence-based programmes or procedures. The designation, the concept of evidence is being made *the* generic expression for solid and best knowledge all over and in all contexts. The municipal educational authorities often refer to this and they often purchase education programmes that claim to be evidence based – even if the evidence has not been produced in the Danish education system.
- *Educational programmes:* Individuals, associations and consultancy firms develop and offer best practice packages on an international basis and with the international, generic arguments: The number of schools or individuals who have been successfully served is very high. The fact that they are often coming from cultures and systems so very different from the Danish education system is seldom mentioned.
- *Neo-liberal development:* The construction of numerous contracts is built on neo-liberal market logics. Thus, education is seen as a commodity which is produced by producers, teachers and schools. The services/goods are delivered to consumers (students/parents) once the provider wins the tender competition. The aspect of 'employability' was the only amendment to the Act on school in 2006, and it is also in the School Reform (2013).
- *Incentives*: Many contracts are connected to promises of pecuniary reward or pay off to the provider based on meeting the objectives stipulated in the contract.
- *Privatization:* In most cases the contractor can make the open bidding optional for public and private agencies or institutions. This model has been adopted for governing free basic schools, high schools, university colleges and universities. These institutions have an individual board of governors who are under contract with the ministry or one of its agencies. Private and independent associations or companies can therefore manage education.
- *Consultancies*: National and international, private or philanthropic consultancy firms are increasingly finding their way into educational governance. The Maersk McKinney Møller Foundation donated a large sum of money to the professionalisation of teachers. They were the sole manager of the projects (Moos, 2016b). The consultancies provide individual investigations and advice as well as overall procedures and programmes. Some of the biggest consultancies (like Pearson and Mackinsey) are the cornerstones of the global eduBusiness (see discussion later).

Discourses in Educational Policy and Theory

Discourse here is understood as a way of argumentation and a way of structuring the world. At present, we see two prevailing education discourses in Denmark. One of the two emerged from the welfare state thinking in countries like Denmark post World War II and may be called the "Democratic Bildung Discourse" based on works of theorists like Wolfgang Klafki (2001), John Dewey (Dewey, 1916/2005) and Geert Biesta (Biesta, 2011). We name this understanding of general and comprehensive education Democratic Bildung because the intention is to position children in the world to allow participation in democratic communities and societies in ways that make them competent in understanding the world and other people, and in deliberating with other people (Moos & Wubbels, 2018).

Peter Kemp (Kemp, 2011, p. 6) takes the discussion further by writing that as education is part of civilization, the educational system is responsible for socialising (or forming) children to become well-functioning citizens in the society in which they are being brought up. Educational systems have this dual function: on the one hand, they further the optimal development of a child's competence, and on the other hand, they teach children to be effective, well-functioning citizens. In this way, educational systems have always played a part in societal governance, which is about both building structures and institutions to maintain the dominant culture, and simultaneously socialising citizens who willingly cooperate in this effort. Children also need to be able to think critically and creatively about alternatives to society's norms and dominant discourses.

The other discourse is attached to the neo-liberal, competitive state, and is called the "Outcomes Discourse" (Moos, 2017) because it is first and foremost interested in students' measurable learning outcomes. In this system, education is being constructed along 'management-by-objective' lines: The government draws up detailed aims and measures of the outcomes, while schools, teachers and students need to learn to answer the test questions correctly. Very often, the curriculum that is developed in this situation has a scientific structure. Experts know how to attain their ends, and they describe every step for schools, teachers and students to be followed in detail. In this orientation, there is a focus on 'back to basics' and 'back to skills' because these are what can easily be measured (Blossing et al., 2013). The School Effectiveness movement has for 40 years been a prominent proponent of this trend (Normand, 2016). Students' curiosity, critical sense and participation and experiments find little place here.

The PISA surveys along with other international comparisons like 'Trends In International Mathematics And Science Study' (TIMSS) and 'Progress In International Reading Literacy Study' (PIRLS) have been ground-breaking tools for governing education. The programmes are packages of standards or indicators for learning, measurements for outcomes, and tools for comparing students, schools and countries. This is not unexpected, as a working paper of the OECD shows (Wilkoszewski & Sundby, 2014).

The competitive- and outcomes-oriented discourse and associated practices are subject to more national social technologies than we have ever seen before in the history of Danish education and educational theory. Social technologies can be seen as silent carriers of power. They are made for a purpose – often hidden from the practitioners – and also for specify ways of acting. Therefore, they point to a non-deliberative practice which is steered and managed from the top down (Dean, 1999) and often times 'deliver more than they promise' because some important effects are invisible (Cour, Waldorff, & Højlund, 2017).

The School Reform 2013

Many aspects of the outcomes discourse were developed over time, and a coherent and comprehensive version of that discourse was presented in the School Reform (2013) of the Social Democrat-led government (Moos, 2016b).

The school reform stipulated changes of regulation in the number of lessons in certain subjects, the creation of supporting education and that students should be physically active for 45 min every day (Regeringen, 2012). It is worth mentioning here again that the Government issued an act of legislation, Act 409, that changed the teachers' relations to leaders and authorities fundamentally (Regeringen, 2013). The Act strengthened the powers of school principals to make decisions concerning teachers' working conditions in terms of workload, work area (subject and class grade) and so forth. Up until this act, this process had been negotiated between teachers and representatives of Danish Union of Teacher and school leaders and employers.

Most importantly, however, the act and following regulations prescribed that the Primary and Lower Secondary school should be a 'learning outcomes managed school' with more than 3000 national aims falling under four main categories: learning objectives, competences, skills and knowledge (Undervisningsministeriet, 2015). The number of national tests was increased to 42 of which 14 were compulsory from 2013 onwards.

A social technology which is compulsory for all teachers is the 'student plan'. Each teacher in collaboration with each student must devise a plan with individual academic and social goals for the student, the stage of learning/progression and the actions that need to be taken every year from kindergarten class through to 9th class.

This outcomes aspect of the reform made explicit reference to Danish students' performance in PISA surveys, which policymakers claimed was unsatisfactory. That parameter was used as the benchmark for a school's success. A school is perceived as successful if it ranks amongst the top five nations in the PISA league table. Policymakers and a number of educational academics claimed that too much teaching was based on tradition and normative and philosophical educational ideas that were not evidence-based, which they found unacceptable. Teaching should be based on empirically based knowledge about what works in relation to national aims. That meant it should be evidence-based. This idea initially came from an OECD report

on quality in the Danish educational system, the Peter Mortimore review (OECD, 2004b) and the review on Danish education research (OECD, 2004a). The main recommendations in these reports were to strengthen the culture of evaluation, because the institutions and agencies should be held accountable for their outcomes, and focus more on evidence in education, because aims should be based more on generic solid knowledge.

There have been many critical voices of this aspect, both from academics and parents. The current Social Democrat-led Government that resumed power in 2019 has begun to make some of the aims optional and promised to look thoroughly at the rest. However, one should neither be optimistic nor worried, because the act was passed in parliament through bi-partisan compromise and no changes can be made without the consent of all participating political parties.

Digitalisation and Business

Another important aspect of the reform was the expressed intention to build a shared digital learning platform to further students learning and collaboration between the school and parents.

> A thorough digitalisation of the basic school … shall support students' learning and a flexible planning and carrying through of education independent of time and space. (Denmark, 2015)

Several companies established platforms for schools and municipalities to choose from (e.g. it's learning, meebook, student-intra, aula). In 2019, the Ministry chose the collaborative communication platform Aula as the standard. The learning parts of the platform were naturally built on the national aims.

This development is in line with the emergence of *eduBusiness* (Williamson, 2017). This discourse and practice are built on two foundations. The first one is the commodification of education that brings education into the centre of the global marketplace (Ball, 2004, 2012), and the second one is the rather new interest in education that is being taken by international and national private agencies such as large consultancies and private foundations. Here, the players are interested in profit as well as the influence they can gain from data and on the education market.

Many consultancies and enterprises construct learning programmes for subject- or social-learning for all subjects offered by a school. Some of them are known evidence-based programmes like PALS (in English: Positive Behavioral Interventions and Supports (PBIS)) with evidence from predominantly American schools (Socialstyrelsen, 2016). These and similar programmes are administered from the National Board of Social Services to municipalities which means that the schools are strongly adviced to use them. This scenario could raise at least two issues: Is American evidence relevant to Danish schools? And is a programme that manages teachers' practices in detail actually going to support school development and teacher professionalism?

Global education programmes and learning platforms are most often constructed to use and harvest big data. The use of algorithms to produce mega/big databases from globally used tests and learning programmes (Williamson, 2016) helps the companies to claim that their programmes are evidence based. Thereby they support downgrading or neglecting the importance of national and local cultures.

Consultancy firms, agencies and governments use digital solutions for a multitude of purposes. Some of them are to gain 'algorithmic governance' of citizens' everyday lives (Williamson, 2017) in combining thinking, institutions, technologies and activities that can be used to monitor, control, form and regulate human activity and behaviour (Foucault, 2001).

An emerging discourse about platforms says that the portal should not only contain learning material, assignments and tests, but it should also:

> ensure access for parents, teachers and students to individual student profiles and daily/weekly/yearly class plans, assigned activities, learning processes, assignments, results from national tests and learning objectives (Undervisningsministeriet, 2014, p. 2)

The Aula platform is being seen as a complete universe or environment that encompasses all aspects of school life of the students and teachers from learning to well-being and forgotten outdoor activities (Cone, 2020 (forthcoming)). This brings standardizing, monitoring and controlling of actors to a new, higher level because standards and practices are being issued on a general, national level.

Another step in the eduBusiness development has emerged during 2019 when municipalities began to collaborate with Google Suite for Education (Council, 2019). Google has negotiated low prices for different laptop models, where the programming and storing facilities are located in the Google Cloud. The cloud facilities are being given for free to the municipality. Thus, for example, they can give free laptops to all students in the school district of Aarhus. Google does not earn anything, money wise, but gets a lot of big data on students and learning in the district. The municipal authorities have not yet found any problems with this arrangement (Interview with Lucas Lundbye Cone in Jyllands Posten, November 8th, 2019).

Aarhus is the second largest city in Denmark, and more municipalities are following this arrangement. Worth noticing with this set up is how Google is following and building on the OECD and Danish Reform's focus on the individualistic student learning that neglects a focus on teaching in communities. So maybe we should change the label from eduBusiness to *learning*Business.

Discussion

In this chapter we have illustrated how Danish cultural history, policies and educational governance have for centuries been connected to the development of other Nordic countries, but for the past 40–50 years increasingly been influenced by transnational trends. Parallel Nordic efforts to build welfare states and thus Democratic Education are being modified by transnational tendencies towards more

neoliberal inspired governance as we see with contract governance. Aspects of the contract are management by objective and management by outcomes, that entail more focus on national objectives and outcomes and thereby What Works and evidence technologies.

Educational governance was thus directed more towards neoliberal models of management. At the same time education itself was shaped towards relying more on digital technologies.

The traditional chain of governance is being transformed into policy networks. Professional actors, policymakers and administrators increasingly welcome global and private enterprises to get involved in parts of the education discourses, practices, materials and finances. One general trend in this development is to move educational discussions and decisions from local and national levels to transnational and global levels as the constructor and builders of digital and social technologies are global for-profit enterprises. The focus on evidence based and What Works technologies has inherent trends towards homogenization of education across cultures and towards moving focus from educational philosophy towards educational governance. This produces considerable challenges for maintaining a national directed school policy and threatens the room for professional discretion.

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Chapter 3
Finland – The Late-Comer That Became the Envy of Its Nordic School Competitors

Risto Rinne

Abstract Finland has lived a centuries long history under the rule of Sweden. In 1809 the country was transferred from the rule of Sweden to become a grand duchy of Russian empire. In 1917 Finland became an independent nation between the west and the east. Although Finland is currently strongly devoted to the west, this has not always been the case, and the country has to take into account carefully its historical, cultural, geopolitical and economic roots as well as the long Eastern border of 1340 kilometers with Russia.

Finland has several political, economic, cultural and educational features that are similar to the other four Nordic countries. Defining examples are the so-called Nordic welfare model linked to the Keynesian economic model, the participation and equality of opportunities as well as the principle of equality of education to everyone independently of her or his social, ethnic, gender and regional origin.

But Finland is also the late-comer in the Nordic family. It became industrialized and urbanized much later than its Nordic neighbors and remained an agrarian country until rather recently. In summary, Finland has changed quite late but also quite fast. In recent years Finland has become one of the best educational achievers among OECD countries as well as also among Nordic counties. One of the reasons may be Finnish educational politics. So, what happened?

In this chapter I describe and research in historical and comparative terms the social and educational paths and developments in Finland, their ups and downs and why Finland and its history looks like it looks.

Keywords History of education in Finland · Equality in education · Structural change · Educational expansion

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Finland, a Late-Comer in Terms of Reconstruction, Structural Change and Modernization[1]

Finland is a country of five and a half million inhabitants in the northernmost periphery of Europe, with Russia as its neighbor. Its social, cultural and geopolitical history was strongly linked to the rule of the Swedish Kingdom (until 1809), and then to Russian Tsar Empire (until 1917) as a Grand Duchy, or autonomous province with its own legislation. As a consequence, Finland's traditions of governance have taken many models and traits from the old centralized and bureaucratic systems of its two neighboring countries. (Rinne, 2004)

During most of the years as an independent country Finland has based its cultural and political position upon Nordic neutrality between the power blocs of the east and the west. Because of its good political and commercial relations with the Soviet Union it has, now and then, been accused of "Finlandization" by Western commentators. Finland was slow to integrate into the OECD and it was not until the dissolution of the Soviet Union in the 1990s that the country sought membership of the European Union and rapidly strengthened its ties with Western Europe. Up until the 1990s Finnish welfare policies were clearly based on the Nordic or social-democratic model, with an emphasis on universal comprehensive social security free of charge, strong state control, significant income transfers, full employment and a high level of equality. Educational policy has been considered one of the most influential spearheads in the removal of all types of social inequality.

Finnish society was a late-comer in terms of the modernization of the occupational structure. Finland belongs to the group of European nations that have only very recently left behind their agrarian society and lifestyle. The process of industrialization of working population and urbanization was sluggish until the Second World War, compared with Central Europe and the other Nordic countries. In 1945, 70% of the Finnish population still lived in rural areas, and almost 60% was employed in agriculture and forestry.

Following the great migration in Finland in the 1960s, half of the population lived in cities and one third (32%) was employed in industry and construction by 1970 (cf. e.g., Alapuro, Liikanen, Smeds, & Stenius, 1987).

Figure 3.1 contrasts the late but rapid change in the Finnish occupational structure with the changes in other Nordic countries. The Fig. 3.1 shows when the agrarian labor force in four Nordic countries decreased from 50 to 15%. Whereas the demise of agrarian labor took place over 80 years in Norway, and over 50 years in Sweden, it happened in Finland within only 20 years. No wonder, then, that the construction of the welfare state began a decade later than in the other Nordic countries.

[1] This section of the chapter is drawing heavily on the article "Simola, H. & Rinne, R. (2011) Education Politics and Contingency: Belief, status and trust behind the Finnish PISA miracle. In M. A. Pereyra, H.-G. Kotthoff & R. Cowen (Eds.) PISA under Examination: Changing knowledge, changing tests, and changing schools. Rotterdam: Sense Publisher, 225–244.

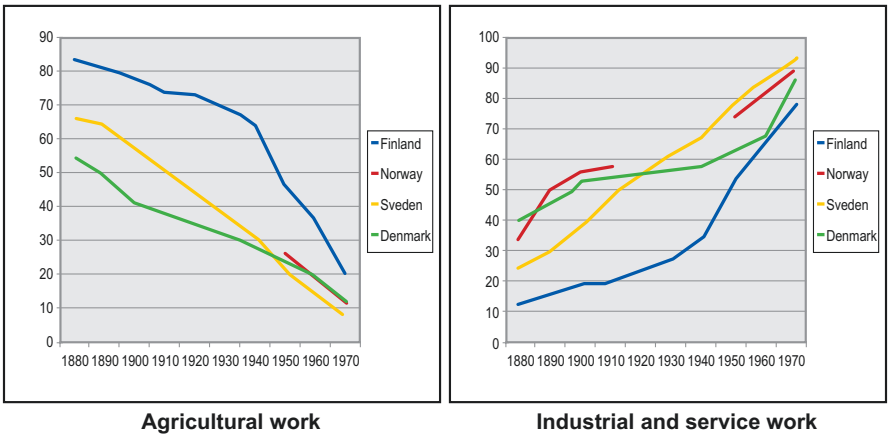

Fig. 3.1 Change of working population in agricultural work and industrial and service work in Nordic countries 1880–1970. (Source: Pöntinen, 1983)
The change in Norway and Denmark is throughout the figure very similar (from 1880 to 1910 exactly the same)

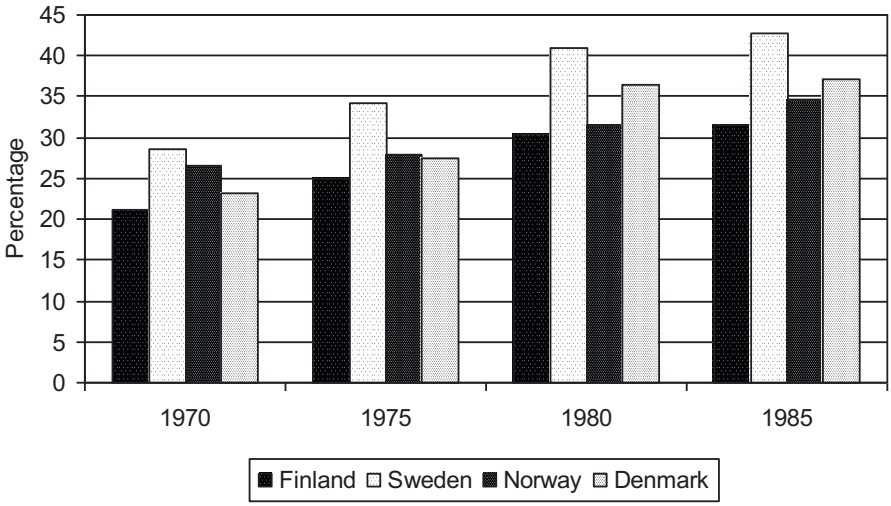

Fig. 3.2 Public employment in Nordic countries 1963–1987. (Source: Kosonen, 1998, 152)

Therefore, the high faith in schooling might well be an outgrowth from Finland's late expansion, the late modernization of the occupational structure and the late construction of the welfare state. These social changes happened gradually in most countries rather than suddenly. This rare conjunction might well have created a strong collective experience of causality between progress in formal education and simultaneous social advancement. (Rinne & Simola, 2005)

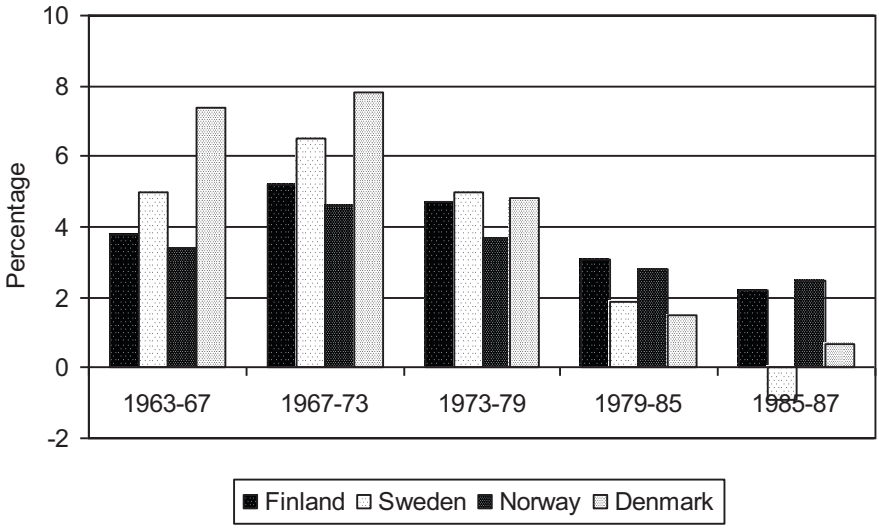

Fig. 3.3 Growth of the work force of the public sector in the Nordic countries 1963–1987. (Source: Alestalo, 2010)

Figures 3.2 and 3.3 give a compressed view of the different lengths and timing of the changes of growth of public employment and growth the work force of the public sector in the Nordic countries from 1960s to 1980s.

Expansion of the welfare state after WW2 meant an upheaval in the labor markets of the Nordic countries. Public-sector employment in Finland grew from 20 to over 30% between 1970 and 1985. Typical of the Finnish model was that the growth began later but also continued longer than in the other Nordic countries (Figs. 3.2 and 3.3).

Late But Rapid Booming… in Finnish Education as Well

There are astonishingly few comparative studies that include Finnish education, even related to the other Nordic countries. Nevertheless, there is a strong national consensus that, in international comparison, Finns appreciate education, or schooling to be more precise, very much. Therefore, the faith in schooling as an agent for social equality and as a cornerstone of continuity and consensus in Finnish education policy has remained stronger than in many other Western countries.

At the individual level, the main objective of Finnish education policy is to offer all citizens equal opportunity to receive education, regardless of age, domicile, financial situation, gender or mother tongue. At the national level, a major objective of Finnish education policy is to achieve as high a level of education and competence as possible for the whole population.

The now defunct Finnish folk school system was established in 1866 and the act concerning universal compulsory education came into force in 1921. Compulsory education was completed once the child had successfully completed the folk school or a corresponding syllabus in some other way. The folk school offered 6 years of education. Upon completion of folk school, pupils could continue at civic school, which offered 2- or 3-years of additional education. After civic school, it was possible to move up to vocational school, for example. From the fourth form onwards of folk school, it was also possible to apply to a lower secondary school, which provided eligibility for general upper secondary school. The lower secondary school of 5 years, combined with the upper secondary school of 3 years, collectively formed a secondary school of 8 years. (Aro, Järvinen, Rinne, Julkunen, & Lunabba, 2010).

Finland was among the last countries in Europe to establish compulsory education. Six years of elementary education was made compulsory by law only in 1921, simultaneously with Thailand, whereas legislation mandating compulsory school was enacted in Denmark in 1814, in Sweden in 1842 and in Norway in 1848. Moreover, expansion of Finnish primary school expansion was slow even after enactment of the law, and compulsory education was not fully functional and did not cover all children across the country and among all social groups until just before WW2 (Rinne, 1984; Rinne & Salmi, 1998, 27; Ramirez & Boli-Bennett 1982).

The school system and, subsequently, compulsory education were reformed in the 1970s: the previous folk school, civic school and lower secondary school were replaced by 9 years of comprehensive school offering general basic education. Simultaneously, upper secondary school was separated from lower secondary school to form a distinct institution of its own. The transition into comprehensive school was carried out gradually between 1972 and 1978. The aim was to raise the level of education of the population and increase equality in education. It was argued that learning and skills potentials were wasted in a system which separated pupils into different education paths. The political support for the comprehensive school system came from the left-wing parties and the centre. In terms of basic education, the most significant recent change is the abolishment of the division of comprehensive school into lower and upper stages. Every child has a right to attend the nearest school to his place of residence or apply to a school of his choice (Aro et al., 2010).

The history of general upper secondary school dates back to the seventeenth century, when Finland was under Swedish rule. The first “gymnasium and school regulations” were enacted in 1843, when Finland was an autonomous part of Russia. General upper secondary education was part of grammar schools until the comprehensive school reform of the 1970s, when it became a separate form of education. Virtually all students who complete the upper secondary school syllabus will also take the national matriculation examination. The matriculation examination has its origins in the university entrance examination of 1852. In 1874 a uniform statute governing the matriculation examination was issued, ordering that the written matriculation examination tests be held at educational institutions providing education leading to university studies.

Development of special needs education in Finnish folk schools within the parallel school system prior to the introduction of the uniform comprehensive school system can be divided into four periods. Initially, special needs education focused on arranging instruction for pupils with sensory disabilities. In the post-war period the field of vocational rehabilitation was being developed. From the early 1970s, the philosophy of social integration came strongly to the fore in the education of pupils in need of special support. In the context of special needs education, integration means the aim to implement special needs education, as far as possible, integrated into mainstream educational services. The instruction of children with the most severe intellectual disabilities, which had long been organised by the social authorities, was transferred to be provided by comprehensive schools as from 1997. (Aro et al., 2010)

The number of pupils transferred to special needs education has been growing for more than a decade. During the 2007–2008 academic year 126,300 pupils (22%) received part-time special needs teaching. Slightly more that half of the pupils transferred to special needs education are fully or partially integrated into groups attending general education while just under one-half receive teaching in special needs groups in comprehensive schools or in special schools (Fig. 3.4).

The extensive special needs education system within the comprehensive school is one of the key reasons that explains why the dropout rate in Finnish comprehensive school has been minimal since the 1960s (Simola, Rinne, & Kivirauma, 2002a, b). For instance, in the school year 2006/2007, only 0.23% of the comprehensive school leavers, 152 pupils, did not succeed in obtaining the basic education school leaving certificate. (Myllyniemi, 2008; Rinne & Järvinen, 2010; 2011) (Fig. 3.5)

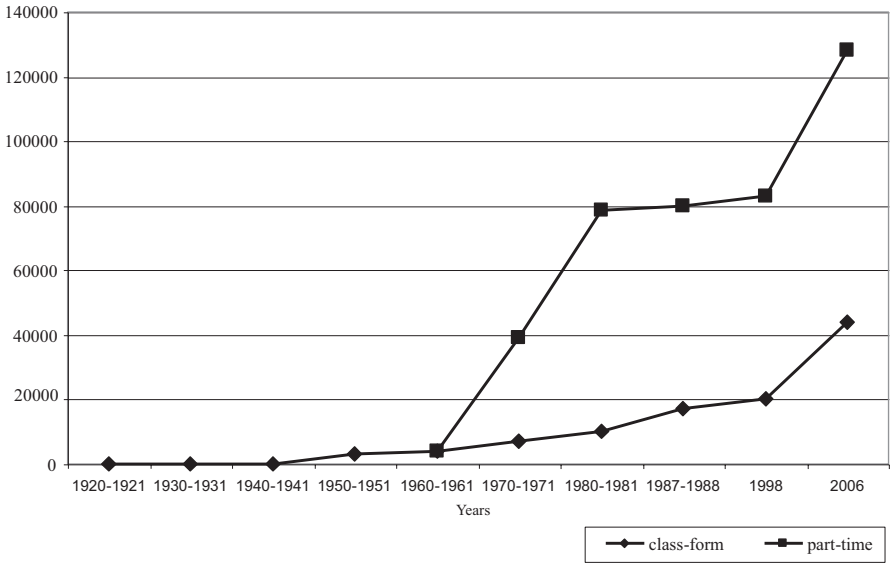

Fig. 3.4 The numbers of pupils who participated in special needs education in Finland in the years 1920–2006. (Source: Statistics Finland)

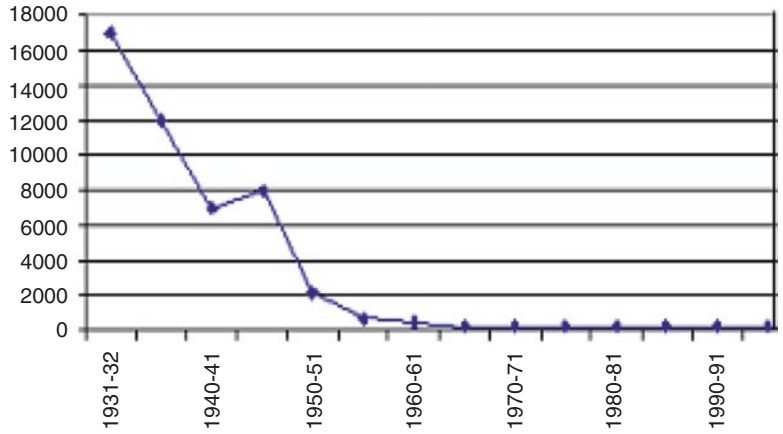

Fig. 3.5 Those neglecting their compulsory education in Finland during the years 1931–1995 (Rinne 2001; Kivirauma, 1989, 28; Statistics Finland, KO 1996: 2)

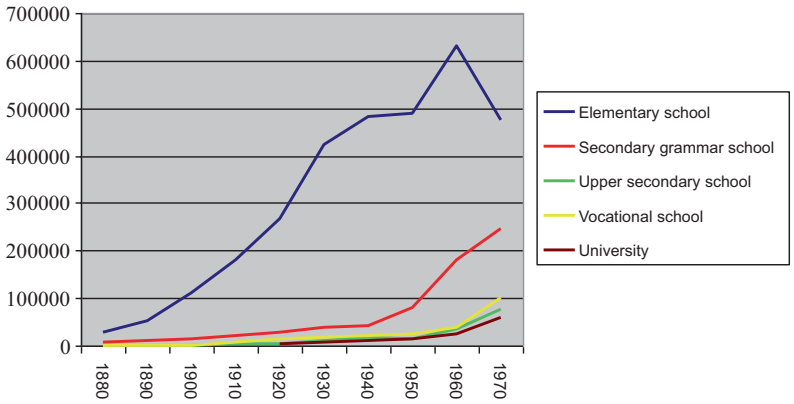

Fig. 3.6 The expansion of schooling in Finland 1880–1970 (number of pupils by year). (Source: Kivinen, 1988; Kivinen, Rinne, & Ahola, 1989; Kerr, 2012)

All this is indicative of the fact that the Finnish success story in education is a very recent event in historical terms. Whereas almost 70% of the younger generation nowadays aspire to a higher-education degree, about the same proportion of their grandparents obtained the full elementary-school certificate. Figure 3.6 clearly illustrates the late blooming of Finnish education (Fig. 3.6).

Because of the late formation of the educational system, educational gaps between older and younger generations are among the widest in Europe (Simola & Rinne, 2011). Nonetheless, this serves as a powerful indicator of the symbolic power of traditional social democratic-agrarian *equality* in Finnish educational discourse.

The late development of the educational system at the secondary level in Finland and the previously low percentage of participation in secondary education compared to the other Nordic countries are clearly visible. In 2001 only about half of 55–65-year-olds had a certificate of secondary education (51%) compared to 65–72% in the other Nordic countries. The differences were still remarkable – well over 10% in 2005 – compared to the other Nordic countries. It may be that this rare conjunction created a strong collective experience of causality between progress in formal education and simultaneous social advancement.

The other strong evidence and fact behind the late but rapid booming success of Finnish education may be anchored in the broad and intensive use of soft technology of governance coupled with extensive use of school autonomy, which allowed everyday life in schooling and education practice to be carried out by highly educated academic teachers. The evidence of Finnish success in education is presented in various comparative research and measurements by international organizations like the OECD's PISA surveys, where Finland has remained consistently in the top.

The same is true of the modernization of the occupational structure in a country that was until very recently agrarian. The comprehensive school reform in the 1970s was thus followed through by cooperation of the Left and the Agrarian Party that still nowadays form part of the rare trident Party constellation of Finnish policy making: the Right (National Coalition Party), the Left (Social Democrat Party) and the Agrarian (Centre Party). Finnish culture may therefore emphasize more than in other Western countries a traditional understanding of egalitarianism.

We may conclude that the high faith in schooling resulted from the contingent conjunction of its late expansion, the late modernization of the occupational structure and the late construction of the welfare state. The eminent Finnish sociologist of education Ari Antikainen (2008) referred to the strong collective experience of causality between progress in formal education and simultaneous social advancement when he wrote that the overall rise in student enrolment brought increasing numbers of students from the lower classes, even though their proportion of the total number remained low. This might be "a shared experience among the common people", who also have their own experience of education as a real resource in the rapid transformation of Finnish society, not least as a channel of migration from rural areas and agriculture to the cities in the period of the 'Great Migration', 1960–1975.

The Steps Closer to the Western World and Capitalist System

Finland took its first steps towards the West already in 1969, when it became member of the OECD. After the fall of the Berlin wall (1989), the "velvet revolution" in Eastern Europe and the collapse of the Soviet Union (1991), the march towards a capitalist economy and an ideology promoting neo-liberal values have proceeded all over Europe and also Finland. The subject matter and aims of education have also changed. "Management by objectives, accountability, and evaluation [have] become

the new dogma for educational policy implementation in Scandinavia", as Arild Tjeldvoll (1998, 15) puts it. (Rinne, 2004).

As a member of the Nordic family, Finland has also invested heavily and systematically in education. The level has risen rapidly, especially in the latter half of the twentieth century, and is nowadays among the highest in the OECD countries. Only a tenth of those born in Finland before the country became independent in 1917 completed more than basic education, whereas as much as half of the baby-boom generation born after the Second World War has acquired at least a vocational qualification. Of those born in the early 1960s only a fifth entered working life with no more than the basic 9-year schooling behind them, and among those born in the late 1970s the proportion has dropped to less than one in ten (Antikainen, Rinne, & Koski, 2000; Kivinen & Rinne, 1998; OECD, 1996, 1998, 2000; Pöntinen, 1990; Rinne, 2004).

Finland's position between east and west framed most of the international cooperation of the country until the fall of the Berlin Wall and the collapse of communism in Europe in the 1990s. Openness of influence to the OECD and the west came late, and openness to neoliberal system redesign even later (Grek et al., 2009).

In the 1990s the political context in Finland was rapidly changing. The great recession at the beginning of the 1990s had severe consequences for Finland and weakened the defense of comprehensive provision of education. The conservative governments allied with the employers in promoting the market-liberal values of effectiveness, marketization, parental choice and management by results. More weight was also given to international comparisons and cooperation as well as to the recommendations of the supranational organizations. The collective narrative of education as a national enterprise was weakened during the 1990s. The hard years of the recession strengthened the Nordic egalitarian ethos again, and Finland became a 'model pupil' in applying neoliberal innovations in education, but through technical and incremental policy rather than through making strong neoliberal declarations. Curiously enough, no political actors were willing to question the ethics of equality in education discourse (Kallo & Rinne, 2006; Patomäki, 2007; Rinne, Kivirauma, & Simola, 2002; Simola et al., 2002a, 2002b).

Finland actively participated in the PISA project since its beginning in 1995 and has been a model pupil of the OECD while also being active in the work of PUMA, the Public Management Committee of the OECD. Finland adopted the ideas of the New Public Management Committee, especially at the municipal level (Haveri, 2002, 5, 6 and 17). There were a number of influential conduits of OECD influence in the first Conservative Party-led coalition government in the 1990s. Other important networks involved permanent officials specializing in education, who spent 3–5 years in Finland's Permanent Delegation to the OECD and UNESCO in Paris and who became important brokers of OECD ideas. Finland was represented on the Centre for Educational Research and Innovation (CERI) Governing Board and also on the Education Committee of the OECD. The exceptionally receptive stance of the Finnish education policy elite towards the OECD has been noted by various commentators. Interviewees in Niukko's (2006a, 2006b) study and in our own

research refer to mutual respect especially following the recent attention given to Finland after its national success in PISA. (Grek et al., 2009)

Finland, as indicated above, is the OECD's 'model pupil' (Rinne, Kallo, & Hokka, 2004). This characterization is contained in the OECD's own account of Finland (Grek et al., 2009):

> Finland has a record of heeding the advice of past OECD education reviews. The review seems likely to continue that pattern, helping to shape the future of a dynamic education sector. (OECD, 2003; cited in Rinne et al., 2004)

The former longstanding head and a kind of founding father of the education office of OECD, George Papadopoulos (Papadopoulos, 2004, 2006 cited in Niukko, 2006b, 14) refers to the same phenomenon:

> I have the impression that Finland has an exaggerated perception of the role of what experts say. (…) Some countries are very hostile to foreign criticism. I think Finland, from what I guess, is not hostile but would like to get assistance.

From 1987 Prime Minister Harri Holkeri's right-left coalition cabinet aimed to bring about an essential change in politics in what has been called the Third Republic in Finland (see, e. g., Alasuutari, 1996, 263; Simola, 2004). For the first time since World War II, the conservative National Coalition Party now held the post of Prime Minister and its two decades in opposition were over. As far as education was concerned, this marked the end of the deal between the Center and Social Democratic parties.

As a result of globalization, and increased influence of supranational organizations in particular, nation-states have come under increasing pressure to follow neoliberal orthodoxy in educational policy and planning. By examining the policy documents and practices of the World Bank, the OECD and the European Union, we see the heavy influence of free-market neo-liberalism in thinking about educational reforms and policymaking, and almost no nation state can avoid this profound influence.[2]

It is, however, important to remember that even if the same policy discourse does enter the policy systems of different countries, policy implementation is a highly complicated and fortuitous affair. National policymaking is inevitably always a process of bricolage; a matter of borrowing and copying bits and pieces of ideas amending locally tried approaches, theories, research, trends and fashions and flailing around for anything that might work. Many policies are ramshackle, compromise, hit and miss affairs which are reworked and tinkered with and inflected through complex processes of influence and ultimately recreation in national or local context of practice (e.g. Ball, 1994, 2001).

[2] Many studies related to supra-national/global influences on national educational policies have recently been carried out within CELE, university of Turku (e.g. Kallo, 2009; Kallo & Rinne, 2006; Niukko, 2006a, 2006b; Rinne, 1999; Rinne, 2001; Rinne, Kivirauma, & Hirvenoja, 2001a, 2001b; Rinne & Ozga, 2011; Seppänen, 2006; Simola, Rinne, & Kivirauma, 1999), but in the framework of this article it is not possible to concentrate on those in detail.

The OECD differs from the other supranational organizations, in that its influence over the educational policy of the member states is based on information management. The OECD cannot make any legally binding decisions or issued any obligatory education policy recommendations. On the other hand, the OECD has become established as a kind of 'eminence grise' of the educational policy of industrialized countries (Rinne et al., 2004; Kallo, 2009.)

The OECD has been quite diligent in making and publishing country reviews, as well as thematic reviews concerning educational issues. In addition to organizing numerous meetings and consultations on educational politics, its impressive annual flagship publication "Education at a Glance", in which countries are ranked on the basis of various educational indicators, has had a great influence in steering the direction of national education politics.

Finland has repeatedly succeeded well with top positions in OECD's PISA evaluations of 15-year-old school pupil's scholastic performance. In 2000, 2003, 2006, and 2009 Finland has been at the very top of the ranking with a slippage in 2012 and 2015 (Seppänen, Rinne, Kauko, & Kosunen, 2019). In addition, although the differences in performance of the students representing different sexes, regional areas and social backgrounds were also clear in Finland, these differences were among the smallest. (Rinne & Järvinen, 2010; 2011). In the latest PISA-survey from 2019 the Finnish results were still rather high, but they had clearly dropped down from the most top places. Especially the differences of results between girls and boys had grown quite bit in Finland in favor of girls.

According to Aho, Pitkänen and Sahlberg (2006, 126–133), however, there are six possible factors in the Finnish education system and society that may contribute to these achievements. The factors include the following: (1) comprehensive school is same for all, (2) teachers are highly educated and teacher education stands out in international comparison for its depth and scope, (3) sustainable political and educational leadership, (4) recognition and appreciation of existing innovations (i.e. a culture of innovation in the education system), (5) focusing on deep learning instead of testing (the only standardized test in Finnish education system is the matriculation examination in the end of the upper secondary school), and (6) a culture of trust (i.e. the Ministry of Education and Culture and the National Board of Education believe that teachers together with principals, parents, and their communities know how to provide the best possible education for their children and youth), which is enabled by an environment that is built upon good governance and close-to-zero corruption. However, it is important to note that Finnish children do not reach the PISA kind of top rankings in all the other comparative research. For example, in 2004 in an international comparative study by the World Health Organization, it came to light that only a small minority of Finnish children and adolescent truly enjoy being at school. (Rinne & Järvinen, 2010; 2011.)

Free school choice policy, which was introduced to comprehensive school system in the 1990s, has sparked a lot of public debate in Finland. According to this supranational policy, parents can choose the school that their child attends and schools can partially select their pupils. Free school choice policy is perceiced to contradict the goals of equal educational opportunity and equality also mentioned in

the law (Rinne & Tikkanen, 2011; Vanttaja & Rinne, 2008, 26). According to Seppänen (2006, 4) the features of the education markets, where school choice policy is conceptualized to take place, in the Finnish cities are similar to those in other countries. Selection of pupils by their ability is vastly used, and on average, every other family considers applying or applies to another school than the neighborhood school. The popularity of the schools differs and the application flows between schools are mainly directed towards the city centers. Simultaneously, comprehensive schools have started to specialize and create individual school profiles. In the last couple of years, the Ministry of Education and Culture has become conscious of the potential negative effects of the free school choice policy, and the development plan for education and research 2003–2008 states that one of the goals is to strengthen the neighborhood school principle and prevent inequality of schools (Vanttaja & Rinne, 2008, 26–27). In addition to the free school choice policy, another distinctive feature in the new Basic Education Act is the role of evaluation. The law obliges education providers to evaluate their education and its effectiveness. Education has to be evaluated also by external evaluators. (Vanttaja & Rinne, 2008, 27)

Another distinct trend in Finnish basic education in the last two decades has been the constantly increasing number of immigrant pupils. In 1999, 4% of comprehensive school pupils had an immigrant background, which still places Finland as a country with few immigrants by international standards. Immigrants are not evenly distributed in Finland or in Finnish cities, and thereby the amount of immigrant pupils varies significantly between cities and schools. (Tuittu, Klemelä, Rinne, & Räsänen, 2011, 13, 21.) Those immigrant pupils, whose knowledge of Finnish (or Swedish) language is not yet sufficient to study in a Finnish-speaking class, attend to instruction preparing for basic education. For children between ages 6–10 the minimum of preparatory instruction is 900 h, and for children older than 10 years the minimum is 1000 h. Pupils can transfer to mainstream education before the minimum is reached, if he/she can follow instruction in Finnish (National Board of Education, 2009). There is also a variety of different support measures for immigrant pupils after they have transferred to a Finnish-speaking class. According to the principles of the Ministry of Education, it will foster good relations between different ethnic groups when the right of immigrants to their own language and culture as well as their equal treatment regardless of the reasons for their immigration are respected. The main goal is to take into account the needs of immigrants within the regular framework of services and systems and avoid, whenever possible, to resort to extraordinary and tailored measures. (Ministry of Education and Culture, 2011)

We may emphasize that since the early 1990s there has been an extraordinary strong contradiction between *convergence* and *path dependence* in Finnish education policy. After the decades of *Finlandization* there was an extremely strong pursuit towards convergence: to be accepted as a genuine Western advanced liberal society. On the other hand, Finland was so strong path dependence of social and educational decisions based on traditional social democratic and agrarian values of equality.

Finland's position between east and west framed most of the international cooperation of the country until the fall of the Berlin Wall and the collapse of 'Real Socialism' in Europe in the 1990s. Openness of influence to the OECD and the West came late, and openness to neoliberal system redesign even later. In the 1990s the political context in Finland was rapidly changing. The conservative governments allied with the employers in promoting the market-liberal values of effectiveness, marketisation, parental choice and management by results. More weight was also given to the international comparisons and cooperation as well as to the recommendations of the supranational organizations. The collective narrative of education as a national enterprise and comprehensive provision was weakened during the 1990s. According to the true declaration of the era, the "Proposal of the NBE for a structural programme of education" (NBE, 1992), the development of the Finnish comprehensive school would be characterized by concepts such as 'decentralized and consumer-based accountability', 'result-based public funding' and 'self-responsible individual learning' (Simola, Varjo, & Rinne, 2011).

To mark the beginning of the new era after the nearly 50 years of the 'Red-Soil' (*punamulta) governance and* hegemony, conservative Prime Minister Holkeri (National Coalition Party) gave an epoch-making address in 1987 in which he redefined the very central concept of Finnish education policy so far. His message was that people were different in terms of capacity, and equality meant the right of every pupil to receive education that corresponded to his/her prerequisites and expectations rather than the delivery of universal *Bildung* for everybody regardless of his/her socio-cultural background. It is clear that this new definition referred to *equity* rather than to *equality*.

Some top level politicians interviewees refer to the OECD as 'the instrument, catalyst and certain framework for comparison' for Finnish education policy (Niukko, 2006a, 2006b, 130) and admit that *Education at a Glance* and rankings in PISA do have clear effects to policy, especially if you are ranked below average' (ibid., 141). In Niukko's (2006a, 2006b) study, the decision-makers and civil servants saw the most important function of the OECD in its role 'as a neutral tool of the national education policy'. Some of them criticized OECD as 'the judge', and others characterized it as 'the doctor' or 'the psychiatrist'. (Grek et al., 2009, 15–16)

From the path dependence side, however, Finland was strongly bound to traditional social democratic and agrarian values of equality that make the call of neoliberalism extremely contradictory.

As a symptom of the symbolic power of traditional social democratic-agrarian *equality* in Finnish educational discourse, there is no analogous concept for *equity*, even though it would be easy to find one (*oikeus, oikeudenmukaisuus*). The concept of equality is used in two contrasting ways. These two conceptions were connected in a curious formulation in a major document published by the Educational Evaluation Council:

> The economic and social welfare of Finnish society is based on an egalitarian public system of schooling. Its mission is to guarantee for every citizen *both* educational opportunities of good quality regardless of his/her sex, dwelling place, age, mother tongue and economic

position *and* the right to tuition accordant with his/her capabilities and special needs and his/her self-development (emphasis added).

The implementation of the new understanding of the sacred notion of equality appeared to be a much more complicated mission than Prime Minister Holkeri and his party colleagues could ever assume.

Some Conclusions and a Widening of the Perspective: Finland – Finding Its Own Way in Between and Not Only at the Top After All?

Finland is riding along on its fame in the OECD international educational ranking. In the 2006 PISA survey Finland achieved a first place in natural sciences as well as a second place in reading and mathematics. In 2000 and 2003 Finland was also ranked among the best, awarded a first place in reading in both reviews, and thus the national success story seems steady enough. In addition, in the Finnish comprehensive school the interdependent differences in achievement are comparatively small in international comparison.

Further, Finnish young people are more highly educated compared to youths in many other OECD countries, and young people's exclusion from both education and working life is less of a problem in Finland than in many other countries belonging to the EU. (European Commission, 2005; OECD, 2008).

On the other hand, success at school, choice of educational careers and climbing up the educational ladder are still closely connected with one's parents' social status and level of education, even in the Finland of the twenty-first century (Järvinen, 2003; Kivinen, Hedman, & Kaipainen, 2007). Even though the significance of the home as the definer of school success has weakened during recent decades, the clear discrepancies have not disappeared anywhere. Due to the recession in the beginning of the 1990s and the simultaneous new course taken in educational policy, clear internal differentiation within the school establishment as well as the genesis of educational routes for the haves and have-nots can be seen. For instance, in relation to choices concerning upper secondary education, choosing general school is more common among children with highly educated parents than among children of less educated parents and it is even eightfold more probable for the offspring from a highly educated family to end up in a university than for a child from a family with lower education (Kivinen et al., 2007).

It is also of importance to note that Finnish children do not reach the PISA-kind of top rankings in all comparative surveys and research. For example, in an international comparative study by WHO, it came to light that only a small minority (5%) of Finnish children and young people truly enjoy being at school. When comparing 15-year olds regarding this issue, Finnish young people brought up the rear.

In a comparative study published by UNICEF regarding the overall well-being of children and young people, Finland was ranked as third out of 15 countries in 2005.

Only the Netherlands and Sweden were ahead of Finland in this study. However, even in this comparison, Finland received low scores when comparing the "family- and friend–relations" of children (12th.) and "experience of subjective well-being" of children (9th). Regarding those issues, Finland's ranking was clearly below average. (Kangas, 2008.)

In Finland, there has recently been a lot of discussion related to the polarization of young people into those who are coping well in many areas of life and those who are in a serious risk of social exclusion. Fear has been expressed that these groups of young people are becoming increasingly separated from each other (Autio, Eräranta, & Myllyniemi, 2008). Based on available official statistics as well as recent survey studies, one can argue that, on a general level, this polarization hypothesis holds true. It seems that the proportion of young people who are at risk of social exclusion has increased during the past 15 years in Finland. Firstly, exclusion from the family sphere has become more common among children and young people; the proportion of children and young people placed outside their home or in custody has constantly increased during the years 1991–2006. Also, the proportion of young people with low income as well as young people with mental health problems has increased during the same period. In addition, youth unemployment rates are higher in Finland than in other countries belonging to the EU on average. (e.g. Järvinen & Vanttaja, 2005; Myllyniemi, 2008; Rinne & Järvinen, 2010).

There are several differences related to the well-being of boys and girls in Finland. Loneliness, for instance, is more common among young males than among young females, as is a negative attitude towards schooling. Mental health problems, in turn, are more common among girls than boys. One must note, however, that although the risk of becoming socially excluded has somewhat increased during the past 10–15 years, the great majority of Finnish young people are satisfied with their life as a whole, and with their health and social relations in particular. In a nationally representative study, when asked what school grade (using the Finnish scale of 4–10) young people aged 15–29 – would give to their overall life satisfaction, 92% of them responded at least 8/10. In all, it seems that the life situation of the majority of Finnish young people is good or even extremely good, whereas a minority of young people have serious life-management problems and severe difficulties in many areas of life. In this respect the above-mentioned polarization hypothesis holds true. (Myllyniemi, 2008.)

This small, although growing minority of Finnish children and youths seems to be at risk of wider social exclusion and this social truth has strong influences on both everyday life at school and the whole educational system. The idea of raising the educational level of the entire population and establishing educational equality has been at the center of Finnish education policy since World War II. For over a century, the country has struggled to guarantee the offspring of all families an optimal level of education despite their economic, social, regional or educational background or status, and regardless of gender or ethnic origin. In Finland, there has been a strong faith in national solidarity which means that the weakest have also been taken care of.

During almost the past two decades, however, there have been clear signs of change in the attitude climate of education. The goals and activities of education have more radically than before been based on ever hardening competition. There has been a tendency to regard education more and more as being the servant of the production economy and in terms of economic investment and efficiency. These steps towards ever deeper neo-liberalistic educational policy may threaten to marginalize and cause difficulties to an ever-growing number of children and young people.

The signs of change are clear enough to warrant stopping to contemplate further and more widely, to ask seriously what the future of Finnish children and youngsters will be like, not only as regards their academic success, but also concerning their well-being at school and the quality of their future. (Rinne & Järvinen, 2010).

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Chapter 4
The Intricacies of Educational Development in Iceland: Stability or Disruption?

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Abstract The chapter will explore the development of the Icelandic education system by using a twofold historical perspective. More specifically, the analysis will look at the very long-term development and then the period 1990–2020. Using only the latter focus in isolation may lead to an erroneous interpretation of recent developments and that is why we also include the longer perspective. In the first of three sections, we describe examples of educational development with reference to six characteristics, arguing that these reflect distinctive developmental dynamics, and these are very important in order to grasp the nature of this development. Second, we address educational governance to clarify what changes can clearly be attributed to this important component of an educational system. Thirdly, we note that there are additional examples of specific efforts to influence educational development that could equally have been taken up for discussion to clarify our main argument, which is that specific actions rarely have the intended effects. In this discussion, we claim that Icelandic education has certainly developed and is being governed, but it is argued that the latter has mainly a facilitatory influence on the former. We see little sign of hard governance and perhaps minor signs of soft governance and the influence from outside, in particular from OECD through the mechanisms of social technology.

Keywords Iceland · Development of education · Compulsory education · Governance

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Introduction

Educational development in Iceland is here placed in a historical perspective, using as a pivot the landmark law on compulsory education passed in 1974 (Compulsory School Act No. 63/1974). The importance of the historical account will be emphasized throughout the paper, underlining the slow but gradual and very clear development of education, taking into account participation, organization, and content. This is contrasted with the argument that government statutes, policy initiatives or educational governance act as the prime determinants and movers of change; changes that are signposted by certain landmarks set by government. The paper thus presents an extension of the arguments about the role of the state, as discussed by Müller (1987) where he argues that "the consequences of state intervention must not be overestimated" (p. 16) and in the special case of the expansion of education discussed in Fuller and Rubinson (1992) and explored by Jónasson (2003) for the Nordic countries. From this vantage point, we claim that a crucial way to understand education is to adopt the long-term perspective (Tyack & Cuban, 1995), where landmarks or milestones such as legal statutes and government policies certainly play a role, but mainly a facilitatory one.

We will focus on compulsory education but also note the increasing interconnections with both preschool and upper secondary education. The main emphasis will be on development during the period between 1990 and 2020, but with focus on their roots. We argue that a historical analysis of educational development must be part of the picture when recent developments are attributed to modern rhetoric or social technologies. For the sake of clarity, we argue our initial case by showing clearly visible developments, even though the less visible ones may be more interesting.

In order to emphasize the historical aspect, we introduce six developmental characteristics that we claim are useful for describing and understanding the development of Icelandic education. We then turn to the thematic issue of governance and the role it manifestly plays in shaping our educational edifice. There is a question whether the actual governance operating within our system should be classified as hard or soft and, additionally, whether we see signs of international influences, perhaps through social technologies, in particular involving international organizations, such as the OECD (as discussed below and extensively in Chap. 9). We will also note examples of relatively recent initiatives to improve or modify educational practice, some of which are still going strong. In the light of these foci we will start to draft an emerging picture.

Educational Structures: A Developmental Overview

Iceland has a population of 364 thousand, whereof 90 thousand are in the age range 0–19. There are 72 municipalities, where 70% of the population live in the six largest ones, with 36% living in Reykjavík, the capital city (Statistics Iceland, 2020). The formal education system in Iceland consists of preschool (ages 1–6 years), compulsory (ages 6–16 years), followed by upper secondary and university education. The upper secondary school has both academic and vocational tracks and is intended for the age groups 16–19, but the age range at this level is actually much wider as age does not limit access to the system.

Despite the close administrative relationship with Denmark until 1918, the Icelandic school system, at least at the lower levels, has developed quite independently. This was partly due to the loose connection to Denmark, but also due to the spread of the Icelandic population, which lived for a long time largely in rural areas. For centuries, general education in Iceland was carried out in the homes for a limited group of elite students, particularly boys, under the supervision of parents and the State Church (Guttormsson, 2008). With notable independence acquired in 1874 and then again in 1904, the Icelandic schools developed quite substantially and gradually. The first law on compulsory education was passed in 1907, for 10–14 years old students. The system then gradually developed, with the last addition in 1990 (extending compulsory education to 6–15), thus totaling 10 years of compulsory education (Jónasson, 2008a, p. 176).

An important point in our description is the emphasis on the regularity or continuity of the development of education. Even though the major laws mentioned tell an interesting story, several other laws were passed in the meantime. Many of these are largely statutory changes, which were an acknowledgement or confirmation of what had already taken place or served as clarification of procedure. We also emphasize that many of the developments were in the direction of homogeneity and simplification of the system, largely with the intention of increasing equity between schools and among students. This has been the major guiding principle both behind the educational discourse and government action, and also to ensure more equal status among the teachers at different levels in the system. The system expanded not only by adding compulsory years. Various gradual transformation took place. Different forms of day care or kindergartens and play-schools were merged as a homogeneous level in the system and then defined as a part of the school system in 1994 (Preschool Act No. 78/1994), adopting the term pre-school[2] with the professional staff titled as teachers (even though the children in pre-schools are hardly ever called pupils). All teachers at the three school levels have essentially the same formal status and now all receive 5-year preservice education (Act on the Education and Recruitment of Teachers and Administrators of Preschools, Compulsory Schools and Upper Secondary Schools No. 87/2008). The changes in upper secondary education have led to the gradual increase of the academic part (the role played by the school) in vocational programs. But, even more importantly, a very consistent effort has been made to strengthen the status of various types of vocational

tracks relative to the academic tracks, *inter alia* by strengthening the comprehensive schools, first established already in the 1970s. We have moved a long way from the situation nearly a century ago when all the upper secondary schools had their own dedicated law.

Landmarks and Six Characteristics of Development in Icelandic Educational History

We observe six characteristics of educational development (Jónasson & Óskarsdóttir, 2016). These are described in order to emphasize both the very gradual and continuous change in a certain direction and also the nature of some of these changes.

The first characteristic of change refers to a certain constancy or recurrence of ideas in the educational discourse, which gradually influences the developments taking place through time. This is meant to show that few of the current ambitions, concerns and debates are in fact new. A most obvious example is the steady lengthening of compulsory schooling, both in terms of years of schooling and the length of each school year, which was repeatedly changed step by step by new laws (Jónasson & Óskarsdóttir, 2016, p. 20).

The second characteristic of development, closely related to the first, refers to gradual changes taking place, which are not driven by laws, but many (if not most) may however subsequently be acknowledged by a new statute or institutional developments (Jónasson & Óskarsdóttir, 2016, p. 21). The cohorts grew and so did the system itself (run by the municipalities) and for a considerable period there were more students within the basic education system than were obliged to be there. Thus, the important laws set during this period, and referred directly or indirectly to the number of compulsory years, did not have direct influence on the number of students actually attending. In addressing these matters, the laws were largely a housekeeping exercise.

The third characteristic of educational development concerns the importance of a long-term perspective, of which the underlying long-term regularity of the change taking place is an intriguing and overriding characteristic. Thus, any short-term changes, seemingly abrupt (showing the impact of a given law), may rather be considered as fluctuations in a process of development that is basically robust. For example, the overall growth of the non-compulsory upper secondary education has been quite regular for the last 70 years, in terms of numbers attending relative to the cohort. However, some short-term changes can be seen, particularly in relation to laws passed in the period, without really affecting change in the long-term pattern (Jónasson, 2008a, Figure 6).

The fourth characteristic of educational change is somewhat paradoxical, because it is partly about not changing. This is slowness or inertia to change (Jónasson, 2016), related to what Tyack and Cuban (1995) call the grammar of schooling, but we relate also to whole systems. Some things are simply difficult to change, such as

the mode of teaching and testing and the status of some subjects, and often for very understandable reasons. We mention here two related categories where one contains initiatives proposed in a law, which hardly made a mark and another where changes took a very long time to materialize.

It is very rare to see initiatives set by law that are genuinely new – most are only new in a very formal sense and not in essence. Examples of initiatives that signaled something new and did not succeed are therefore particularly interesting. An attempt, in 1946, to divide compulsory education into vocational and academic tracks failed to get off the ground. Similarly, according to the background notes to the law establishing the unified compulsory education in 1974 (Althingi, 1973, p. 61), there was a clear intention to emphasize assessment *for* learning (formative), rather than *of* learning (summative). However, that did not materialize until two decades later and then perhaps more in form than practice, for example, with examinations in 4th and 7th class (see Chap. 9). The law in 1974 also set the stage for inclusion – a school for all – but the financial support given did more to strengthen the segregation ambitiously promoted with the development of special institutions motioned by the law from 1946 (Jónasson, 2008c). Formal attempts to correct this, were made in the 1990s. But this is a very complex issue as is clarified by Bjarnason, Jónsson, and Gunnþórsdóttir (2016) and analyzed in an audit on the inclusion situation within the compulsory system in 2017 (European Agency for Special Needs and Inclusive Education, 2017), showing that despite considerable effort, at times, the progress made is very slow.

The last two characteristics we use for describing features of Icelandic educational development are of a different type and place the focus on the nature of the change that has occurred. At all levels in our system (notably not only at the tertiary level) we see clear examples of what we categorize as an *academic drift*, which is our fifth characteristic. Academic drift is characterized by programs or institutions, moving gradually towards academic tracks, or towards traditionally dominating subjects, but more importantly revealing a *modus operandi* characterizing academic programs. Some of the impetus for these changes can be detected in the legal texts, even though we maintain that very rarely is there an explicit policy to move in this direction. It is very difficult to attribute these developments to a particular set of actors. The sixth characteristic is what we term the institutional drift and refers to developments where loosely defined and quite heterogeneous practices turn into rather homogeneous institutions, which then gradually merge. Perhaps the clearest example is at the preschool level. Then a host of different establishments caring for young children, during the middle and latter part of the twentieth century, gradually merged into one, namely, the pre-school (Felixson, 2007; Jónasson, 2006). It was established as a unified institution (essentially for the 0–5 year olds) and then became the first stage in the formal school system in 1994 (Preschool Act No. 78/1994). The 1974 law on compulsory education established a unitary compulsory – basic school uniting primary and lower secondary school. Practically every law passed on the upper secondary level aims to take steps towards constructing upper secondary education as an increasingly homogeneous unitary level, e.g. an insistence that students obtain a university entrance examination from whichever

track they choose, and thus diminish the status difference between the academic and vocational tracks and thus reduce the tracking implicit in the system. The rationale behind all these changes is the explicit and sustained intention, as seen in the background text to the proposed laws during the whole of the twentieth century, to develop an open egalitarian system with gradually fewer signs of tracking (seen in the perspective of a century), either within each stage or between them.

We deduce these six characteristics from the development of Icelandic education in order to emphasize the slow, but continuous drift of educational development which we maintain overshadows the effects of the individual laws and regulations set, i.e., the landmarks we normally pay much attention to. These characteristics are also in line with soft governance being the norm and social technology not having an overriding effect (see discussion below and in Chap. 9). Understanding and observing these characteristics of development is of fundamental importance when attributing changes to specific policy initiatives and when one speculates about likely future developments.

Governance, as a Tool for Development

The previous section begs the question: Who govern Icelandic education and what is their influence? Is Icelandic education held within a fairly strict regime (hard governance) or a softer suggestive regime with considerable guidelines? Or is it essentially shaped by tradition and run by the professionals within? In addition, are there signs of influence from outside, e.g. from the Nordic countries or international organizations such as the OECD, (see below and in Chap. 9) through soft governance and mechanisms of social technologies?

All compulsory schools in Iceland, public and private, follow the same legislative frameworks and fall under the jurisdiction of the Ministry of Education Science and Culture (hereafter MoESC). The MoESC has an overarching responsibility for the quality of the compulsory school system in Iceland, administered partly through the Directorate of Education. The administrative responsibility for operating the compulsory level lies squarely with the municipalities. However, other national organizations (in particular the teacher unions) and international agencies influence different levels and their interrelations are often complex, as has been pointed out by several scholars (Robertson, 2008; Steiner-Khamsi, 2016). First, we explore the domestic influences and then turn to those from outside.

Governance in the Icelandic System

Jóhannesson, Geirsdóttir, and Finnbogason (2002) describe how the compulsory schools became more hierarchical and business-like after the implementation of the reform in 1995 (when the compulsory education was transferred back to the

municipalities), with also an increasing emphasis on performance management and efficiency. This development is in line with global trends in education, involving an emphasis on decentralization of the education sector within nation states while simultaneously strengthening monitoring and evaluation by the state (Daun, 2007). Hansen, Jóhannsson, and Lárusdóttir (2004) argue that there are some contradictions attached to the idea of decentralization in Icelandic compulsory education. They point out that the lines laid in the national curriculum, contradicts to some extent the idea that teaching should be almost entirely under the authority of teachers and individual schools. Drawing on Moos (2009), the national examinations and other evaluation measures by the state are examples of social technologies intended to regulate and monitor the conduct of teaching and learning, but there is little evidence that these exert major operational influence on the system.

The issue of decentralization of governance and in particular the role and independence of the municipalities has been central since the school system was formally initiated in the 1907 law. By virtue of their independence, the influence of municipalities tends to be fragile or disjointed. The formal municipal association (The Icelandic Association of Local Authorities), established in 1945, has no direct control over the municipalities but can and does promote discussions and coordinate responses on difficult common issues. It can give advice on policy-making, on professional development and on issues raised by evaluations within education (e.g. Icelandic Association of Local Authorities, n.d.), but there is a clear limit to its authority.

In order to ensure educational quality, not least in the interest of equality, there is a structured external and internal evaluation system in operation (see Chap. 9). A notion of an external evaluation system has been implicit in the laws since in the early 1900s and often modified, whereas the current form came into being in 1995 (Compulsory School Act No. 66/1995). Each school is required to regularly evaluate its success and quality through internal evaluation, and further develop methods in accordance with the school's preferences and local context. The evaluation should lead to an action plan that municipalities are encouraged to follow through with (Ólafsdóttir, 2016). The Directorate of Education (n.d.) has the task to organize and monitor the external evaluation process on behalf of the MoESC, and in cooperation with the Icelandic Association of Local Authorities. The aim of the external evaluation is to monitor the quality of the schools by: (1) Providing the main stakeholders with information on school practices, effectiveness, and development; (2) ensuring operation according the laws, regulations and the national curriculum; (3) improving the quality of learning and school practices; (4) ensuring school reform, and (5) guaranteeing students' rights and legal services (MoESC, 2010). Therefore, the system can perhaps be classified as hard governance, even though no punitive measures are taken when these stakeholders fail to comply.

It would seem when looking at the structure of the evaluation system for compulsory education that the municipalities have a clear responsibility to ensure the quality of education as determined by the operational paragraphs in the laws and the National curriculum (see also Chap. 9). However, by publishing the national curriculum and taking charge of the inspection mechanisms (including the national

tests), much control seems nevertheless to be in the hands of the central government, or its agency, the Directorate of Education. In light of these apparent contradictory notions of control, we will briefly explore the relationship between these levels of the system.

The municipalities in Iceland vary greatly in terms of size and financial capacity and are therefore in unequal positions to meet central demands and standards. Reykjavík is the largest municipality with approximately 36% of the children in the age range 0–16. The four largest municipalities include 60% of children and over 80% of the children live in the 10 largest municipalities, whereas only 10% of the children in Iceland inhabit the 50 smallest (Statistics Iceland, 2020). Some of the small municipalities lack resources readily available to the larger ones, such as access to specialized service and support, which largely depends on their financial strength. Thus, Hansen (2016) claims the system to be weaker overall than it was 1974–1995, where it was covered by eight educational districts under the supervision of superintendents. This raises questions about equality and social justice, perhaps mainly in some of the smaller municipalities.

The pedagogical role of principals is implicit in the act on compulsory education, but so is also their role of distributing finances and keeping to a budget. Principals are, by law, responsible for daily administration of the schools according to the law, regulations, and the national curriculum guide, but also dictated by municipality rules.

According to the Compulsory School Act No. 92/2008, principals have a considerable role in professional leadership (even though it is not absolutely transparent what this entails). There seems to be a gap between the formal role of principals and their actual daily work, as principals in Iceland claim they have too much formal administrative work, which in turn reduces their opportunity to pursue pedagogical leadership role (Hansen, 2013; Moos, Hansen, Bjørk, & Johansson, 2013). Even if principals tend to transfer the responsibility for educational leadership to their assistants, informed partly on the ideology of distributed leadership, it does not solve the problem. Sigurðardóttir (2019) found that assistant principals, conversely, are often swamped with daily administrative work which can have the unwanted consequence of them neglecting their role as educational leaders. The status of educational leadership within the schools in compulsory education therefore remains uncertain. Perhaps the main problem is that the notions of professional or educational leadership may fall into the category of floating signifiers, i.e. may lack the necessary substance or a common understanding. Furthermore, the 2008 act is silent about the financial responsibility the principals may have and their role vis-à-vis the municipalities. It is perhaps generally understood that school administration and professional leadership necessarily includes management of financial resources. However, Hansen, Jóhannsson, and Lárusdóttir's (2002) study shows very clearly that financial management usually takes over the principals' work. Furthermore, principals in Iceland describe different degrees of financial independence, varying among the municipalities in Iceland (Hansen et al., 2004). In an agreement between the Icelandic Association of Local Authorities (2015) and the union of principals, the role of the principal is specified in much detail. Nevertheless, neither the

pedagogical ("shall be a professional leader") nor the financial responsibilities ("shall be responsible for the school's finances"), is adequately spelled out, leaving it unclear how far the responsibility of the principal reaches, in particular how to go about prioritizing different tasks.

A potentially important actor governing the schools are the school boards, elected by the local government in each municipality (Compulsory School Act No. 92/2008, article 6). In addition to the politically appointed members, principals, teachers and parents within the municipality are represented at meetings as observers. The formal legislative power of school boards in Iceland is mainly constructed around supervision and inspection. According to Ásmundsson, Hansen, and Jóhannsson (2008), the legislative framework is not explicit with respect to role and authority on the division of labor between the school boards and principals, which causes uncertainty among both parties. Nonetheless, the authors claim that the actual influence of the school boards is significant given that many municipalities have written school policies to influence the schools within the district (see also Hansen, 2016). But it seems that the influence is normally indirect, with no punitive measures, and thus acquires all the hallmarks of soft governance.

The tradition for active governance of parents, students, and teachers is perhaps not as strong in Iceland as it is in the other Nordic countries (Moos, Nihlfors, Paulsen, & Merok, 2016), even though school councils and parents' associations exist within each school (Compulsory School Act No. 92/2008, articles 8 and 9). Parents, teachers, other staff, and students have representatives in school councils, which then agree on a representative from the local neighborhood to participate in the meetings and the decision processes. The role of the school council is to provide support and advice to the principal, participate in policy-making within the school and discuss the school curriculum, annual activities, business plans, and other school related activities. Furthermore, the school council monitors the safety, facilities and the general welfare of students (Regulation on Compulsory School Councils No. 1157/2008). Parent associations support school practices as well, but they have a weaker role (Compulsory School Act No. 91/2008, article 9).

The Icelandic Teachers' Union is an actor that has considerable influence in Icelandic education (Ragnarsdóttir, 2018). The union negotiates bargaining agreements, advises when rules and acts in the field of education are designed, guards the teacher's profession and their working environment, has a seat on several councils and advisory panels, and participates actively in public discussion on education. Traditionally, teachers have not had a clear legal governance function, however, there is a provision for a teacher council in a recently issued act, which includes a wide ranging advisory role, and where the Icelandic Teachers' Union will have three out of eleven representatives (Act on the education, competency and recruitment of teachers and administrators of preschools, compulsory schools and upper secondary schools No. 95/2019).

External Influence

The significance of the Nordic influence with regard to the development of Icelandic education is generally accepted (see Chap. 9), but the education system in the country has certainly been influenced from other directions as well. Iceland has for a long time been an active participant in a number of international organizations, notably being one of the founding members of OEEC (later OECD) in 1947. The influence of OECD on education in Iceland can be traced to the 1960s. Iceland became a member of the Council of Europe in 1950 (Government of Iceland, n.d.-a) and UNESCO in 1969 (Government of Iceland, n.d.-b). Though not a member of the European Union, Iceland has participated in its programs (e.g. Erasmus+ programs) through the European Economic Area (EEA). It is always difficult to establish when similarities among systems reflect direct influences from other systems, models or ideologies (such as neo-liberal ideas) or from international agencies, steered by social technologies such as indicators and comparisons (Moos, 2009). The main challenge is to distinguish between ideas that are in line with a certain ideology or discourse and those that are directly influenced by it. The specific question from that perspective is to probe the extent to which ideas are borrowed or adapted, or perhaps developed relatively independently.

Iceland took some progressive international actions within the education system from 1965–1985, in particular through the establishment of a department of school development within the Ministry of Education (Kjartansson, 2008). But despite the OECD's increasing emphasis on the connection between human capital and education, it failed to markedly influence Icelandic education policy. A new emphasis in the curriculum (objectives) was added as a result of OECD policies, but more importantly there followed a redefinition of subjects and new approaches to student evaluation. The emphasis on objectives fitted well with the emerging quantitative scientific emphasis within educational research (partly under influence of psychology) which again created fertile grounds for measurement gurus. Policy makers looked for foreign educational models rather than focusing on national traditions, for that purpose turned to the west, north and east (see also Chap. 9).

There is a 30-year history of international performance comparisons, starting with the IEA reading tests in 1990 and then PIRLS and TIMSS (Jónasson, 2008b). Out of all OECD activities in Iceland, the PISA measures have attracted most public attention. The PISA results and ranking once more bring about discussions on benchmarking and accountability of schools, groups, and districts. The outcome of the measures is usually discussed for a short period of time with reading literacy scores receiving the most attention. The international ranking of the nation also enters the public debate explicitly, but overwhelmingly the comparison is with the Nordic countries (Hansen, 2013; MoESC, 2014).

In 2020, the performance of Icelandic students once again dropped in the international PISA scores, particularly when compared to the performance of Nordic students. But the domestic comparisons were also a concern. Boys scored worse than girls. Some rural districts underperformed compared to the capital area, even

though the validity of such comparison has been questioned, because it neglects to account for social background, such as socio-economic or immigration status (Jónsson, 2019). The ministers of education usually express concern when the results are published, and following the 2018 PISA results the incumbent minister launched an action plan as a response to the PISA recommendation (Directorate of Education, 2019; MoESC, 2019a). The action plan mainly focuses on professional development of teachers, an action that had already been partly adopted as policy (MoESC, 2019b). The Ministry, in line with the previous reaction, also emphasized the need to increase the study time in Icelandic (as a basis for reading comprehension). The focus is clear, but perhaps narrow and seems to reinforce existing subject hierarchy, which is line with developmental characteristic five, as delineated above. The problem is that PISA measures address certain academic performance and thus marginalize other potentially important competences. Neither student well-being nor diversity are given top priority, even though both issues are discussed. Overall, there is a lack of focus on the local context as the results are discussed in a general context (e.g. either Nordic or OECD) of outcome and actions. The recommendations emerging from those OECD data collections are undoubtedly the most powerful examples of soft governance within the education system in Iceland.

The institutional message from OECD is well developed (OECD, 2013) and noticeably reflected in the 2014 white paper (MoESC, 2014) and also in the 2016 OECD policy paper on Iceland (OECD, 2016). The same message was clearly delivered at a meeting in 2016 (Icelandic Association of Local Authorities, 2016), organized by the municipalities, the School of Education, the Union of school leaders, and the newly established Directorate of Education. A stronger evaluative model of the school system was in preparation, possibly along the lines suggested by the OECD. An expert from OECD presented the current OECD ideas on the issue. Yet there was a completely different general message implicit in the presentation of PISA 2018. This was clearly evident in the report on the Icelandic results (Directorate of Education, 2019) which bore witness to close cooperation between the Directorate of Education and the University of Iceland in the analysis of the data. A clear tone of reflection and deliberation was presented, also echoing that of the minister. It may be concluded that the increasingly direct influence of the OECD on Icelandic policy, hovering between hard and soft governance, had softened and perhaps showed a perfect example of social technologies at work. This might also echo the broader perspective adopted by OECD in its recent 2030 plans (OECD, 2018a, b).

The influence of the OECD, in particular, but also of the Council of Europe (CoE), is within the realm of social technology, but their influence is not the same. CoE has from the beginning focused on human rights and democracy (Council of Europe, 2020), and thus there is less direct emphasis on the economically relevant skills that are more evident in the OECD work.

A major development at the system level is the introduction of a new national curriculum in 2011. This has definitely had a major effect on the curricular discourse in Iceland, but it remains to be established just how extensive and long-lasting the effects will be (see Tyack & Cuban, 1995, on the fate of several ambitious reforms in the US). Nearly 10 years after their introduction, assessing their impact

remains difficult. The explicit intention of the 2011 curriculum guide was to create a holistic education policy with shared aims and the same fundamental pillars for pre-, compulsory -, and upper secondary schools. The pillars, identified as literacy, sustainability, health and well-being, democracy and human rights, equality and creativity, are supposed to be woven into education at the three school levels (MoESC, 2013). One of the fundamental curricular pillars are democracy and human rights, which reflects the Council of Europe's policy on education for democratic citizenship and human rights education (Council of Europe, 2010; MoESC, 2013). We see the principles promoted by Council of Europe's documentation emerging at many levels within Icelandic education. Democracy is notably stipulated in the legislative frameworks for the three first school levels. Many compulsory and upper secondary schools teach the subject life skills or similar ideas as a cross curricular theme. Life skills focus on democracy and human rights among other related topics. A similar trend is possible to identify in the actions initiated by UNESCO. Even though these ideas were present in the early discourse on Icelandic education, they seem to have stagnated and were not emphasized or developed in policy documents in the latter part of the twentieth century (Jónsson, 2014), but they are, perhaps, returning. Among the most interesting features of this is the notion of student participation and influence of their own education, which seems perhaps less than might be expected given the emphasis on democratic processes. Democracy in Icelandic schools is foremost practiced through representative practices, in which decisions concerning the social life and events are dominant (Bjarnadóttir & Geirsdóttir, 2018; Kaldalóns, 2015). Here we reiterate the same point, i.e., that important, but complex ideas are difficult to develop in the Icelandic educational system. The 2014 white paper on education (MoESC, 2014) did not place these curriculum changes in focus but emphasized the time-honored issues of literacy, vocational education and dropout from upper secondary education.

The reform travelling around the Western world entered public administration in Iceland noticeably in the early 1990s. The reform has been associated with the term New Public Management (NPM) (Mýrdal, Jóhannesson, Geirsdóttir, & Finnbogason, 2001). The main focus of the actions taken in Iceland, as summarized by Kristinsson (2006), was to increase privatization within public institutions, transfer activities from the state to the municipalities and change strategies in budgeting, performance, and human resources. When looking at this development within education, it has been argued that the system of external and internal evaluation implemented in the mid 1990s emerged partly from the governing structure suggested in NPM (Ólafsdóttir, 2016). The budgeting and performance management systems in schools (National Audit Office, 2014) can also be traced to the reform as well as the decentralization of the compulsory education in 1995 (Hansen, 2013) even though we observe that the move in 1995 was essentially a return to the well-established operational mode for Icelandic education. As is argued in detail in Chap. 9, there is a long history of inspection and evaluation in Iceland. In some important ways the characteristics of the system, as we know it today, is similar to what it was early in the twentieth century. Secondly, we have a history of decentralized compulsory education, but there have been fluctuations in how this has functioned. In 1946, a certain

restructuring of a fragmented system took place and the state's role became more important than before, as the school system became centralized and coordinated by the state (Björnsson, 2008). About half a century later, the previously discussed reform, that is often associated with NPM, was implemented in order to increase decentralization within compulsory education (Compulsory School Act No. 49/1991; Hansen et al., 2004). Until then, or from 1974–1995, the administration of compulsory education had been in the hands of the state and the country was divided into eight educational districts (Hansen, 2016). Hansen (2013) claims that the argumentation for the decentralization at the time was grounded in evaluation reports, documents from OECD, and trends from neighboring countries. He also argues that the aim of the transfer was to increase accountability and promote change and thus the reform is traced, at least partly, to international influences, thus making it a candidate for the category of policy borrowing. We would, however, point out that within the education system in Iceland some of the essential features of these ideas already existed way before the 1990s (see Chap. 9). We therefore question if these ideas can to some extent be attributed to international agencies and ideas. The national education history and context should be closely scrutinized when making such attributions and care should be taken to respect the local, i.e., the national context.

Discussion

For the compulsory stage, there have been several distinctive developments, many of which have been discussed or alluded to earlier in this chapter. There are clear signs that both those governing and operating the system have a genuine ambition to move forward. The principal question here is the extent to which these developmental efforts have been initiated and implemented through legislation or governance and how they have fared. By introducing the six developmental characteristics, we essentially argue that it is more the implementation rather than the initiation that has been in the hands of government and the general developmental flow has been relatively stable, seen in the long-term perspective.

At the system level we have, above, emphasized the strive for unity or homogeneity of the 10-year school, by moving away from the primary and lower secondary division of the system towards a unitary compulsory school, "the basic school". This is gradually being achieved. We have also noted the roughly 20 year period (1974–1995) when the administrative responsibility of the compulsory schools was transferred to the state from the municipalities, in a very ambitious attempt, once again, to ensure equity and educational quality as it was felt that the rural areas did not have local support the urban areas had. This is a brief and a very interesting fluctuation in an otherwise robust system, where the municipalities were traditionally viewed as the agents in control, and this position they have recaptured, at least to a certain extent. The larger municipalities were able to cope with the revoked arrangement, but this left some of the smaller municipalities in a vulnerable

situation (which was, indeed, an important reason for the earlier change). Looking in a different direction, Jónsson (2014) has argued that important parts of underlying educational ideals introduced in 1974 have gradually lost their impact, even though it may have partially regained some support in the 2011 national curriculum. It has also been pointed out that the major initiative of implementing the concept of the inclusive school, given considerable impetus in the 1974 law, and much influenced by both practicing professionals and academics, has still some way to go. In terms of governance, the idea of the inclusive school is perhaps the biggest challenge for the municipalities in Iceland, large and small – it is both a very sensitive and a truly complex issue.

During the previous decades, the policy discourses inside the system have been quite vigorous and visible, but it is difficult to ascertain their origin and their actual transformative effects. Here we will briefly note some additional but loosely defined arenas of reforms, that are closely connected to the curriculum and the ways schools are operated. In keeping with the age-old emphasis on reading as the major determinant of the quality of education, and more recently on literacy, major efforts have been initiated by teachers and academics (Eggertsdóttir, 2019; Sigþórsson & Marinósson, 2017), e.g. Byrjendalæsi (e. Beginning literacy) and the "National Literacy Pact" initiated by the MoESC in 2015 (Government of Iceland, n.d.-c). In an attempt to introduce new approaches, perhaps the biggest steps have been within multicultural education, formulated by teachers, municipalities and academics (Ragnarsdóttir, Berman, & Hansen, 2017). This has been crucial given the increase of the number of children from markedly different cultures and countries in Icelandic schools, who also have a first language, which is not Icelandic. There are no signs yet that the momentum of this effort is being attenuated. Moving onto a totally different arena, much interest and even awe, towards the end of the twentieth century, was related to the introduction of ICT into education (Arnardóttir, 2007), as it was expected to totally transform schools. Now many of those ideas have faded in the wake of fascination with the internet and social media. The potential importance of artificial intelligence has not yet entered the Icelandic educational discourse.

In addition, a host of important developments have taken place inside the system, initiated by the individual teachers, or professional groups, some by municipalities and often supported or facilitated by the government. What needs to be established for all of these developments, especially given the characteristics of educational development discussed above, is to locate where the substantive practice and discourse starts, and to what extent it gets off the ground, even before the authorities move in, to formalize, and often to support. We claim that the Icelandic system can be characterized both by strong traditions (which make externally driven modifications difficult), but also by professional strength and independence, which allows initiative, but also makes external modulation difficult.

We have explored certain aspects of the progress made within Icelandic education over a century, with focus on the last four decades. The main question is to whom or to what we should attribute the progress made or the developments noted within the system. In order to address this question we described what we suggest may be six significant characteristics of educational development in Iceland in order

to establish the slow but consistent developments in the Icelandic system. We then looked in particular to governance, the mechanism geared to steer and change. We deliberate if the changes we see are the work of national or local governing bodies or perhaps complex and often implicit interactions of hard and soft governance from within and outside of the national education system. We ask, if the developments we see are primarily due to specific acts or ordinances dictated by governments at the time, or due to specific external policy pressures, or are we essentially witnessing rather gradual developments of a slow-moving robust system in line with very general principles about which there has been consensus? By looking at the arena from several different angles, we practically always conclude the latter. There have of course been several notable statutes on education passed by parliament, and governmental regulations or ordinances, but we claim that in most cases these were to facilitate the ongoing change or acknowledge formally changes that had taken place and may thus be considered essentially as housekeeping exercises that made sense in light of how things developed but were not radical in themselves. Here we echo the conclusion of Müller (1987) and Jónasson (2003), noted at the beginning of the chapter, where the latter analyzed the development of the Nordic upper secondary schools during the twentieth century. A crucial aspect of that story is that very similar changes took place in all the Nordic countries, but it was suggested that these affinities were not due to policy borrowing but rather originated from similar underlying dynamics within the respective systems.

Governance has received much attention in recent decades, both internationally and in the Icelandic policy discourse. Within this discussion we find many important aspects of an ambitious and modern system. Within the educational arena there is clearly much emphasis both on quality (with particular emphasis on literacy education) and equality (in particular equal access and school for all), and governance must address various challenging contradictions dealing with these important foci of education. In order to achieve both equality within the student population and quality for each student a decentralized system has been developed, but with some central constraints. It is based on professional trust towards the municipalities, schools and individual teachers as well as other professionals within the system. This, however, is not the end of the story. Society, embodied in its government considers it necessary to ascertain its responsibility by ensuring that an inspection system is in place, over and above trusting the governing mechanisms at the various levels in the system. At the same time an effort is made to ensure that the routine governing mechanisms are well functioning, at the national, the municipal and the school level.

Our view is that the Icelandic education system has developed substantially, but gradually during the last century and a half, from being non-existent as a system into being a well-developed system as indicated by data underpinning the six characteristics of development discussed above. It is open (and increasingly non-tracking, taking the long perspective) and relies on relatively independent professionalism of the teachers and principals with little emphasis on standardized testing, in particular as the students move from one level to the next. We conclude that the freedom the system has enjoyed to develop gradually has been

beneficial – even though it could, without doubt have reached further in many areas. And governments have, along the line, accepted their role as guardians of educational equality, even though their views vary considerably on exactly how to play that role.

Conclusion

Thus, we conclude that in order to understand the character of an education system and what shapes it, it is important to understand its basic inertial character and thus its historical and cultural somewhat conservative modulation. Even though the outlines and fundamental operations in Icelandic education are in line with other systems, especially the Nordic ones, as demonstrated using a particular example by Jónasson (2003), there may be an Icelandic touch to the character of the system. But, we also observe that there may be something approaching essential universality when considering the dynamics of education, or rather educational change, as our basic thesis seems to bear a strong resemblance to the story Tyack and Cuban (1995) tell about the slow educational developments in the US spanning a whole century.

Thus our strong historical approach draws attention to how gradual the development of education is and suggests that it is not easy to change an educational system. This is perhaps the case when the state and municipal intervention can be characterized by soft governance and external influence, though very visible, has not had very clear effects on either structure or operation. We also imply that efforts to change given those conditions stand and fall by a thorough understanding of the underlying dynamics of an education system as a whole.

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Chapter 5
Production, Transforming and Practicing 'What Works' in Education – The Case of Norway

Ann Elisabeth Gunnulfsen and Jorunn Møller

Abstract This article describes, analyzes and discusses key changes in the Norwegian education system during the last 60 years. It starts with the period from 1955 until about mid-1970s, often referred to as the golden era of social democracy. We will show how this period gave rise to a comprehensive education system, as well as to a public welfare system. During the next period (since the end of the 1980s), the Norwegian education system went through major reforms, influenced largely by new managerialist ideas, and we will discuss how and why new public management began to gather momentum in the 1990s, followed by an emphasis on 'what works' in schools. We argue that both individuals and organizations, often labelled as policy actors, have strongly influenced this change in educational policymaking. Although the basic values about equal opportunities and access for all seem to persist, we might see a process of re-imagination of these values through digitization in the local schools.

Keywords The social democratic legacy · New public management · Policy actors · School reforms · Digital education · Evidence-based research

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The Norwegian Education System 1955–1975: The Social Democratic Welfarist Legacy

Norway has a strong ideological tradition of emphasizing the role of educational institutions in the making of civic society. School access for children from all socio-economic groups has been considered very important. In addition to preparing children to become able employees, the schools should prepare children to play constructive roles in a democratic society. Equity, participation, and welfare state have been recognised as the distinguishing features of the Norwegian model in education, and social democracy, both as political movement and broader ideology has had a crucial impact. The period from 1945 until about 1970 is often referred to as the golden era of social democracy (Telhaug, Mediås, & Aasen, 2006). The cornerstones are citizens' equal rights, responsibility of the state for welfare of all citizens, and the struggle towards narrowing the gaps in income and equality between men and women. The model has also been supported by the labour market model, with collective bargaining, and a developed legislation in co-operation between governments and labour organizations. This corporate democracy can be framed as a form of institutionalizing trust relationships between leaders and employees, and the State has in addition played an active role in securing jobs, i.e. when the market does not work, the State intervenes with various compensatory measures (Sejersted, 1997). In addition, nurturing a national identity has played an important role in the construction of national curricula. However, the model includes some gaps. For instance, the nation building project tended in the past for long to lead to an exclusion of the cultural rights of ethnic minorities in education. This was for instance the case for the Sami people and the Kvens (Stugu, 2001).

The development of the comprehensive school system is connected to the unique tradition of consensus-seeking politics in education. Both the right and left wing parties have sought compromises and agreements on educational reforms. This has its historical roots in the political mobilisation of and alliance between the farmers and the workers. It does not mean absence of conflicts, but there has traditionally been a political will in Norway to base decisions in education on consensus. Farmers' political involvement had a basis in social-liberal values and was also closely linked to the labour movement. The Social Democratic parties were not rooted in radical socialism, and after the Second World War the workers were able to ally themselves with the growing white-collar middle class. In this case the state played a role due to the expanding public sector. This political mobilisation was of great importance for the rise of the Social Democratic parties in the Scandinavian countries, and influenced the development of a non-selective comprehensive school system (Møller, 2009).

A supplementary dimension to understand the history of education in Norway is the very special form of popular resistance that was constituted by anti-elitist lay religious movements in the nineteenth century. People learned to argue against the rulers and stand up for their own arguments through participating in these

movements and hegemony was questioned. In the late nineteenth century Norway was a poor country and, compared to Sweden and Denmark, the country did not have traditional aristocracy and economic elites. It implied a broad public involvement in both economic and educational developments (Stugu, 2001). The local teachers became agents of the civic society. They had the cultural and social capital to act on a trans-local level and to mobilise people to move on. Often the schoolteacher became involved in a variety of activities. He or she ran the local youth club, sport activities, mission society and other charities. Even though the role of teachers as tenets of civic society declined after the Second World War, the images continue to influence the expectations of teachers, particularly in the rural areas. So, as a background for understanding the historical position of teachers in Norway, one has to know that the schools and their teachers played a crucial role in the processes of nation-building and in the shaping of national identities (Møller, 2009).

The regional policy dimension has been particularly central in Norway and throughout history the municipal level has played a strong role alongside a tradition of 'implementation from above'. The responsibility of educational administration at municipal level is shared between professional administrators and elected politicians. Through this linkage, education is connected to broader community affairs. Educational institutions have been and still are important for ensuring the survival of the many small communities in a country where the population is widely dispersed.

The Growth of Neo-Liberal Reforms in Education

During the 1980s and in the beginning of the 1990s, a neoliberal reform gained ground internationally. This wave also hit Norway. Politicians argued that the welfare-state project had turned national and local authorities into unresponsive, bureaucratic organizations (Uljens, Møller, Ärlestig, & Frederiksen, 2013). An alliance between neoliberal and neoconservative approaches whereby both questioned the role of professionals within welfarist systems, generated a call for parents to have a more dominant role in designing education (Apple, 2001). By promoting new public management (NPM)-related features such as local autonomy, devolution and horizontal specialization and flattened municipal hierarchies, the aim was to have more individualized and efficient public service delivery. The introduction of business practices into public education was a main issue for the neo-liberals, while neo-conservatives argued for shared values and control that was more parental.

In the beginning, NPM did not directly challenge the established tradition of schooling, since its main consequences were for the restructuring of the local school administration at municipal level in terms of deregulation, horizontal specialisation and management by objectives. However, the launch of the first Programme for International Student Assessment (PISA) report in 2001 accelerated a move to a policy influenced by neo-liberalism when Norway was listed among the

'lower-performing' countries. This became a turning point in the Norwegian public debates about educational quality (Møller & Skedsmo, 2013). Since then, international league tables based on PISA results have influenced national debates about education. Pressure for increased school accountability became a distinctive hallmark of developing a new educational reform in the new millennium. New assessment policies with an emphasis on performance measurement, expectations about the use of data to improve education and emerging accountability practices characterise the transition process over the last decade (Skedsmo & Møller, 2016). Due to concern with student outcomes on achievement tests the 'what works' agenda was reinforced and newer sets of public management approaches, borrowed from the private sector, were introduced. Simultaneously, crisis constructions of the Norwegian education system opened up the ground for digital technologies to become the best solution. These approaches included performance measurement, quality indicators, incentives and external accountability.

Both individuals and organizations, often labelled as policy actors, have strongly influenced this change in educational policymaking. Such policy actors include: professors and their new improvement and effectiveness models (e.g. Hattie, 2011; Nordahl, 2011; Robinson, 2011); international consultancy firms (e.g. McKinsey), liberal think tanks (e.g. Civita)[1] and supra-national organizations (e.g. OECD and the World Bank,) who provide solutions for 'educational problems'. The concept of "edu-business" captures the growing role of non-governmental organizations, for example McKinsey and Pearson, in defining the educational standards (Ball, 2012; Pettersson, Popkewitz, & Lindblad, 2017). Closely interrelated to the creation of "edu-business" is the exponential proliferation of technological advancement, and Internet-based learning technologies is rapidly dissolving the boundaries previously attached to national policy development. The downside of this development is how international benchmarking may lead to simplistic causal conclusions from aggregated data and uncritical transfer and adaptation of best practices (Saltman & Means, 2017) because the technique of recognizing successful education systems is largely based on the numerical data of student achievements. Such a policy permits educators to focus on uniformity to the exclusion of difference, equity and social justice (Shields, 2015).

In particular, the developments and changes of the Norwegian education system are intertwined with the policy recommendations by OECD (Pettersson, Prøitz, & Forsberg, 2017). Both in a Norwegian context and across the world, OECD has obtained a prominent position in setting the agenda for educational policy by constructing a global policy field of governance by comparison across countries and by providing indicators for best practices (Bieber & Martens, 2011; Lingard, Martino, & Rezai-Rashti, 2013; Møller, 2017). While education in Norway, early on, served as a role model for education and social welfare within the Organisation for Economic Co-operation and Development (OECD), Norway had now become a

[1] https://www.civita.no/ currently led by a former Minister of Education and Research.

country in need of advice from the OECD in order to raise their educational performances. Today international ideals of competition, outcomes orientation and accountability challenge the ideals of publicly funded schooling and inclusive, comprehensive school systems (Prøitz & Aasen, 2017).

Trans-National Influences on the National Structures, Policies and Governance Relations

Overall, the changing social environment in Europe in general has led to new governance structures that provide a particular context for educational reforms, and both the European Union (EU) and the OECD seem to play powerful roles in driving and attenuating policy across nation states. These structures are also affecting the roles and responsibilities of school leaders and the approach to leadership development, but even if the international dimension is both important and constitutive, there are national and historical particularities.

For instance, to some extent, a market approach to educational reforms has been adopted in Norway. However, as a principle, marketization has been less embraced in the Norwegian context,[2] probably because a market of school choice for students and parents is only possible in larger cities, and private providers are by law not allowed to operate as 'for-profit' entities. The population in Norway is widely dispersed, and decentralized settlement is still a desirable aim for most political parties. Moreover, there has also been cross-party consensus to defend the traditional welfare state and a comprehensive school (Wiborg, 2013). Even so, the language of education at a policy level has increasingly been replaced by the international discourse of learning, which implies an economic way of thinking about education as a commodity to be delivered. This new language may erode a broader discussion about education for citizenship over the long term (Biesta, 2004).

Influenced by the NPM discourse, with its focus on strong leaders and entrepreneurs as a vehicle for the modernization project, the interest in principals as managers began to gather momentum in Norway in the mid 1990s. New titles were created for managers at the municipal level, and these people were trained and accredited as managers using business models. It was argued that the problematic PISA findings demonstrated the need for a new governance model in education, and in 2004, a new governance model for education was launched with a focus on deregulation, efficacy, competition and accountability (Ministry of Education, 2004). It also placed leadership and learning at the centre. Teachers and school leaders needed to do better than before, and each school needed ambitious school leaders with positive

[2] In Norway in 2018, only 3.8% of students attended a private elementary school, and 8% of students attended a private upper secondary school. There is a huge regional variety. While 16% of the upper secondary students in Oslo and Hordaland (including Bergen) attend a private school, in Finnmark, fewer than 1% do so (Statistics Norway, 2018).

attitudes to change and improvement. A national quality assessment system (NQAS) was established to help the schools to achieve their objectives in a better way, and simultaneously, it was a tool for enabling national authorities to maintain control of the output through measuring educational outcomes (Skedsmo, 2009). This can be described as a shift in the Norwegian education policy from the use of input-oriented policy instruments towards a more output-oriented policy. Information provided by NQAS offers a foundation for central policy development, coordination and management, and represents what can be called evidence-based policy in a Norwegian education context.

National expectations about using performance data to enhance educational quality are emphasized and local authorities, school principals and teachers are expected to use this information to improve their practice in ways that enhance student outcomes, particularly national test results. The use of new evaluation technologies both by managers at the municipal level and principals to monitor student outcomes can be read as a shift towards what has been termed organisational professionalism, which incorporates standardised work procedures and relies on external regulation and accountability measures (Evetts, 2009). Local autonomy is still highlighted in many policy documents, but it also argued for the need to strengthen the supervisory role of the state, in terms of introducing state inspection, to ensure that municipalities attended to their responsibilities according to the Education Act. These arguments illustrate how centralisation and decentralisation are interdependent processes that occur at the same time, and it echoes the management discourse promoted by the OECD, where a performance orientation is one of the main pillars, closely connected to output control.

School Reforms – Balances Between Educational Discourses

While central regulation was important in building up the comprehensive education system after World War II, decentralization has been more dominant as a reform strategy in the public sector from the 1980s onward, framed as a quality improvement strategy. At the same time, national curriculum guidelines have served as a central strategy. This shows that the relationship between the state, the municipalities, and the schools is rather complex. Historically, the national curriculum can be seen as a "contract" between the state and the teachers, which in practice meant that the schools were governed by the state (Gundem, 1993). This contract implied a division of labor between curriculum making at the national level and local curriculum work, with respect to making plans for instruction practices. On the one hand, the teachers were responsible for following up decisions made by the state regarding national aims and the content formulated in the curriculum guidelines. On the other hand, within these national frames, teachers had considerable leeway to develop locally adapted teaching programs based on their professional judgement (Sivesind, 2008).

The Norwegian national reform, the *Knowledge Promotion,* which took effect in August 2006, included new modes of governing structures, a reformulation of aims in the national curriculum into aims of competencies, and had a focus on students' learning outcomes. Key competencies were framed as five basic skills: reading, numeracy, expressing oneself orally and in writing, and using digital tools. These competencies all corresponded with how the OECD – program 'Definition and Selection of Competencies' (DeSeCo) had developed a response to educational challenges in a changing world and demonstrated how the educational reform was embedded within international trends promoted by OECD. The government also introduced a website, 'Skoleporten' ('The School Portal'), as a databank in which results of national tests, exam results and other educational statistics could be published and serve as a national bank of evidence for building school quality in Norway. This change from management by objectives to steering by competencies represents a major change in Norwegian education policy context the last 20 years. Performance measurement, standards and accountability seem to have become a key part of Norwegian educational reform practices.

The new model was partly motivated by the problematic PISA-findings and partly by the concerns about reducing disparities in educational outcomes across different social groups. Equality and excellence could be better achieved by working in a different way within the educational system. Norwegian pupils' high scores on the international CIVIC study, and their accounts about high self-esteem were not given weight. Hence, specific images of problems and solutions in education were constructed and contextualized, and new public narratives were constructed. The established school practices were segmented into specific problems like low test scores, high drop-outs rate in vocational upper secondary schools, and low discipline. To solve such problem a new system for governing was needed. It was mainly a focus on what can be done *within* the educational system (cf. Oakes & Rogers, 2006).

The school was given the responsibility to develop local curriculum-based aims of competencies. At the same time, there was an increased focus on measurement of achieved outcomes. Although professional autonomy was emphasized, trust in the profession itself seemed to be replaced by trust in the results. On one hand, it was argued that the managerial approach to education aimed at ensuring a basic standard for all, by levelling out disadvantages; on the other hand, it was a push for debureaucratisation and de-centralisation, ostensibly allowing for more differentiation and specialisation (Møller & Skedsmo, 2013). Accordingly, increased local autonomy was intertwined with more national regulation, and this created tensions and ambiguities in governing processes. At the same time, the basic Norwegian values about equal opportunities and access for all seem to persist.

Earlier analyses of the narrative constructions of teacher identity in public documents have emphasized the teacher as a care giver and as democracy oriented with concern for the individual pupil and for a good social climate in classrooms (Søreide, 2007). The new constructions highlighted the teacher as a person with primary concern for pupil outcomes, excellence, and effectiveness, although the caring and

democracy orientation is still part of the construction. So, new elements have been added but also put up-front. The present focus on student achievement in basic skills has resulted in a strong push to reduce education to measurable outcomes (Biesta, 2016), often described as an outcome-based discourse characterised by competition and privatisation (Moos, 2017). At the same time, a major reason for the differences among schools is their diverse sociocultural and socioeconomic student composition – a well-documented fact drawn from decades of research (Nordenbo et al., 2010). This outcome-based discourse can be contrasted to a discourse focusing on the purposes of schooling and democratic participation.

Recently, this reform has gone through a renewal process (Ministry of Education, 2016) resulting in an emphasis on education for democracy and sustainable development. The strong focus on learning, basic skills and foundational literacies remains, but three additional interdisciplinary themes are presented in order to address challenges emerging in society: 'Democracy and Citizenship', 'Peoples' Health and Life Mastery', and 'Sustainable Development'.

Digital Education and Digitization

When the *Knowledge Promotion* was launched in 2006, the need for digital literacy was emphasized. Never before had digital literacy accomplished such status in curricula, neither nationally nor internationally. The strong focus on the use of educational technology gave both a lot of new possibilities, but also challenges for practice in today's school (Krumsvik, 2008). Since then, Norway has become one of the leading countries with regard to accessibility of technology in schools. However, during the first years of enacting the Knowledge Promotion, the evaluation of the reform showed that digital literacy was transformed to increasing teachers' ICT competence (Ottesen, 2013). Nevertheless, the digitization of education in Norway has resulted in a situation that leaves little doubt that it has made its mark both in society and school system to an even greater extent than that of in other countries (Krumsvik, 2008; Castells, 2001; OECD, 2001, 2003). Increasingly, policy makers at municipal level have decided that every student shall have their own iPad or computer, often called one-to-one solution. The ongoing development of portable internet-connected devices has resulted in a steady expansion of one-to-one projects – initiatives enthusiastically supported by the technology industry (Blikstad-Balas & Davies, 2017). In 2017, almost half of the municipalities had decided on a one-to-one solution for lower secondary education. In these municipalities there is a clear tendency for similar decisions to be made also for lower levels. The survey "Monitor school 2013" has shown that personal computer usage is widely used in upper secondary education, less in the lower secondary school and least in the last part of primary school (Gourvennec & Skaftun, 2019).

Paying for and choosing digital tools as iPads or similar devices for student use in classrooms are mostly made by local education authorities while the teachers still have autonomy over the choice of paper-based learning resources (Gilje et al.,

2016). The policy solution for daily digital learning activities builds schools into data-production centers, responsible for constantly recording and auditing every aspect of student and school performance (Finn, 2016). Leaders are being called on to act on their data to improve their organizations, often using "learning and management-systems (LMS) to assist their administrative tasks (Selwyn, 2016). An increasing number of commercial actors are directing their business models and practice to engage in education, such as Google with its Google Apps for Education (Lindh & Nolin, 2016). In the Norwegian education context municipalities and local education authorities are subjects of commercial actors' marketing of i.e. the cheapest and best LMS systems to use in their schools (for example It's Learning, Blackboard, Fronter, and Canvas). Meanwhile, existing commercial 'edu-businesses' such as Pearson – a global textbook publisher – have moved to become prominent educational software providers and hence, a key collector of educational data (Hogan et al., 2016).

The fact that Norway is a leading nation in computer density in an educational context, raise important questions about the issues of data inequalities, the rise of so-called 'dataveillance' and the reductionist nature of data-based representation (Selwyn, 2016). Dataveillance is connected to central policy level and intentions of control and surveillance over student learning and standards for school quality. Dataveillance creates concerns about power, control and performativity as it can be understood as associated with the role of digital data. Digitization is reinforcing and intensifying the culture of managerialism within education, and data is now a core element of managerialist techniques of accountability, i.e. measuring, 'evidence based' practice, and effectiveness (Selwyn, 2016). Ozga (2009), among others, has shown how the use of data has been particularly notable in the growing use of goals, targets, benchmarking, measurement, performance indicators and monitoring within the English education system. Data-related technologies of governance are also noted in the Norwegian education context, as national testing and large-scale student test results have gained focus (Gunnulfsen & Møller, 2017). The digitization of education in Norway can be associated with the rise of the term 'policy by numbers' (Lingard, Creagh, & Vass, 2012), and this approach is closely connected to "the what works agenda".

Substantial comparative research has presented how data play a key role in efforts to equalize the complex European education situation, with data systems being used to 'construct policy problems and frame policy solutions beyond and across the national scale' (Ozga, 2012, 440). Similarly, the crisis constructions of the Norwegian education system after the failing results in the first PISA tests in 2000 have developed a ground for digital technologies to become the best solution. The national tests in Norway are planned and conducted with aim to measure the similar basic skills which are tested in PISA, where reading and numeracy are chosen as two of the most important competence areas. These competencies, as well as the national quality evaluation system, school performance measures, and test comparisons, correspond with the OECD – program DeSeCo,. The numbers are increasingly important in the ways the Norwegian education authorities monitor, steer and reform the national education system. That is, the "the technology of statistics

creates the capacity to relate to reality as a field of government" (Hunter, 1996, p 154). Data production, data management and the associated state of 'constant comparison' underpin how the Norwegian education system is increasingly governed by central policy initiatives influenced by dataveillance through national testing and PISA-results.

Also, studies in a Norwegian education context have shown how the agenda of standardization and digitization is seeping into the Norwegian arena of national policy on school inspection (Hall, 2017; Hall & Sivesind, 2015). The question of a "one-size-fits-all" approach, through the use of digital tools as rubrics and surveys is raised, where templates actively shape the thinking of actors involved on both the meso- and micro-levels of policy enactment (Braun, Maguire, & Ball, 2010; Weick, 2009). Digitization is hence also part of new modes of school inspection in Norway. A recent article about challenges for quality and competence in Norwegian schools on the national authorities' web-site states that digitization has many aspects. It is e.g. related to educational innovation, to organizational innovation and to new ways of communicating and informing. It also brings new challenges with both legal and ethical aspects. An example of this is social media which contributes to blur or make the distinction between school and student leisure time unclear, and also where the boundary goes for what is the school's responsibility. Digitization and new technology can create privacy challenges. There are high expectations for school principals when it comes to developing the school as a digitally mature organization. School leaders should be able to plan and support the teachers' pedagogical work with ICT, through competence and organizational development. They must also have good expertise in obtaining and managing digital content, teaching materials and equipment, as well as facilitate infrastructure in line with school plans and educational goals (Udir.no, 2020).[3]

Evidence and What Works

The discussion about evidence-informed policy research is not new. In 1995, a report published by the OECD raised the issues underlying the discussion and identified weak links between research, policy and innovation in education (OECD, 1995). Twelve years later, the call for evidence-based practice research or the 'what works' agenda was reinforced with the report, 'Evidence in education: Linking research and policy' (Burns & Schuller, 2007). Although there was no agreement within the OECD on what should count as evidence, it was argued in the report that identifying what works was crucial in educational policymaking and that the best method for achieving this involved doing randomized controlled trials.[4] (Gorard &

[3] https://www.udir.no/kvalitet-og-kompetanse/etter-og-videreutdanning/rektor/nye-utfordringer-for-skoler-og-skoleledere/

[4] This type of research has its origin in medical research based on 'randomized controlled trials' aiming at testing the effect of drugs.

Cook, 2007). That is, results from quantitative, large scale data is by many believed to represent the best evidence for developing schools and setting standards for good school quality which is by OECD defined as important to improve education (Møller, 2017). In the current curriculum reform in Norway, Fagfornyelsen ('Subject Renewal 2020') it is explicitly expressed that the teaching profession must build its professional practice on shared values and a common research and experience-based knowledge base.[5]

The need for applying evidence-based research in improving schools has no doubt become a buzzword and almost a panacea for Norwegian policy-makers during the last 15 years, greatly influenced by professors with school effectiveness models, consultancy firms and supra-national organizations arguing for educational "best-practices (Møller, 2017). One argument is that evidence-use will never be fully or meaningfully realized unless school leaders prioritize evidence-based practice as a school commitment, including an accountability regime shaped by evidence- informed decisions (Brown & Zhang, 2016). While it is easy to follow an argument how essential it is to develop systematic knowledge about school effectiveness and improvement based on research, politicians' arguments are often linked to a special kind of research, i.e. research based on large-scale quantitative methodology aiming at providing standardized and representative knowledge which can be used across different context As such, evidence-based research in education becomes closely connected to the so-called 'what works agenda' in school improvement in which 'randomized controlled trials' are highlighted as the gold standard of research (Simons, 2003). Although such research is beneficial in many cases, knowledge with great relevance for research-based policy and practice in education might be lost if other types of knowledge are excluded. In other words, the problem is not the application of this methodology as such, but the "categorical" or "instrumental mistake" (Skjervheim, 1976). For instance, qualitative studies are not part of an established evidence hierarchy and findings based on such studies are therefore, often dismissed. It seems 'forgotten' or ignored that questions like what it means to ask for knowledge that works in schools, or what it means for practice to be based on evidence, have for long been strongly debated in educational research (Kvernbekk, 2011, 2013).

Media outlets have been particularly active in reporting results of performance indicators and play a pivotal role in making this information available and known to a wide audience. As such, the media is strengthening the production and transformation of 'what works' in education. An extensive study based on a database of 3047 newspaper article in Norwegian local newspapers from 2004–2018, has examined how the press reports on national testing and demonstrates how the media mainly uses test results to rank, compare, blame and praise schools, municipalities and counties (Camphuijsen & Levatino, 2021). Often the results are presented as indisputable facts. This media coverage seems to reinforce the perception of test scores as a valid measure of school quality.

[5] https://www.udir.no/lk20/overordnet-del/

However, there is, currently, an ongoing public debate in the Norwegian context about these issues, and some journalists call for more involvement in the debate from left-wing politicians about what counts as evidence to improve educational quality (Skurdal, 2020). Disagreements regarding methodological shortcomings within school effectiveness research and knowledge claims are questioned in academic journals (cf. Bjerrum-Nielsen & Malterud, 2019) but among politicians it seems as if much power is concentrated in an echo chamber shaped by policy actors who are promoting the so-called evidence movement (Bjerrum-Nielsen, 2019; Fladberg, 2019). Research that addresses issues of for instance social justice have tended to be less appealing among politicians compared to studies which provide hard science, statistics and evidence about what works. As a consequence, ideologies of technocratic rationality dominate knowledge claims of educational policymakers and it is not acknowledged that seemingly politically neutral models of "best practices" promoted by for instance OECD, are still politicized (Møller, 2017).

In Norway, national testing and PISA-results represent types of policy instruments which constitute condensed knowledge about school quality, student learning and teacher practice which in turn structure public policy according to its very own logic. Closely linked to this is the notion of accountability and the production of evidence that proves the effectiveness in terms of measurable results of whatever is accomplished in the name of improvement (Williamson, 2017). Performativity make the question of what counts as worthwhile activity in education into the question of what can be counted and what evidence can be given for it. Such a policy permits policy-makers to focus on equality and uniformity to the exclusion of difference and equity. Therefore, it is important to raise questions like 'what type of knowledge is used by politicians, and who are regarded as knowers and why?' (Gunter, 2012). In addition, we need researchers who whatever methodology they use, acknowledge limitations connected to all kinds of education research, included their own preferences.

Conclusion

In this chapter, we have traced changes in the Norwegian education system during the last 60 years. We have demonstrated how both individuals and organizations, often labelled as policy actors, have strongly influenced a change in which educational policymaking increasingly is legitimized by so-called evidence-based research. National expectations emphasize the use of performance data to enhance educational quality, and it echoes the "what-works" – agenda promoted by the OECD, where a performance orientation is one of the main pillars, closely connected to output control. In addition, digitization is reinforcing and intensifying a culture of managerialism within education where data has become a core element of managerialist techniques of accountability. Today, the need for applying evidence-based research in improving schools has become a buzzword and almost a panacea for Norwegian policy-makers. While disagreements regarding methodological shortcomings within school effectiveness research and knowledge claims are

questioned in academic journals, among politicians it seems as if much power is concentrated in an echo chamber shaped by policy actors who are promoting the so-called evidence movement. The basic values about equal opportunities and access for all seem to persist, but we might see a process of re-imagination of these values through digitization in the local schools.

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Chapter 6
Evidence in the History of School Reforms in Sweden

Daniel Sundberg

Abstract This chapter addresses the question of what counts as evidence in education from a historical perspective, with a focus on how different knowledge traditions have informed policy-making and educational reforms in Sweden. Four phases are identified. In the first phase during the post-war welfare expansion from the late 1940s to the 1960s, the rational planning of education was led by values such as equality of justice, solidarity, social security, and social mobility, and it was underpinned by scientific knowledge. The educational researcher was given an expert role and an adversarial mode of policy research emerged. During the second phase from the 1970s to the 1990s, this research role was called into question when, for example, the sociology of education brought democracy and equity dimensions into the policy exchange. Alongside the interpretative, qualitative research paradigm being challenging, the practice turn with professionally-relevant knowledge took place in the third phase of restructuring reforms in the 1990s. The fourth, current, contemporary phase is characterized by a downward shift toward immanence and instrumentalization as research is increasingly becoming a means for "what works" during the present performative accountability reforms. The chapter ends with some challenges for the future of educational research in the Nordic countries.

Keywords Education reforms · Education research · Evidence · Knowledge · Policy-making · Sweden

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Introduction

Against the backdrop of the on-going, international, evidence-based movement in the education sector, this chapter outlines the interplay between education research and major education reforms since the 1940s in Sweden. The text explores some of the historical trends of linking research to education policy and professional practice through four different reform phases: the period of rational planning (1940–1970), educational expansion (1970–1990), educational restructuring (1990–2010) and performative accountability (2010–present). While such an endeavor can draw on a substantive body of research on major policy shifts in Sweden, to a large degree, the links to the influences from education research still remain unexplored. One objective is therefore to develop knowledge on how the role of evidence in education reforms has been understood in a Swedish educational context and how such a trajectory is connected to Nordic educational policy-making.

First, the chapter explores how concepts such as research-based and evidence-based practices have been framed in educational discourses in the Nordic context. This is certainly not a new phenomenon. The chapter will examine different knowledge traditions that have provided the knowledge and evidence that are considered as valid in education reforms. By adopting a general definition of research evidence as epistemic discourses that render public legitimation at specific times and in specific places, rather than as a method that is considered as a "gold standard" (i.e., an experimental methodology), an institutional approach is beneficial. The empirical material for the study includes a selection of some key policy initiatives that are intended to show how education reforms and different strands of educational research have changed over time as new configurations have been institutionalized.

Secondly, drawing on the sociology of knowledge and of science and technology studies (STS), the analysis is directed at displacements over the four periods regarding conceptualizations of educational knowledge. The chapter will explore gradual shifts not only in the legitimation process, but also in how an increasing number of policy actors and organizations are advancing their positions in reform coalitions and networks by building policy imperatives based on various knowledge traditions. Several policy initiatives at the present time—guided by performative accountability—are characterized by an increasingly active and ambitious drive with the aid of "research evidence" to produce direct changes in teacher education, school and teaching practices, and to improve student performance at school. In addition, initiatives are becoming even more focused on pre-formulated targets relating to the actual effects and performative outcomes that the policies are intended to accomplish. The chapter ends by addressing some major current challenges, actualized through the Swedish historical record concerning the idea about evidence in education.

Evidence in Education: Exploring Knowledge Traditions and Positions

What is evidence in education? What role does educational research knowledge play in education reforms and policy-making? This chapter explores these questions as they relate to the Swedish and Nordic context. There are, however, a number of difficulties in answering these questions that need to be addressed and tackled. For example, given the hyper-differentiated discipline of education research, what are the major knowledge and research traditions that contribute to policy-making? Educational researchers do not agree on what the core problem should be, on what epistemological resources should be used, nor on how explanations should be valued. In this chapter, rather than being polemic from a specific position, I will attempt to synthesize and point to some general divisions that have been historically established. Given the purpose of exploring wider patterns of the interplay between educational research and education policy in the Swedish context, this chapter elaborates on three knowledge traditions in Swedish education research; namely, a behavioral and statistical knowledge tradition that originated from the close interplay with psychology at the beginning of the twentieth century, a theoretical and conceptual knowledge tradition originating from the close interplay with the sociology of education in the 1970s, and a qualitative case-study approach that emerged in the 1990s due to professional demands for relevant knowledge (Whitty & Furlong, 2017). One key question here is how notions of evidence are linked to these different knowledge traditions in specific ways.

The argument that is put forward is that the current so-called evidence movement and its conceptualization of evidence is related to specific historical knowledge traditions, as they have framed our understandings of evidence in education discourses. The "what-works" assumptions rely on a number of premises. One core assumption is empirically testable hypotheses via experimental procedures that can be dated back to the emergence and institutionalization of the discipline of *Pedagogik* in Sweden. During the first decades of educational research, a biological–psychological strand gradually pushed the philosophical north-continental tradition aside as the new professors tried establish the discipline on a solid "scientific" base with the aid of behavioral-test psychology. This tradition and its principle of objectivity held a strong position in the field of education and had a major influence on school reforms in Sweden in the rational planning phase of post-war politics in the 1950s, as we will see in this chapter. The idea that education research should bring data and statistical evidence into policy with the aid of test psychology is anything but new.

However, alternative positions have indeed challenged this stance. Later on, in the 1970s, the new sociology of education enabled forceful attacks to be made on such premises. As it expanded from the 1970s onwards, the critique also came from professionally-oriented education research that this tradition was distorting the "authentic nature" of education. Underpinning evidence-based education has an interest in improving the system of "diagnosis, inference, treatment," which it is supposed to share with the health sector, aiming at producing good results as is the

case for evidence-based medicine (Bridges, Smeyers, & Smith, 2009). While this has been an insistent hope for policy-makers, researchers from some research strands and many professionals in education have been skeptical. Even from a more philosophical and theoretical position, such assumptions have been refuted as misguiding, as they preclude the consideration of essential educational aims and purposes. In order to produce evidence and knowledge for effective interventions, often through experimental research and most notably in the form of randomized controlled trials, goals need to be fixed and controlled. Acknowledging that all education has a telos and some purpose means that what works only has meaning in relation to specific aims or objectives, about which there are generally opposing views. Such an understanding was not provided by the paradigm of test psychology, as we will see in this chapter.

A reorientation from education as a behavioral science to linking education research to the social sciences took place in Sweden during the 1970s. This reconceptualization was theoretical and conceptual and drew on the emerging "new sociology of education" (Young, 1971). Various positions were developed by drawing on, for example, John Dewey, who argued that empiricist notions of science are based on a "spectator theory of knowledge" (Dewey 1929/1984, p. 163), and Jürgen Habermas, who talked about a "copy theory of truth" (Habermas, 1971, p. 69), or Basil Bernstein, who discussed the ideological reproduction of knowledge (Bernstein, 1977). This was generally referred to as a crisis of representation among researchers. A struggle between the different theorizing conceptions ensued. Most of these conceptions were based on some kind of "post-empiricism" or "post-positivism." This transformation was, by then, already prepared for on a philosophical level by the "linguistic turn" originating from post-Tractatus Ludwig Wittgenstein. The return of a grand theory in education discourses entailed a reorientation of educational research, not only by bringing data into policy-making, but by unpacking different knowledge interests and ideological underpinnings, reframing educational problems, and illuminating their structural elements.

The third knowledge tradition informing the educational discipline is a practical one. By the 1990s, new demands were being placed on educational researchers to provide useful knowledge for the profession. At the time, proponents of the qualitative turn opposed treating education in the same way as medicine practice and reducing complex aims and methods into a simple, linear cause-and-effect relation. Rather than the push and pull of educational interventions or speculations from grand theories, knowledge for the development of educational practices was about understanding and meaning-making, and reciprocal relations in specific contexts. Qualitative researchers argued that this required discrete judgments being made by experienced professionals (see e.g., Carlgren, 1994). Rather than statistical evidence or abstract theoretical explanations that were distant from "authentic" practices, a new science of education based on clinical teaching practices, learning science, and that was related to pre-existing understandings among reflective practitioners was sought. Such qualitative case-study approaches are guided by an ecological rationality and were, at the time, a critical response to the trivialization of

educational practice. By reference to, for example, constructivist assumptions, knowledge is not fixed, but is a way of doing and acting in the world.

These three knowledge traditions and their different knowledge interests, briefly outlined, are constitutive elements in the configuration of education research in Sweden and the way in which evidence has been conceptualized. We will now go on to see how these epistemic discourses have contributed knowledge to educational policy-making in the different phases of educational reforms in Sweden.

Evidence in Educational Policy-Making

The Swedish Case

The Swedish modern school system began to be built up following the Primary School Charter of 1842 (*folkskolestadgan*). Although school then became compulsory for children and the municipalities were obliged to establish schools, it took many decades before different conditions were nationally regulated within the framework of a unified education system. For a long time, a parallel school system remained in place, with primary and lower secondary schools, and with higher education classes for the upper classes (*läroverk*). Mobilization at the end of the nineteenth century for democratic reforms and every person's right to education was brought about not least due to the popular movements acting as a driving force. With inspiration from Denmark and the reformer Nikolaj F. S. Grundtvig (1783–1872), for example, folk high schools were growing in number and were closely connected to political associations, free churches, and sobriety organizations.

It was only at the beginning of the twentieth century that the reforms systematically related different disparate school forms and coordinated them within a unified education system. At that time, educational policy was very much about the church's power over primary schools and educational institutions in relation to the nation states in the Nordic countries. The idea of a common lower-level school began to grow stronger in the early 1900s. In 1905, an educational reform brought in a new degree in Sweden: the real-school diploma. It was then based on a curriculum without Latin. The second stage of the educational institution, an abbreviated high school, was completed with a student degree. In this way, Christianity's position in schools and in teaching began to be re-examined. The church, state, and municipalities became actors in education policy, where several fundamental conflicts between state and religion, public and private sectors, and science and ideology emerged. Individual debaters who were cultural personalities began to play an important role, but so did the popular movements and the increasingly organized political parties in promoting civil rights.

As cultural assumptions about education started to be questioned, the scientific legitimation of education reforms was becoming increasingly important for policymakers. Additionally, the demand for scientific answers to societal problems started

to be heard in public debates. In the university and college arenas, a minor expansion was underway during the first decades of the twentieth century. The Universities of Gothenburg and Stockholm were, for example, founded on private initiatives in the late 1800s as challengers to the two prestigious universities in Lund and Uppsala. They later became part of the state college system that emerged at that time. Additional colleges were gradually being added as the demand for vocational training for engineers, economists, dentists, teachers, nurses, and so on increased due to society's modernization and the emerging labor markets. The science of education was entering the universities as the demands increased to provide teacher education with a firm knowledge base from the test-psychology paradigm. As the demands for political action grew, hard science involving "real scientific facts" was called for. Policy-relevant educational research needed to provide data on the societal problems to be solved.

Education Research and School Reforms

From the twentieth century onwards, the modernization processes progressively led to a greater scientification of society and to the socialization of scientific knowledge. Like other publicly financed ranges of activities, science is expected to produce products that are relevant to society (Wagner & Wittrock, 1991). The educational area of knowledge has, however, ever since its institutionalization at Swedish universities in the early 1900s, grown in close interplay with education system reforms, from preschool, to higher education, and to adult education. The expansion of the education system was accelerated by processes of democratization, economic effectiveness, and rationalization. By referring to science and rational consensus, major systemic changes could be legitimated in the public domain, bridging various social forces and interests (Lindensjö & Lundgren, 2000).

The educational policy process can be defined as an authoritative allocation of values supported by legal, economic, ideological, and accountability instruments. In terms of education and schools, the most central areas concern who should have the power over education and the school (principal), what should be dealt with (assignments and curricula), and how responsibilities should be shared between policies, guardians, and professionals (e.g., reviews of operations). The public trust in civil servants in the Nordic countries for such scientific legitimation has been a cornerstone of policy-making, as, for example, was addressed by the School Committee of 1946:

> Scientific research and practical experimentation produce the best recommendations on which pathways lead to the goals that have been determined. In problem areas where comprehensive and thorough scientific investigations have been carried out, the word of psychological and education research should be decisive (Statens offentliga utredningar [SOU], 1946b:27, p. 86).

Following this modern assumption on policy-making, education reforms were "systemic": They operate at the supra-school administrative level, rather than involving a project or initiative that only shapes a handful of schools. A reform is "planned," and is thus an intentional act that follows the legislative procedure of liberal democracies, preferably in experimentation periods, rather that stemming from unplanned changes such as demographic or personnel changes that do not occur intentionally. Finally, education reforms are "legitimized" by knowledge**:** They should not only rely on common sense, narrow ideologies, or public opinions, but on the best available evidence or knowledge that is known at the present time. Reforms can include wider systemic changes in the structure of education systems (education reforms on structure, financing, accreditation, etc.) and can also have a narrower focus on aspects such as the curriculum, standards, or assessments, and can be referred to as school reforms.

Education Research and Rational Planning (1940–1970)

The exceptional expansion of educational research after the Second World War must be understood in view of the role that the discipline acquired in the second epoch of modernity—"organized modernity"—as an instrument of social planning (Wagner, 1994). As two major bureaucracies (the Warfare and the Welfare bureaucracies) were rapidly growing in many Western countries, the development of the empirical social sciences got a huge boost. *Pedagogik*, along with other social sciences, became an "assistant science in service of administrations" (Habermas, 1971, p. 299). The educational research took shape as part of, and intertwined with, the national welfare system that was expanding strongly during the post-war period. The 1950s began the era of major school reforms, and civil servants and school researchers began to collaborate in new ways. In 1959, the Swedish Minister of Education, Ragnar Edenman PhD, an academic and social democrat, proclaimed that science was "the most dynamic force in the developing society" (Sejersted, 2005, p. 234).

Behavioral psychology still provided the basis from which policy-relevant educational knowledge was built. Research sought to derive marketable action programs from the scientific evidence including everything from the organization of the education system to the subject teaching in the classroom. One prominent example of the latter is the so-called educational technology (*undervisningsteknologi*), which was sanctioned for primary and secondary classroom curriculum application. The experimental activities mainly involved asking empirical questions that then had to be answered through scientific investigations. Many of the teaching technology issues originated from the US Army training during the Second World War. They concerned the application of knowledge from scientific experiments for practical purposes. Ahlström and Wallin (2000) argue that this emphasized (i) the importance of the detailed target specification in behavioral terms as a starting point for planning and as criteria for performance; (ii) the eclecticism that was due to a lack of an

integrated base of substantive knowledge and a conscious value base; and (iii) the empiricism expressed in the emphasis on evaluation (Ahlström & Wallin, 2000). In this way, pedagogical and didactic research came to be incorporated into the behavioral sciences and further distanced itself from the philosophical and social science knowledge traditions. The educational technology approach was a response to the massification and expansion of education at the time and part of a streamlining and standardization process (Sundberg, 2019). The behavioristic principles were effective in reducing the complexities of the teaching process by packetizing ready-made school knowledge content as quantified measurable steps of application provided by test psychologists. There were alternative positions, not least of which was the dialogue pedagogy (*dialogpedagogiken*) and "project-oriented teaching," which, following the progressive focus on the child, opposed the transmission model of education (*förmedlingpedagogik*). Such a rejection is, for example, found in the kindergarten commission (*barnstugeutredningen)* (SOU, 1972:26).

Social democracy and the idea of a people's home, combined with a broad consensus on school reform, played an important role in the major reforms implemented during the 1950s and 1960s, which has since been called *the golden era of school reforms*. Several major school investigations were carried out where representatives of the various school stakeholders were represented and extensive referral rounds were anchored to the proposals. Responsibility for planning, implementation, and evaluations lay with the school board (*Skolöverstyrelsen*). A further step in creating a uniform education system was taken through a series of parliamentary decisions during the years from 1968–1970. The high school, various vocational schools, and training schools were then brought together as a joint upper secondary school run along different lines (a later program division took place with the 1994 curriculum).

A major educational policy reform phase took place after the Second World War and continued until the 1970s. It was then about modernizing and democratizing education, giving children and young people equal opportunities for education regardless of social background, gender, place of residence, etc. Elementary school, high school, and higher education were expanding rapidly under a general development optimism and consensus and was guided by social engineering. With the addition of compulsory schooling, the different school forms—the real schools, the folk schools, and the girls' schools—were integrated into a common "unitary school" in the 1960s. Behind the reform lay two decades of tough educational policy discussions and extensive investigative and research efforts. Already the state commission on schooling in 1940 had conducted more than 40 investigations on practical aspects of integration and differentiation in a unified system, and in Sweden this was called "the big question of differentiation." In 1950, a principle decision was made on nine-year compulsory schooling and an experiment with a common school was initiated.

The researchers who were called in as experts in the major school investigations were mainly psychologists. Halfway through the century, the *Pedagogik* discipline was re-organized within the university structures. Psychology acquired an independent status as an academic discipline after having been the responsibility of the

Pedagogik professors, even though it was an indistinct responsibility. When this change took place, the chair holders were allowed to choose if they would prefer a chair in psychology or in educational psychology (*Pedagogik* with a specialization in psychology). The university committee (SOU, 1946a:81), which had to solve the problem, proposed one chair in psychology and one in *Pedagogik* and educational psychology (*Pedagogisk psykologi*). All of them chose psychology and new professors were recruited to the *Pedagogik* chairs, which indicates the order of the dominating epistemic discourses at the time.

Educational Expansion and Professional Knowledge (1970–1990)

As the education sector was rapidly expanding, new demands were placed on educational research to provide solutions to system-related problems. Research activities increased heavily, especially in the 1960s. In the middle of the 1970s, more than 300 works were published every year (Lindberg & Lindberg, 1983). From 1948 to 1971, more than 1000 titles were published. The number of scientific products increased substantially, dissertations were published within all problem areas, and the output from each institution (department) was, with some exceptions, "fairly homogeneous and, from a quantitative point of view, research about schooling dominated" (Lindberg & Lindberg, 1983, p. 54). Some have called it the "rationalistic revolution" (Wagner & Wittrock, 1991). It included new techniques for system analysis, program budgeting, social indicators, commissioned sectoral research, and future research that were applied to policy problems in different sectors. On the institutional level, new bodies for policy analysis and assessment were created at the central ministries, government agencies, and major government commissions. One could conclude that *Pedagogik* during the 1960s and 1970s was by and large an "extended arm" for state interventions in the school sector.

Meanwhile, the reorganization of Swedish comprehensive schools was at a critical juncture. An important governmental report proposal for a new teacher education college was presented to the government in 1952 (SOU, 1952:33). What is important here is that the teacher education organization was not being thought of as part of the university organization. The National Board of Education was proposed as the governing body, which was also responsible for the compulsory and secondary school levels. A certain specialization was thought of as being desirable: "It should give preference to research directed toward current issues in the school, while research directed toward the history of education should be withdrawn" (government proposal, 1954:209, p. 193; my translation). The so-called seminarium tradition was not challenged but lived alongside the discipline of education in the university reform of 1977, when all post-secondary education became part of the higher education system. A new parallel organization for school research at the teacher colleges was built up, causing major controversies at the established higher

education institutions. The tensions between the discipline and the professional preparation of teachers were a main theme throughout the century; that is, rigorous disciplinary knowledge vs. professionally-relevant knowledge.

The reform of 1977 sparked off the development of didactics (*Didaktik*) in Sweden during the 1980s. The two major approaches of phenomenography and curriculum theory put the question of the "what"—the content of the teaching—at the center. These were responses to the seminarium tradition and the practical knowledge as well as the one-sided emphasis on methods (*metodik*) that neglected other necessary dimensions of professionally-relevant knowledge, such as the selection of content knowledge, the aims and goals of teaching, and the historical and social contexts, etc. Other strands of professionally-oriented research were teacher-thinking and the "teacher-as-researcher" movement inspired by, for example, British thinkers like Lawrence Stenhouse and by action research as developed by Wilfred Carr and Stephen Kemmis in their seminal book for education professionals, *Becoming Critical* (1986).

The Example of Curriculum Theory

One example of the expansion of education research is how curriculum research developed in relation to the national curriculum-making. Curriculum theory was an emerging research field in the 1970s. At the time, it was strongly influenced by the "new educational sociology" launched in England (Young, 1971). It was a strong response to the traditional and consensus-based functionalism of, for example, Robert Merton or Talcott Parson. Instead, by taking a critical stance on power, social control, and reproduction, it questioned how schooling was part of ideological sorting and subordination. Basil Bernstein and Pierre Bourdieu were two of the central figures along with Staf Callevaert, Daniel Kallos, and Ulf P. Lundgren in Sweden. The latter drew on the pioneering work of Urban Dahllöf's framework factor theoretical model of access to time as a boundary frame factor. Lundgren (1979) introduced the concept of the curriculum that gave it a meaning that included, but also exceeded, the curriculum as a document; that is, its social, philosophical, and historical premises.

There were a few wider social or epistemological issues raised, for example, concerning educational philosophy, in the formation of the early Swedish curricula for compulsory schooling in Lgr 62 and Lgr 69 (*Läroplaner för grundskolan*). They were rather characterized by a taken-for-granted essentialism, especially with regard to their knowledge view. For the low- and middle-school curricula, the Dewey-inspired progressivist elements were prominent (Englund, 2005/1986). A certain shift from essentialism to progressivism can also be discerned from Lgr 62 to Lgr 69 through the shift from "social education" to "individual development" and the later curriculum's emphasis on the gender-role issue.

In the 1960s, both curricula were scientifically legitimized by reference to subject experts and educational psychologists. During the 1970s, a new theoretical

discourse emerged, influenced by the new sociology of education that challenged the dominant traditional essentialism. The preparation for the Lgr 80 curriculum had strong features involving a greater awareness of the curriculum as an ideological document with an open curriculum debate organized by the National School Board. In educational philosophical terms, both in the pre- and post-work, as well as in the final curriculum framework in 1980, Lgr 80 (*Läroplan for grundskolan*)—despite party-political contradictions—, the new curriculum showed strong elements of reconstructivism and deliberative citizen participation, as shown by Englund (2005/1986).

The Example of Large-Scale Assessment Surveys

Another example of an educational research strand emerging at the time was the psychologically-oriented measurement of student achievement. From the start, the approach had a clear policy blend. It drew clearly on the established paradigm of test psychology. The International Association for the Evaluation of Educational Achievement (IEA) was founded in 1958 by a group of researchers who wanted to use "the world as an educational laboratory" (Nordin & Sundberg, 2014, p.18). One of these researchers was Torsten Husén, who was also Chairperson of the organization for many years. Until 1990, the IEA headquarters was in Stockholm. The first study, which examined mathematics, was completed in 1964 and became a great success. The next study was the very comprehensive "Six Subject Survey," which was carried out from 1970–1971 and the analysis and reporting took almost 10 years. Another couple of studies on comprehensive mathematics and science were conducted during the 1980s.

During the 1950s and 1960s, Benjamin Bloom had worked to develop scientifically-based progression taxonomies for student learning in order to classify the outcomes in this way. However, Bloom's idea was primarily analytical, not application-oriented. Policy-makers immediately saw the opportunity to prescribe what teachers should teach in the classroom. Even if the taxonomies did not directly result in any major changes in teachers' daily teaching practices, Bloom's influence gained traction through his participation as an expert at the IEA in the construction of the first large-scale measurement of pupils' school performance. The Institute of International Education at Stockholm University had an extensive international network among academics and policy-makers, but its domestic position was not prominent. Bloom's pathbreaking study from Bloom, 1956, the "Taxonomy of Educational Objectives" had a huge influence at the time. But what this example shows is that it played its role as a type of general enlightenment for policy-makers and professionals, not as a blue-print for evaluation and assessment in national contexts. Eventually, it has come to play the role of a leading guide to testing and evaluation, curriculum development, and teaching and teacher education. In fact, in the current evidence movement, it has experienced a come-back as the source of "hard science" in the era of performative accountability.

Under the reform phase of educational expansion, the interplay between education researchers and policy-makers was frequent and, increasingly, sectoral research grew strong. However, as the two very different examples illustrate, educational research was not commissioned by policy-makers in a strict sense. Policy-makers and authorities designated the frames and the researchers addressed issues and problems linked to policy problems; that is, they reframed policy issues (Lundgren, 2002).

Education Research and Educational Restructuring (1990–2010)

At the turn of the 1990s, major ideological–political and cultural shifts took place in Sweden. One could say that the old, uncontested social-democratic welfare model (old public governance) started to be questioned and a new neoliberal competition-based model (new public management) emerged. This shift has had profound consequences for the interplay between education research, education politics, and the pedagogical professions. In this neoliberal accountability paradigm, the customer has become the node, and various institutions organized around customer choice in the free market were redefined as service providers. The systemic restructuring reforms of the 1990s were part of an international right-wing trend, but this was extensive in Sweden, which, for example, had a very fast-growing proportion of public-funded private primary and secondary schools (Englund, 2006; Lundgren, 2002). Neo-liberalism has its normative and value bases in another ideology and incorporates a perspective on human life that differs from that of social-democratic states. It primarily regards men and women as clients or consumers, and not as citizens.

A series of system reforms were carried out in the direction of an education market with independent schools, the main staff being relocated to the municipalities with the decentralization of decision-making shifted to the local level (called restructuring reforms). The reforms were motivated by references to the emerging information and knowledge society, where lifelong learning and self-regulated flexible learning became a guiding principle. The idea of education as a public good was challenged by the private value of education. The "contract" involving expert-based policy-makers and researchers in state interventions and trial periods (*försöksverksamheter*) was shaken to the core. The arena for the interplay between educational researchers and policy-makers was re-configured quite radically. Two different and divergent trends are worth noting. One is the qualitative turn and the return of grand theories in education discourses and the other is the pluralization of influences linked to system reforms.

New theoretical horizons were opened up, which also brought new methodological advancements in the social sciences. Quentin Skinner edited a volume named *The Return of Grand Theory in Human Sciences* (Skinner, 1985). In this book, we

find chapters about many of the most influential social theorists of the time (Gadamer, Kuhn, Derrida, Habermas, Rawls, Foucault, Althusser, and Levi-Strauss). In retrospect, regarding the significance of such scholars (adding Bourdieu, Giddens, and Rorty) and this period being called "the age of the golden generation of twentieth-century European social theory" (Baert & Silva, 2010, p. 286), this generation played a significant role for the social sciences toward the end of the twentieth century and set "the agenda for what is to be studied" (Baert & Silva, 2010, p. 287). Even if it is misleading to talk about social theory in the singular, the trend represents a way of theorizing and conceptualizing that which was rehabilitated.

Institutionally, concerning the new plurality of education research in the 1990s, the *Pedagogik* discipline was challenged when teacher education relocated to the university sector. In 1997, the Swedish government appointed a parliamentary committee to come up with proposals for a renewal of teacher education. The committee proposed, among other things, a research strategy for teacher education and pedagogical work (SOU, 1999:63). The transitions of research foci and the approaches during the 1990s changed these into what can be called a multi-paradigmatic state. One example relates to interdisciplinary research development. The state commissions presented other possibilities for research in connection with school subjects and/or academic disciplines and new disciplines such as pedagogical work, knowledge production and learning, and special education. They underlined the connections between interdisciplinary research areas and the academic disciplines involved in teacher education. They also pointed to didactics (both subject and general) as another basis for doctoral studies. All disciplines involved in undergraduate teacher education were also to carry out research and postgraduate teaching. The parliamentarians suggested that a new faculty should be established: the sciences of education faculty. The commission compared this proposal for a new faculty with the existing faculties of medicine, technology, and other faculties with a direct focus on vocational and professional training. Higher education continued to expand, partly through a regional policy discussion and partly through a broadening of the range of activities and programs in the universities and colleges. At the same time, the differentiation was regulated by national controls and evaluations of professional educational programs and courses.

In the 1990s and early 2000s, many policy initiatives were implemented primarily for the purpose of creating what was assumed to be the right conditions for research-based schooling (Adolfsson, Forsberg, & Sundberg, 2019). The policy solutions thus included strategies and activities based mainly on the diffusion of empirical research within the education sector and on educating teachers in line with research-based teacher education. The means used by the policies, however, were mainly indirect and distant from the core practices of teaching and learning in schools. The initiatives also created a national discussion on the supply of educational knowledge that was useful for policy-makers and for professionals in schools. Many of the new didactics and professionally-relevant research strands involved qualitative research and drew on constructivist approaches to learning. Criticism was raised on the legitimacy of pedagogical research as being too abstract and theoretical on the one hand, and too local and unspecified as well as ideologically-biased

on the other hand. Core ideas during the 1990s, such as "teachers as reflective practitioners," were gradually challenged as new ideas of evidence on what really works emerged at the turn to the 2010s in Sweden.

Education Research and Performative Accountability (2010–)

A Global Idea on Best Practice Enters Swedish Policy-Making

From the end of the 2000s and during the 2010s, a new reform phase with major educational policy changes was taking place. An increasing number of international players occupied central positions in policy arenas where former nation states had owned the issues. As production moved from industries to increasingly knowledge- and information-based services, education and schooling issues took a more advanced position in comparison between countries' educational levels. Not least because of the economic competition, and more open and easily accessible education statistics, international knowledge surveys such as the Programme for International Student Assessment (PISA) surveys—with ranking lists for universities and with universities contributing to making comparisons a driving force for education policy—, a knowledge arms race began.

Transnational comparisons, along with the borrowing and lending of education policies, are increasingly setting the rules for and are used for legitimizing new reforms nationally. In the field of education, new reforms are, to a large extent, justified on the basis of references to other countries' school performances. In Sweden, the disappointing 2007 PISA results led to new strategies for reforming schooling, as the previous "silent import" of policy ideas was replaced by externalization and explicit references to the Organisation for Economic Co-operation and Development (OECD) and other international policy actors (Ringarp & Waldow, 2016). The OECD report "Improving Schooling in Sweden" (OECD, 2015) is a significant example of this and was openly commissioned by the Swedish government for guidance on how to improve the education system. The opening section of the report has the telling title: "A School System in Need of Urgent Change." The final section ends with four recommended policy actions for policy-makers to strengthen accountability for improvements. The means that are used for transnational actors to influence national education policy-making are primarily (i) to provide and disseminate specific research results that could be used for national evidence-based policy-making; (ii) to make comparisons based on evaluations and specific indicators (for example PISA studies in the OECD and the open method of coordination within the European Community); and (iii) to present best practices by benchmarking.

The international comparisons start waves of policy learning (or so-called policy transfers) with solutions that travel between countries (Nordin & Sundberg, 2014). International standards and indicators have an increasing impact on national and local education policy. But in parallel with a globalized education policy, there is

also a re-centralization in Swedish education policy, not least of all with the 2010–2011 reforms regarding the curricula and a new school law. Through, among other things, a strengthened state school inspection system, a centrally-prescribed curriculum, and more national tests, the state has reinstated a number of steering instruments that had previously existed at the local level. The guiding motive was to clarify the school's mission and to create better conditions for increased equality.

Education policy has been in interaction with research in the field since the post-war period, as we have seen. In the large, expansive stages of the education system's development, educational and educational science research have contributed to extensive parliamentary investigations. Education policy and practice, built on the idea of a scientific basis for schools (*skola på vetenskaplig grund*), have been a guiding principle in Swedish policy-making, loudly declared by politicians. However, along with increased transnational influences and new outlooks on education, the concept and notion of evidence have been redefined and reframed. Not least of which, with reference to the increased knowledge mass, new circuits of knowledge, data, indicators, and increasingly digitally-available information on learning, new conditions for the production, dissemination, and use of educational evidence and knowledge have been created. Consequently, the interaction between research, policy-making, and educational practice has been redesigned and educational knowledge reformulated.

Several policy initiatives are characterized by an increasingly active and ambitious drive to produce direct changes in teacher education, school and teaching practices, and to extend student performance at school (Adolfsson et al., 2019). In addition, initiatives are becoming even more focused on pre-formulated targets relating to the actual effects and outcomes that the policies are intended to accomplish. A kind of ecological rationality that was a prominent presumption in the policy materials in the 1990s is increasingly being challenged by a more technical rationality, which is less and less about "hoping it will happen" and more and more about "making it happen" (Adolfsson & Sundberg, 2018). In the 2010s, the initiatives thus became more focused and ambitious in order to bring about immediate changes in the teacher's teaching. We can see that the role of the educational researchers has also been redefined in the present regime of performative accountability. The expectations have been raised to provide actions, rules, and prescriptions for successful improvement, which equals goal attainment and measurable results.

Consequently, a general trend in education research is a return to empirical studies of students and their learning, "a new empiricism," and a letting go of theoretical concerns. This is a broad trend, with many exceptions, but one which nonetheless can be felt in the bones of any young scholar entering graduate school with the hopes of "writing theory." The policy imperative of today is to find out "what works" so that student performances can be improved. The theoretical part is generally considered as a detour that makes the knowledge production too complicated and too slow. The well-known state commission tradition (*utredningsväsende*) with parliamentary committees with long trial periods in the Nordic model of education has

been significantly replaced in Sweden by one-person commissions adjusting to the contemporary fast language of policy-making (Lundahl & Waldow, 2009).

As a general contemporary trend, the time speaks for quantitative research on teaching and learning, so-called impact research, where the interest is directed at school efficiency, teaching efficiency, or teacher efficiency. This approach is welcomed in policy settings as the results can be presented visually in numbers and graphs. Through its uniform way of describing outcomes, usually via study performance calculations (Cohen's *d* or *d*), the findings are based on mean differences regarding the effects of different types of influence factors or efforts on the students. Researchers using these methods have, over time, developed rules of thumb for interpreting the sizes of the studied effects. But as the old claims of objectivity have been discredited, the educational researcher is caught in the dilemma of contributing to educational policy-making with relevant evidence yet producing knowledge independently of policy pressures, and not necessarily subsuming to current notions of what counts as evidence in education.

The "New" Production of Evidence in Education

The idea that the school system, its policy, and practice can be grounded on evidence and research knowledge is not new, as we have seen. However, the interplay between researchers, professionals, and policy-makers is changing. While the science-policy contract in the era of rational planning was guided by expert knowledge including what problems needed to be addressed, alternative solutions and implementation strategies that were tested over long-term trial periods—the idea of "holistic rationalism" (Lindesjö and Lundgren 2000)—, this interaction is much more specialized, or even fragmented today. The Anglo-Saxon evidence movement defines evidence primarily as synthesized knowledge on impact factors on specific issues and questions (Tripney, Kenny, & Gough, 2014). This knowledge is presented in reviews and updated when new results appear within the field.

Internationally, a rich variety of intermediaries—that is, actors whose task it is to disseminate and mediate research and evidence to various target groups—has emerged. These actors range from established organizations and networks to government authorities whose mandate includes dissemination. The purpose of these evidence-brokering organizations is usually to identify relevant primary studies, to systematically scrutinize the quality of such studies by applying explicit criteria, and, finally, to summarize and synthesize the results. The goal is to inform as well as to instruct various interested parties (those active in the field, decision-makers, researchers) and the public as to what is known within various areas and where knowledge is lacking, and thus provide knowledge to improve and reform the school system (Foss Hansen, 2014). Broker organizations such as the Cochrane Collaboration, the What Works Clearinghouse, and the Campbell Collaboration consequently build on randomized control tests and quasi-experimental approaches. Others have included qualitative methods and studies.

As an example of the new production of evidence, the Swedish Institute for Educational Research (SIER) is significant. The agency, which was established 2015, has a specific state commission to compile and distribute evidence-based knowledge to professionals in Swedish schools. The overarching aim is to contribute to research-informed teaching and to increase student achievement. In policy terms, the establishment of the SIER was legitimized following deteriorating school performances as assessed by large-scale assessment data. Questions were also raised regarding the quality of educational research. It was considered non-cumulative, non-transparent, and methodologically flawed. Above all, it was seen as non-responsive to "what works" and to the professional need for guidance (Adolfsson et al., 2019). The relevance issue was accompanied by dissatisfaction with the large amount of small-scale qualitative research that was undertaken, a lack of research syntheses, the way in which research was disseminated, and the overall (non)use of research. In both Swedish policy and media, a change and improvements in educational practice and research and their interplay were called for.

As educational researchers are consulted in SIER research reviews due to their expert knowledge, their role is reduced to reviewing the quality and relevance of pre-defined questions. The formalized production process of SIER reviews implies a kind of bypassing of the research community. That is, the question regarding what should count as a relevant, useful, and legitimate research review is put into the hands of an administrative authority. The new configurations of interplays between educational researchers, policy-makers, and professionals are increasingly nested in boundary-crossings within formal and informal networks. Educational researchers are inflicted with the role of being consultants for policy-makers (Tveit & Lundahl, 2018).

The new production of evidence in education is guided by an empiricism that we can recognize from the history of education reforms in Sweden. The framing of research evidence is reduced to an a-theoretical language of educational knowledge that represents clinical research based in the logics of calculation and applicability, similar to what we can find in the medicine sector. This notion of evidence requires restricted review questions, statistical generalizations, and a cause–effect logic in contrast to conceptualizations, values, contextualizations, and understandings. Thus, it represents a specialized and applied rationalism rather than the former holistic rationalism of education reforms. In order to deliver evidence in a fast, visual, and volatile policy world, educational research is assessed at face value and by its direct usefulness, by its answers to ready-formulated policy questions.

The Future of Education Research in an Era of Evidence-Based Education

In conclusion, this chapter has identified some clear shifts in reforming education in Sweden relating to how research evidence has been framed and defined in some major knowledge traditions. Educational research, for a long *Pedagogik* period, has, during its centennial history as a discipline and research field in Swedish higher education institutions (HEIs), undergone major changes and is configured in a dynamic interaction with nearby areas in new formations. Today, the educational knowledge area is one of the largest within higher education in Sweden, the research is well established at almost every Swedish educational institution, and the number of professors has increased greatly. The area of knowledge has moved in one multi-disciplinary direction and is today characterized by a disciplinary plurality and as being in "a multi-paradigmatic state" (Lindberg, 2002; Sundberg, 2007).

Nowadays, the field comprises several disciplines/subjects (pedagogy, didactics, educational work, educational science, and the sociology of education, etc.) as well as many different prefix variants (e.g., special needs education) and specializations (e.g., subject didactics with a focus on Swedish). The development reflects a general expansion and increasing differentiation toward new specialist areas. Academic cultures and disciplinary knowledge are also characterized by structural differences related to phenomena such as globalization, massification, regulation, marketization, efficiency, fragmentation, and technology (Becher & Trowler, 2001). Fragmentation has created a development where communication between different research communities and theoretical approaches has been made more difficult. Requirements for internationalization, quality, relevance, and excellence have also affected both the academy as a whole and the work of researchers and teachers, not least in terms of quick deliveries on output that receives international credit.

Despite the disparate development of the different research strands in education, the current reconfiguration of the interplay between education researchers and policy-makers is surprisingly univocal. The most influential kinds of evidence entering policy domains in Swedish education are statistical calculations on what works. One conclusion based on the historical outlook on education research presented here is that the fragmentation and lack of disciplinary infrastructure on educational knowledge have enabled governments and policy actors to provide definitions and conceptualizations on what is useful knowledge for policy-making and for professional practice. This is clearly narrowing the scope for educational knowledge and the scope of evidence.

The impact of John Hatties' meta-analyses in Swedish policy-making is a remarkable example of the policy praxis of "cherry-picking" favorable results according to the policy agenda. And clearly, the demand-side of the production of evidence (the kind of knowledge that policy-makers want) also has consequences on the supply-side of educational knowledge production. These trends, starting in the anglophone countries, also have structural effects in Sweden. Along with a narrow conceptualization and definition of evidence, pre-existing education research

produced by researchers in the academy is criticized in the political sphere and in the media (Lundahl & Serder, 2020). In the foreground is thus the question of relevance to policy-makers and professionals. Politicians do not get answers to their questions and teachers are not given clear guidance for their work. Critical voices also come from within the academy and then the primary focus is on quality and normativity. Fragmentation, a lack of cumulative studies, and methodologically flawed studies are usually emphasized as the problem (Forsberg & Sundberg, 2019). The critical voices belong to another epistemic discourse of relevance and quality rooted in a technical rationality that clearly challenges established modern assumptions on research-based knowledge:

> From this point of view, skepticism, doubt and questioning—constitutive for modern science and research—is perceived more and more as ineffective, a non-productive outcome of the academic discipline. Other concepts, i.e. usefulness, accountability, applicability, prognostic capacity, efficiency, power, impact of knowledge, evidence-based research, have gained importance (Keiner, 2011, pp. 159–160).

In the Swedish context, we can discern three positions in response to the new production of evidence in education (Forsberg & Sundberg, 2019). Advocates for the what-works agenda represent a "replacement position" in the discussions. Subjective, arbitrary judgments should be replaced with assured evidence. This position is usually represented by other sciences outside the pedagogical, such as, for example, neuroscience and the learning sciences that are more linked to psychology, political sciences and economics among the social sciences, and information technology among the technical sciences. The "rejection position" originates from the seminarium tradition and from the qualitative research camps within the educational sciences. Representatives dismiss the concept of evidence in education and the assumptions associated with the concept. All educational activities are contextual and any assumptions made regarding general-impact facts are misguided. A third position is "complementary," and representatives have started to rethink how the relationship between the theoretical and the empirical can be reformulated in a more fruitful way; for example, how could reconstructive, quantitative, and qualitative methods allow us to see different dimensions of the world, and what different means of justification are valid? Such questions address the issues of how to conceptualize education questions and phenomena.

Bringing Theory Back In

The present situation concerning the role of evidence in educational reforms is somewhat troublesome, as the chapter has shown. However, there are different positions available to potentially inform and substantiate the depth and breadth of knowledge into processes of policy-making. Let me end with a short plea for the need to bring theory back in, or to be more precise, to bring theorizing back in. The policy quest for clear-cut answers on what works in education is obviously based on

epistemic assumptions that do not measure up. Unsubstantiated claims tend to leave space for disappointments and new orientations. The historical record shows that "brute facts" and simple evidence based on statistical calculations need to be corrected by conceptualizations/inferences that take the complex relations of interactive factors into account and are guided by theory. John Searle distinguishes between brute facts and institutional facts, where the latter acknowledges generalizations, abstractions, selections, interpretations, constructs, categorizations, classifications, paradigms, languages, perceptual habits, and institutions as basic conditions for developing knowledge and producing evidence. As a consequence, there is no way of making any sharp distinction between theories and facts, interpretations, and evidence. It also seems impossible to compare such entities. We will always lack a theory-neutral language of observation. As soon as this post-empiricist view was formulated with enough precision and persuasive force by "the golden generation" (Baert and DaSalvia 2010, p. 286), the door opened up for a transformation of our understanding of theorizing. Conceptual analyses, general orientations, and post-factual interpretations became rehabilitated.

Robust evidence, in contrast to "simple correlational evidence," methodological empiricism, or "instrumental reason," requires that educational researchers as well as policy-makers and professionals start seeing themselves not as neutral observers, but as situated in discourses that are historically and politically embedded; that is, the bigger picture. The critique of the current mainstream science and of acquiring a reflexive understanding of evidence in education is a lesson that continuously needs to be re-learned post-1970s. However, ready-made grand theories can become bibles and law books that are used in un-reflective ways and thus become instrumental.

> The modern social sciences are characterized … by an extremely damaging division between theoretical and empirical knowledge. Something of a division of labour, as it were, has arisen between those who see themselves as theoreticians and those who view themselves as empiricists or empirical social researchers. As a result of this strict division of labour, these two groupings scarcely register each other's findings anymore (Joas & Knobl, 2009, p. 3).

According to Joas and Knobl (2009), the post-empiricist critique of scientism was correct, but the transformation of the theoretical in the second post-war period also actually never led to an abandonment of the fact-theory dualism—at least not in practice. There are thus two ways in which to instrumentalize educational knowledge and reify educational relations and phenomena. The first way is through a methodological empiricism of "what works," which involves a reduction of the empirical to matters of fact. The second subordinates the empirical under some intellectual conceptual framework. What I would argue for by bringing theory into the issue of evidence in educational reforms is to (re-)establish disciplinary norms for communities of scholars to draw inferences based on theory and empirical data, not as external (as in the traditional theory vs. data dualism), but as internal to one another; theorizing education as a matter of concern and not as a matter of fact (Sundberg, 2019). That includes asking: Evidence—for what, for whom, and under what conditions, and from what knowledge traditions? Seeing the bigger picture,

the question of evidence in education reforms needs to be re-thought based on a socio-political and historical awareness of how education questions, factors, variables, and topics are selected and framed, and what ends that might serve.

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Part III
Thematic Chapters

Chapter 7
Danish – and Nordic – School Policy: Its Anglo-American Connections and Influences

John Benedicto Krejsler and Lejf Moos

Abstract Since the 1990s, Danish - and Nordic - schools and education policy has been increasingly influenced by Anglo-American understandings of how to improve school and education. This was due to an interplay of influences: (1) postwar US economic and cultural dominance; (2) American led postwar transnational collaboration in Europe that gradually institutionalized into the OECD, the EU, the Bologna Process, and the IEA; (3) the hegemony of Anglo-American norms migrated from the realms of economics and geopolitics to school and education collaborations. This chapter explores five particularly influential themes of Anglo-American influence: (1) Human capital and rational choice theory impacted Danish schools and education policy as 'knowledge economy' and 'competition state' discourse raised the stakes. (2) The school effectiveness and improvement movement developed the ideas of 'knowledge that works' and school reform, which gained dominance in transnational policy collaborations. (3) The 'evidence' movement transformed policy conceptions of what works. (4) New Zealand and Ontario school reform policy impacted Danish schools due to their 'softer' low-stakes accountability approaches. English school policy chose a high-stakes accountability approach in education, which was influential in mediating 'new public management' and market-like approaches in education to Denmark. (5) The policies of the United States were agenda-setting for schools and education policy within the Anglo-American networks.

Keywords School policy · Denmark · Nordic dimension · Anglo-American influence · Transnational policy

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Introduction

Danish and Nordic school and education policy – like many other policy areas – is characterized by a clear Anglo-American influence. After World War II, the English language gained ever greater dominance globally as the new lingua franca. The United States took the lead in creating the institutional framework of the new order of Pax Americana (de Grazia, 2005). The NATO military alliance (1949), joined by Denmark, Iceland, and Norway, was designed to protect Europe from Soviet domination; the Bretton Woods institutions (1944), including the World Bank and the International Monetary Fund, defined a new economic world order; and Marshall Aid (1948), which set the agenda for emerging transatlantic cooperation between the United States and European nations, was joined by all Nordic countries except Finland (Oxenford, 2016). The Marshall Aid initiative in turn gradually became institutionalized in the form of the OECD and the European Union (Krejsler, 2018, 2020; Ydesen, 2019).

From the 1960s the coupling between economic growth and education has moved school and education higher up on the political agenda internationally and nationally in all Nordic countries, largely driven by human capital and rational choice theory. These two schools developed in the United States before subsequently spreading internationally (Elfert, 2019). Above all, it was the Chicago school of economics that was most influential. Its key figures included James S. Coleman (1926–95), Gary Becker (1930–2014), and Milton Friedman (1912–2006), as well as – more recently – James Heckman (1944–), who since around 2010 has made a big imprint on Danish and Nordic policy discussions about the importance of preschool and nursery school (Friedman, 1996; Nannestad, 2009).

Practitioners and analysts alike in Danish and Nordic schools and education research increasingly speak and write in English. We strive to publish and disseminate our research in anglophone journals – first and foremost American, British and Australian journals, but increasingly journals headquartered in other countries where, however, the language, form, and a large contingent of the editorial boards are still Anglo-American. The major publishing houses, such as Taylor & Francis, Sage, and Routledge, are primarily Anglo-American. The two giants, Springer and Elsevier, are, admittedly, German and Dutch respectively, but they operate largely in English and in accordance with Anglo-American norms and editorial board networks. This means that the norms and criteria for good research and publication are set overwhelmingly in terms of Anglo-American traditions.

In the field of Danish school policy, teacher education and educational research, since the 1990s we can clearly see a reversal from the 'continental' tradition, with reference to Germany and France in particular, toward Anglo-American traditions and language. Here English, New Zealand, and Ontario (Canada) school policies have been the most direct sources of inspiration for Danish school policy (fx Hattie, 2013; Levin, 2008; Rasmussen, Bayer, & Brodersen, 2010). This re-orientation in Danish school policy is difficult to understand without knowledge of the school effectiveness and improvement movement. This movement, largely

Anglo-American-dominated, gained a great deal of traction in transnational policy circles as well as at nation-state policy levels. It is oriented toward empirical research and has focused on international comparative studies (Slee, Weiner, & Tomlinson, 1998; Townsend, 2007). Most often – but not exclusively – the preferred studies have a strong quantitative focus, drawing on neopositivist and pragmatic approaches, often associated with evidence, behaviorism, and cognitive psychology approaches. Through the framework of the OECD and the IEA (the International Association for the Evaluation of Educational Achievement), the school effectiveness movement has been instrumental in promoting the trend in school and education policy and reform that we must promote 'evidence-based knowledge of what works.' The wave of 'evidence' and 'What Works' began in the field of medicine in England with Archie Cochrane's advocacy of randomized control trials, and became institutionalized in the 1990s in the international English-based Cochrane Collaboration (Hammersley, 2007, 2013). Something similar developed in the year 2000 in the fields of social work, criminology, and education with the institutionalization of the US-based Campbell Collaboration. The Campbell Collaboration was central when the 'What Works Clearinghouse' (WWC) was set up in the United States in 2002 on the basis of the 'No Child Left Behind Act' of 2001; the similar 'Evidence for Policy and Practice Information Co-ordinating Center' (EPPI) was set up in England; both serve as key sites where policy makers and practitioners can seek out knowledge of what works. The WWC and the EPPI were the main references when the 'Danish Clearinghouse for Educational Research' was established in 2006 (Krejsler, 2017).

While there is a growing literature in Denmark and the Nordic countries about Anglo-American and transnational influence on school reform and curriculum development in those countries (e.g. Hopmann, 2015; Moos, 2016; Uljens & Ylimaki, 2017), our understanding of how those ideas and trends developed is often distorted by a lack of understanding of the internal relationships within the Anglo-American-dominated networks. Thus it is remarkable how understated a role US policies have played in school policy reform and its associated research in Denmark and continental Europe, despite the United States' position as the dominant player in the global Anglo-American school and education networks (Krejsler, 2020). This is probably because American versions of standards-based education policy, high-stakes testing, and evidence discourse often have to be translated into 'softer' versions to make sense and become sufficiently digestible in Nordic and continental European contexts. That is why we see relatively more welfare-oriented anglophone players, like England, alongside smaller agenda-setting players such as Ontario, New Zealand, and Scotland take on this role. In this configuration, however, English education policy represents a 'harder' version of high-stakes accountability, more akin to US policy, whereas Ontario, New Zealand, and Scotland represent 'softer,' lower-stakes versions of accountability. Omission of the dominant actor, however, risks distorting our understanding of how global trends in school policy have evolved. Thus Danish and Nordic debates on school policy often take place on an under-informed basis, which creates a skewed and insufficient basis for reform

decisions. The development of agenda-setting PISA (the OECD's Programme for International Student Assessment) thus came about to a large extent following American pressure on the OECD (Tröhler, 2013); and the school policy shift toward 'evidence' and 'What Works' gained momentum with the OECD 's country report on Danish educational research, which had clear references to the What Works Clearinghouse in the US and the EPPI in England (Burns & Schuller, 2007; Krejsler, 2020; Lawn, 2013; OECD/CERI, 2004; Schuller, Jochems, Moos, & Zanten, 2006).

Human Capital and Rational Choice Theory

Strategies in Denmark and other Nordic countries for school and education, even for daycare facilities, are increasingly thought of in terms of their importance for economic growth in what we call knowledge economies. Here as well, inspiration is largely drawn from Anglo-American and, in particular, American sources. Since the 1960s, human capital and rational choice theory have had a major impact on economics, political science, sociology and, increasingly, educational science (de la Fuente & Ciccione, 2003; Korsgaard, Kristensen, & Jensen, 2017: chapter 8; Scott, 2000). These two overlapping approaches are particularly associated with the Chicago school of neoclassical economics.

The term 'human capital' is often associated with Gary Becker (1930–2014), an economist from the Chicago school and author of 'Human Capital' (Becker, 1964). His point of departure was that human capital, understood as intellectual, social, or affective capital, can be compared with other factors of production, such as machinery, factories, and capital. They too can be used to increase the prosperity of a country. This argument brings the attention to school and education as entities in which governments and societies invest large sums of money and which contribute to economic growth and innovation.

From this point of view, human capital theory has practical implications that can engage economists and policy makers faced with the task of prioritizing limited public resources. This is where human capital theory overlaps with rational choice theory in several respects. Both claim to be able to operationalize questions such as: How much does the choice of whether to take an education contribute to increasing a person's life income? If children with low socioeconomic status attend kindergarten, how does that contribute to their future life chances and life income? How can we aggregate individuals' preferences in relation to education and kindergarten in ways that enable us to understand better how to prioritize public initiatives and direct incentives to target groups in the most efficient ways (Friedman, 1996; Nannestad, 2009)? In the Danish context, James Heckman, Nobel laureate and economist of the Chicago school, was very influential in impacting discourse and policy on pre-school and nursery school. The 'Heckman curve,' expressing Heckman's conclusion that the return on each dollar invested is higher the earlier you invest it in education, was a key reference in the post-millennial reforms of Danish pre-school (Nielsen et al., 2017, p.3).

Rational choice theory views the individual as a *homo oeconomicus* (Pedersen & Collin, 2018; Scott, 2000). Following on from classical liberal and utilitarian traditions, the individual is seen as a rational calculating entity that seeks to optimize its self-interest. Rational choice theory conceptualizes social interaction in the image of the market and assumes that people are motivated by expected rewards, understood as the profit one can make.

Both human capital and rational choice theory developed in the United States and subsequently spread to Europe and Scandinavia, not least Norway. The School of Economics at the University of Chicago was particularly influential in molding the ideas that gave rise to neoliberal and 'new public management' reforms. One of its major concerns was to develop theory and models that can be operationalized into policy calculation models.

Economic impact assessments of policy proposals were developed in the Danish economic ministries based on computer calculation models such as ADAM (Annual Danish Aggregate Model), MAKRO, and DREAM (Danish Rational Economic Agents Model). These models are all based on rational choice notions of citizens' preferences in calculations of the effects of public initiatives and associated incentive structures. The implementation of governance paradigms in the public sector such as 'new public management' and 'new public governance' has also been permeated by this theoretical approach (Krejsler & Moos, 2016; Sahlin-Andersson, 2001). Overall, this will have a major impact on how school and education policy initiatives are conceptualized in the formulation of financial priorities and the resulting incentive policy such as the 'free school choice' and 'money per student' measures (Enhedslistens Økonomiske Sekretariat, 2018; Korsgaard et al., 2017: chapter 8; DREAM, 2021). The recommendations of the government's 'Productivity Commission' (2014) on the effects and utility of Danish educational investment are clearly indebted to human capital and rational choice theory.

This approach to theory refers to the 'competition state' in which the future of the nation state is closely linked to incentivizing each individual to optimizing him-/herself and his/her potential (Cerny & Evans, 1999). This approach has gathered huge traction in Denmark across the political aisles as a comprehensive way of understanding national identity in terms of being a part of the global knowledge economy (Pedersen, 2011). Bjarne Corydon, the influential minister of finance in the Social Democrat-led government from 2011–2015, took the term 'competition state' from the realm of political science and applied it directly as an empirical concept to understanding Denmark and the challenges to Denmark's position among the global knowledge economies (https://www.berlingske.dk/politik/derfor-bekender-corydon-sig-til-konkurrencestaten).

There has been much criticism of human capital and rational choice theory. Rational choice theory stands accused of being reductionist in relation to the diversity of people's differences, social interactions, and societies by reducing all social action to an expression of self-optimization by rationally calculating individuals (Green & Shapiro, 1994). This critique points out that people do not educate themselves merely in order to optimize their life income. It points to the lack of attention

these theories pay to values, morals, love, spirituality, and other phenomena that also affect how humans think, feel, and act.

School Effectiveness and Improvement

The school effectiveness movement dates back to the quantitative sociological input–output studies and economic studies in the functions of educational production of the 1960s and 1970s (Coleman et al., 1966; Hanushek, 1979). Many refer to the reactions to the controversial Coleman report of 1966 by James S. Coleman, the influential Chicago school sociologist, as the starting point. Coleman concluded that student outcomes were primarily influenced by students' socioeconomic and family backgrounds.. This research contributed to the political commitment in many anglophone countries, including the United States, to compensatory programs such as Head Start.

These conclusions, however, were strongly challenged by educational researchers, who were convinced that the quality of each school could actually lead to significant changes in student outcomes. The Effective Schools movement thus began to look for schools that make a difference regardless of socioeconomic background in order to identify the best practices that others can learn from. For example, the iconic 1979 study 'Fifteen Thousand Hours' concluded that student performance in colleges in the United Kingdom could be positively correlated with particular school characteristics (Rutter, Maughan, Mortimore, & Ouston, 1979). Since then, much school improvement research has focused on implementing the results of this research, with varying results, however. Over time, studies in school effectiveness, school improvement, and instructional effectiveness combined under the concept of school effectiveness.

This field of research is characterized by many methodological problems, as well as a marked lack of theoretical grounding. Nevertheless, within the movement, 'the five-factor model' gradually emerged, articulating the five traits characterizing schools that in the school effectiveness literature are correlated with positive student outcomes: (1) strong educational leadership; (2) high expectations for student outcomes; (3) focus on basic skills; (4) a safe and well-organized school environment; (5) regular evaluation of student progress (e.g. Scheerens, 2013; Scheerens & Creemers, 1989).

In the 1970s, this collaboration became institutionalized, not least through the 'International Congress for School Effectiveness and Improvement' (ICSEI) (www.icsei.net). ICSEI represents a spectrum of research paradigms, ranging from the more hard-core evidence-oriented school effectiveness research of the Campbell Collaboration along with similar approaches that focus on quantitative, experimental, and neopositivist approaches (e.g. Bert Creemers, Robert Boruch, and David Reynolds), to 'softer' school improvement approaches that also allow for more qualitatively oriented paradigms (e.g. Andy Hargreaves, Michael Fullan, Ben Levin, Viviane Robinson, and others). The ICSEI congress has gathered a considerable

following among Danish and Nordic school effectiveness researchers, as well as among university college representatives,[1] school leaders and policy makers.

Strong forces within the school effectiveness movement have greatly contributed, not least within the framework of the OECD and the IEA, to promoting the dominant trend in school and education policy and reforms that they must build on 'evidence' of 'what works.' Here, too, the inspiration primarily came from the United States and England, and was subsequently institutionalized and taken over by transnational bodies such as the OECD and by national policymakers in other countries. Among the better-known contributors to the movement's 'softer' school improvement wing, which has had a considerable impact in Denmark, one could mention Michael Fullan and Ben Levin from Ontario and Andy Hargreaves, born in England and resident in the United States, as well as Vivianne Robinson from New Zealand. Peter Mortimore, another school effectiveness advocate in the English educational context, was also a key figure in elaborating the seminal OECD country report of 2004 about the supposedly sorry state of evaluation culture in the Danish comprehensive school system. This report served as a lever for the introduction of ten national tests into a school system in which tests had hitherto been taboo, along with student personal achievement plans and quality reports by the local municipality to improve municipal oversight of schools (Ekholm, Mortimore, Maria, Laukkanen, & Valijarvi, 2004).

In Denmark, countless other examples are visible of how school effectiveness and improvement research has affected schools, school leadership, and teacher education policy: Dafolo as a publisher disseminates school effectiveness research to a Danish school public; the OECD 'Conference on Improving School Leadership' hosted by Danish Ministry of Education (April 14–15, 2008); PhD initiatives in relation to qualify university college teaching staff; dissemination of notions about 'learning-goal management' (i.e. standards-based education curricula); the Danish Evaluation Institute (EVA) are just a few (e.g.Hattie, 2013; Robinson, 2018; Skolens Rejsehold, 2010; Dafolo, 2021; www.eva.dk/).

'Evidence' and 'What Works'

Since the 1990s, then, Danish schools, teacher education, and educational research have been greatly influenced by the discourse of 'evidence,' understood as the production of 'knowledge that works' (Krejsler, 2013). This has led to a significant turn toward empirical studies, often based on large quantitative and international comparative studies. This development also has its roots in Anglo-American contexts, with the United States as the leading actor and English education policy as a significant contributor. Thus in 2004 a central OECD country report was published on the

[1] In Denmark a university college offers profession specific tertiary education and diploma courses (e.g. teachers, social workers and nurses).

quality of Danish educational research and development (R&D) (OECD/CERI, 2004), with direct references to the American What Works Clearinghouse (WWC) and the UK's Evidence for Policy and Practice Information Co-ordinating Center (EPPI). The report was used as significant leverage for launching the Danish Clearinghouse for Educational Research (2006). This was one of many initiatives that contributed to changing the nature of the educational research receiving political attention.

As mentioned in the introduction, the evidence wave began in the medical field with the British physician Archie Cochrane (1909–1988) (Cochrane, 1972; Rieper & Hansen, 2007). Denmark was an early participant in the Cochrane Collaboration, founded in 1993, and in the same year established a Nordic Cochrane Center (Nordic Cochrane, 2021). Cochrane's initiative emphasized a neopositivist-inspired way of doing science: one that privileges experimental randomized quantitative studies looking for generalizable correlations between cause and effect.

The Cochrane Collaboration also inspired the establishment of the Campbell Collaboration in its quest to make social welfare, crime and education as evidence-based as medicine (Campbell Collaboration, 2021). Here, too, reference was made to the massive waste of public tax resources resulting from the fact that much social policy practice was based on methods for whose success there is no evidence. Here too, Denmark was quick to join. In 2002 the Nordic Campbell Center at the Social Research Institute (SFI) was established, later re-named VIVE-Campbell (VIVE Campbell, 2021).

Within the fields of schools policy and education, from around the mid-1990s the establishment of the evidence movement became increasingly linked with the OECD's growing interest in research in education. Not least under US pressure in the late 1980s and 1990s, preparations for PISA were under way following work on the development of 'Indicators for Education Systems' (INES) and the resulting annual 'Education at a Glance' flagship publications comparing member states' investments, results, and performance on a statistical basis (Tröhler, 2013; Ydesen, 2019). The focus was on improving the role and effectiveness of educational research as a basis for policy decisions and for practitioners' ongoing work on improving practice in educational institutions. The evidence movement and its approach to creating generalizable knowledge of what works in relation to the costly public-sector areas of health, social welfare, and education thus became very convenient at a time when national governments and transnational organizations were increasingly turning their attention to Anglo-American-inspired discourse on competitive knowledge economies and 'new public management' as well as lifelong learning agendas. Within the education and social welfare sectors, the evidence discourse has largely been guided by agendas from external stakeholders, not least policymakers and both national and municipal managers (Christensen & Krejsler, 2015; Christoffersen & Petersen, 2019).

As the evidence movement developed in England and the United States in particular, its ideas and practices have required adaptation in the encounter with Danish and Nordic contexts, where other and more qualitatively oriented traditions were already dominant within educational research. Thus in the Danish and Nordic

context there is no broad tradition of conducting randomized controlled trial experiments and systematic reviews on the basis of neopositivist methodology in educational research, as is the case in the United States. Therefore, we also see that broader approaches to evidence are preferred in Denmark and other Nordic countries (Rieper & Hansen, 2007). Approaches based on systematic reviews of large volumes of more diverse primary studies, such as those conducted by John Hattie from New Zealand under the badge of 'visible learning,' have therefore achieved considerable success in Nordic contexts. Here there is more room for professional judgment in relation to the specific contexts, which is considered crucial when such knowledge is to be implemented (Hattie, 2009, 2013). This point is supported by the strong German tradition, represented by Hilbert Meyer and Andreas Helmke, who elaborate more inclusive narrative syntheses of what the wider educational research says about what works. These researchers' work has attained widespread use in a Danish context via the publisher Dafolo (Helmke et al., 2008; Meyer, 2004). Hilbert Meyer concludes that research on what characterizes good teaching shows consensus on the following points: it is well structured; the teacher knows his/her subject; methods cannot be chosen independently of context; and teaching that works takes into account individual differences and learning needs among the students. Syntheses of the latter kind have been criticized for being so general that they do not provide much guidance and direction for teachers; the counter-argument is that the context-dependent 'nature' of most problems related to education and teaching means that one must speak in general terms when one wants to say something at a context-independent level.

Nonetheless, we see that American concepts that claim to be evidence-based – such as the Incredible Years (DUÅ) and PALS (Positive Behavior in Learning and Interaction [= PBIS Positive Behavioral Interventions and Supports]), which are predominantly based on cognitive and positive psychology as well as behaviorism – are spreading and are coming to be used increasingly widely (not least in daycare facilities), disseminated by the National Board of Social Services (Aabro, 2016). Simultaneously, we see that several Scandinavian evidence concepts, such as the 'LP model'(Learning Environment and Educational Analysis) translate evidence into something that resonates in Scandinavian contexts by using systemic approaches (e.g. Niklas Luhmann's systems theory) that focus less on the individual than American concepts do, and more on dynamic interaction within the group and throughout the school context.

Inspiration from the Anglophone Powers: England, New Zealand and Ontario

After the internationally inspired school and teacher education reforms began to gain momentum in Denmark during the 1990s, five countries in particular emerged as sources of inspiration. These were England from the 'harder' group of

high-stakes accountability countries, and New Zealand and Ontario (Canada) from the 'softer' and lower-stakes accountability group of more welfare-oriented anglophone countries, but also included Finland and Singapore. Groups of Danish school policymakers, school principals, and students from university colleges have made study visits to these countries to meet colleagues there as well as making school visits. Over the years, these developments have left traces in the schools debate, in the daily press, in the teachers' union magazine 'Folkeskolen,' in the schools management magazine 'School of Tomorrow,' and in an array of publications not least from the publisher Dafolo. All of this has contributed significantly to driving the schools reform debate (e.g. Andersen, 2007; Olsen, 1996; Schmidt, 1999). In relation to teacher education reform, Ontario, Finland, and Singapore emerged as the model countries to which Denmark is explicitly compared, following the government's '360-degree service review' of Danish comprehensive school (Rasmussen et al., 2010). Finland and Singapore – non-anglophone countries – have in several respects come to the fore of the debate because they again and again top the transnational surveys and comparisons that are based predominantly on Anglo-American-inspired understandings and criteria. Unsurprisingly, the experience of Finland attracts special interest in Denmark, as Finland is a closely related Nordic country. Previously, Finnish school had been regarded as standing in the shadow of the progressive school systems of Sweden and Denmark (Andersen, 2007; Sahlberg, 2011). Singapore has been of particular interest because of its status as front-runner among the East Asian 'tiger economies' that Western economies are increasingly fearful of falling behind. These East Asian countries have attracted some envy, as they seem to succeed in achieving top school performance in societies with persistently high economic growth through strong school discipline and a continuous focus on testing (Christensen, 2019; Simonds, 2018).

Nevertheless, it is important to maintain the focus on the anglophone countries, because it is above all from here that the ideas and criteria come for what counts as valuable school reform. Here England, New Zealand, and Ontario in particular are the countries that since the 1990s have most directly inspired much Danish thinking about school reform. Worth mentioning are: free school choice; increased parental (consumer) influence; focus on basic knowledge and skills; the introduction of a national curriculum, within a goal-directed (aka standards-based) school; decentralized schools management committed to results; and the increasing awareness of testing. The turn toward 'goal-directed learning' and the 'goal-directed school' can hardly be understood without reference to the above-mentioned anglophone countries, even if the particular Danish translations of these inspirations indicate that one cannot talk of transfers in a direct sense (Steiner-Khamsi, 2012).

England: The Centrally Run Model for Market-Oriented Schools

When, starting in the 1990s, Danish schools embarked on reforms toward marketization and increased exposure to competition in order to make school more effective, English education policy played a leading role in inspiring thinking in which school is seen as a corporation in the marketplace. Here, a school's production or output was to be measured and assessed in relation to its ability to meet national standards, which required the imposition of standardized documentation of student outcomes. The ideas came from 'new public management' and 'public choice' theory, both closely related to rational choice theory. Inspiration from the private sector and the market was supposedly needed to modernize a public sector that needed to achieve higher productivity and more efficiency for less tax money. More competition between schools was introduced, including free school choice. School management was decentralized to the individual school, where the power of the school leadership was strengthened and the influence of local educational authorities diminished as these were perceived by many to be overly guided by teachers' professional interests. The latter were increasingly staged by public choice arguments as contradictory to the interests of students and society (Hood, 1995; Sahlin-Andersson, 2001).

Neoliberal politics accompanied the reforms of Margaret Thatcher (1979–91), the conservative UK prime minister, and Ronald Reagan (1980–88), Republican president in the United States. Under the banner of Third Way politics and 'new public management,' reforms were rethought in a more welfare-oriented direction, championed by Tony Blair (1997–2007), New Labour UK prime minister, and Bill Clinton (1992–2000), US Democratic president. This development was to have a major impact on how the Danish Social Democrat-led government of Poul Nyrop Rasmussen (1993–2001) and the subsequent Liberal Conservative government of Anders Fogh Rasmussen (2001–2009) developed their ideas for reforming the welfare state, including schools and education (The Danish Government's Modernization Program, 2003). The Blair government relied heavily on evidence-based allocation of resources to costly public-sector fields like health, social welfare, and education. This meant that much attention was paid to institutions such as the EPPI at London University, which became a key inspiration when the Danish Clearinghouse for Educational Research was established in 2006 (Gillard, 2018). The idea was as follows: if public interventions can be based on scientifically proven knowledge of what works, then political priorities can allegedly be based on robust knowledge rather than subjective opinions or ideological educational trends. This would save taxpayers unnecessary costs and, simultaneously, procure the desired output from the investments made in public business.

With the adoption of the groundbreaking 'Education Reform Act' for England and Wales in 1988, a number of reforms were launched in English education policy, with the Conservatives and New Labour acting rather similarly, albeit often for different reasons. The Conservatives maintained a discursive focus on market solutions and free choice, whereas New Labour had a discursive focus on equality for all

(Chitty, 1991; Gillard, 2018; Whitty, 2000). The 'national curriculum' was introduced, with a focus on standards-based education. School students' skills in reading, mathematics, and science were increasingly tested. The Reform Act was heavily inspired by a scientific curriculum that fitted perfectly with standards-based education (Blossing, Imsen, & Moos, 2013; Hamilton, Stecher, & Yuan, 2008). The entire reform process was underpinned by tight interventionist accountability measures. Parallel to what was visible in the United States, this was a 'high-stakes' system in the sense that pressure (often punitive) administered 'top-down' was applied on school districts and schools to ensure that student performance in literacy, numeracy, and science in particular were improved. Student and school performance was measured, and ranked through comparisons.

These reform processes have been subject to severe criticism from teachers and educational researchers as dangerous developments for schools, for education, and for the common good. The authority of pedagogy, it is claimed, is now replaced by a one-sided focus on performance and productivity, as we know them from economics and the marketplace (Ball, 2012; Biesta, 2010; Hammersley, 2013; Slee et al., 1998).

Nevertheless, these developments have inspired Danish policy makers extensively since the turn of the millennium. They brought momentum to the launching of a string of reforms with a focus on transforming schools in the image of the marketplace. Target-and-frame control became the format for decentralizing more power to the individual schools in a form where the strategic leadership of the principal was strengthened at the expense of teaching professionals. This decentralization was offset by centralization in the form of a national standards-based and testing-oriented school policy in which student performance, and thereby also individual schools, were measured and made comparable through national tests and standards. The schools were also assessed through mandatory municipal quality reports, which made their performance comparable and visible nationwide (Moos, 2016; Rasmussen, Holm, & Rasch-Christensen, 2015).

New Zealand: Decentralized Marketization of Local School Development

Already from the 1990s onwards, Danish researchers, policy makers and practitioners began to turn their eyes on New Zealand and go for study trips there (Olsen, 1996; Schmidt, 1999). This happened in the wake of Prime Minister David Lange's fourth Labour government of 1984, which launched a wave of market liberalizations in New Zealand that also hit the country's education system. The school system was increasingly conceived of in terms of an education economy in which each 'opportunity cost' must be weighed against what investments elsewhere might have produced in terms of dividend (Tearney, 2016). Pupils were portrayed as consumers, the government as an investor, and schools as providers representing special

interests. The school system was decentralized to a 'free school market' according to a target-and-frame control accountability format, and simultaneously re-centralized in the sense that school boards and teachers became responsible for their performance in relation to the centrally formulated 'Guidelines for School Administration'.

The 1993 'New Zealand Curriculum Framework' transformed the curriculum from a detailed content-focused input curriculum into an overall output-oriented curriculum focusing on what students need to succeed in becoming responsible citizens. The 'Education (National Standards) Amendment Act' of 2010 ensures that all students regularly take reading and math tests, which must be measured against national standards that allow each student to progress. In 2006, the 'Practicing Teacher Criteria' were introduced, requiring every teacher to provide their school principal with a teacher portfolio every 3 years to document that they are living up to the professional standards that allow them to continue teaching (Tearney, 2016).

It is this comprehensive framework that has produced the notion of the 'New Zealand model,' which since the 1990s has inspired Danish school development. The model is marketized with a strong focus on: high expectations for all children based on the child's potential; academic progression; learning-goal-directed teaching; visible learning and inclusion. The model focuses on schools-based development according to a model in which overall national goals are supposed to give way to local innovation, based on professional knowledge of what works (Olsen, 1996). At the same time, the model has been criticized for being too embedded in Anglo-American market thinking, an approach that collides with fundamental values of a social democratic and social liberal nature in a Nordic context (Schmidt, 1999). Nevertheless, with its focus on space for decentralized authority and the individual school's opportunity to develop its own pedagogy, the model serves as a parallel to central aspects of Danish school culture whose ancestry can be traced back to nineteenth century reformers like Grundtvig, Kold, and reform pedagogy. In Danish adaptations of Anglo-American inspirations, this appeals more than English and American versions, dominated as they are by 'top-down' and 'high-stakes' accountability measures that offer professionals significantly less room.

Not surprisingly, it is also in New Zealand that influential school effectiveness thinkers of the 'softer' variety have been produced. In particular, John Hattie, with his concept of 'visible learning,' has had considerable influence in relation to contemporary Danish – and Nordic – school reform and development (Hattie, 2013). Hattie's thinking about evidence and knowledge that works has in several respects been framed to make room for local interpretations in local schools-based development contexts. Nonetheless, the pervasive Anglo-American neopositivist and quantitative approaches to educational research often blend badly with a Nordic didactics-oriented pedagogy and thinking (Larsen et al., 2017). One could also mention the influential school leadership researcher Viviane Robinson and her thinking about student-centered school leadership and problem-based methodology. Robinson conceptualizes school leadership in the light of professional learning communities as they have emerged in New Zealand. This has resonated well, in

many ways, with the requirements and traditions in Danish school and professional contexts (Robinson, 2015, 2018).

Ontario (Canada)*:* Partnership Between Ministry and Schools

From around 2011 to 2016, it was Ontario's turn to become the major source of inspiration for Danish school reform. Educational researchers, policymakers and school practitioners left Danish shores in droves on inspirational trips to the Canadian province (Hansen, 2015). The starting point was that around the year 2000, Ontario's school system was characterized by poor performance, low prestige in the population, and consequently harsh and persistent criticism of teachers (Anderson & Ben Jaafar, 2003). In 2003, Dalton McGuinty from the Liberal Party became prime minister in Ontario on a promise to re-establish the province's school and education system. He drew on two prominent school effectiveness researchers, Michael Fullan and Ben Levin of the 'Ontario Institute for Studies in Education' (OISE), as close advisors to devise a so-called 'whole system reform' of the school discourse and practice. This discourse claimed to provide simple and easily transparent goals for schools in Ontario and to produce an optimal model for reforming school by focusing on the following: setting high expectations for all pupils as a way of lifting even academically weak pupils; ensuring that differences in outcomes for students from affluent and less affluent families are reduced; and creating respect for schools and their teachers that for a long time had been the object of criticism (Fullan & Levin, 2009; Levin, 2007, 2008). Virtually the same goals appeared in the public school reform paper put forward in 2013 by Christine Antorini, minister of education, and the Social Democrat-led coalition government, with explicit reference to Ontario (The Danish Ministry of Education, 2013).

In the Ontario discourse, the same main foci are employed as in England, but the interventionist accountability approach is dropped. Instead, this approach claims to build trust-based partnerships with the province's many schools and school districts and on launching a 'whole system reform'. In terms of evidence and what works approaches, this learning communities approach drew plenty of inspiration from John Hattie's research on visible learning and feedback in the ways in which they aim to develop school culture and teaching in order to develop ever-better teaching practices (Hattie, 2013).

In an Anglo-American context, Ontario profiled itself against the simultaneous unfolding of the No Child Left Behind Act of 2001 in the United States. Where in the United States, just as in English education policy a number of high-stakes accountability measures were implemented, with a heavier focus on punishment than on rewards and primarily emphasizing a 'top-down' approach to school reforms, apparently the opposite approach was chosen in Ontario. Fullan and Levin emphasize a discourse about developing trust among professional teachers and principals. According to this discourse teachers must become qualified to practice a

data-driven development which over time will ensure better outcomes for Ontario's students, based on evidence and knowledge of what works (Fullan & Levin, 2009).

And here it becomes apparent that what inspires many of the Danish visitors to Ontario is the pronounced focus on 'collective capacity building' – in the form of developing and trusting teacher teams and learning communities as well as the broad interpretation of how to think data-driven development. Many Danish visitors are surprised how much teaching in Ontario seems to be guided by problem-based project work, whereas the Canadians have on several occasions explicitly referred to the inspiration from Denmark and Scandinavia (Hansen, 2015). We see, nonetheless, a difference between Danish policymakers who use discourse from Ontario to launch a controversial school reform top-down, and practitioners who have been inspired by actual practice and more trusting relationships among stakeholders.

In total, we see here three distinct models for school reform and development. There is (1) a more centralized English policy version, in which top-down and high-stakes accountability measures enforce reforms that fundamentally change the school system. A second is (2) a highly decentralized New Zealand version, in which a leaner ministry of education proposes a different version of Anglo-American-inspired market thinking that adds up to very decentralized schools-based development. This allows room for local school culture and learning communities with professional autonomy, but at the same time it is framed by an overall national curriculum in which tests and national standards set limits on what each school can do. Lastly, (3) Ontario represents a third model which lies between the English and the New Zealand model. Here a close interaction – or partnership – is developed between the provincial government and the many local schools and school districts. The central model of 'whole system reform' claims to allow for the development of learning communities locally with a predominantly helping and assisting attitude.

All three models have greatly inspired the reform of the Danish public school, even if policymakers and practitioners appear to have drawn rather different lessons from the models.

The United States: The Anglo-American Giant, a Paradoxically Underrated Player

Thus although English education policy and those of New Zealand and Ontario appear at first sight to be the most influential sources of inspiration for Danish schools policy, it would be a capital blunder to underrate the United States. Anglophone school policy networks, in short, have one very large and agenda-setting player (the United States), then a medium-sized UK (with England as the all-dominant part), then a number of smaller players such as Australia, Canada (especially Ontario), New Zealand, and Ireland.

Nevertheless, the United States seems almost absent from the Danish schools policy debate. As mentioned earlier, there are good reasons why Ontario and New

Zealand appeal more to Nordic sensibilities because of their more welfare-oriented approaches to education and policy overall. Nevertheless, it is important to understand that the development of many of the ideas circulating in the smaller anglophone countries was shaped in the struggles with and against ideas that emerged in the United States – high-stakes testing, accountability, school choice, standards-based education. This is the case with Ontario, whose school policy espouses a discourse about trust-based partnerships with schools and a broader view of what the full potential of the individual student means as opposed to the high-stakes testing and accountability represented by the No Child Left Behind School Act in the United States. Another important reason why the United States so rarely appears as explicit inspiration in the Danish schools debate is undoubtedly that the American school system is incredibly difficult to get an overview of, as it consists of 50 different states with school systems that differ considerably. Indeed, the United States has traditionally been home to one of the most decentralized school systems among OECD countries. It was not until the 1990s that the schools policies of individual states became increasingly aligned owing to evidence-based and standards-based policies, with the federal level of Washington DC an increasingly coordinating player – a process that commenced earlier and more pervasively in the United States than the transnational turn in European school policy (Krejsler, 2020).

In summary, from the 1960s onwards, a federal/national school policy was gradually established in the United States, driven in many ways by a 'fear of falling behind' discourse. It started with the federal 'Elementary and Secondary Education Act' (ESEA) of 1965, which catapulted federal influence into the domain of previously locally governed and state-governed schools policy. This was done with federal funding of measures that were aimed at combating poverty in school politics and ensuring equal opportunities for socially and racially vulnerable groups. The expansion of federal influence on schools policy was then consolidated in the 1980s with the 'A Nation at Risk' report (National Commission on Excellence in Education, 1983), and the resulting national focus on 'excellence' and 'standards-based education.' This development culminated in 2001, when the 'No Child Left Behind Act' institutionalized a more interventionist federal regime, thereby consolidating new relations between the states and the federal level (Hamilton et al., 2008; Krejsler, 2019; Rhodes, 2012). The consolidation of the standards-based school discourse was largely accomplished through a stream of reports, comparative studies, and rankings that linked economic growth and school outcomes in ways that created fears that the United States was about to lose its leadership role in the world (Rhodes, 2012). This led to the creation of a strong coalition extending from Republican to Democrat policymakers and across the large business community and key civil society actors, all of whom united on national mobilization around schools policy to prevent the US from 'falling behind.' With the passing of the 'Every Student Succeeds Act' (ESSA) of 2015, however, we seem to have reached a crossroads, at which schools policy seems to some extent to be sliding backward toward state jurisdiction, though the federal level retains some influence and supervisory obligations (McGuinn, 2016).

Overall, we see in the American developments and policies trends that have inspired similar developments in a European context, albeit in the form of

transnational bodies (the OECD, the EU, the IEA, the Bologna Process). This phenomenon could be called a transnational turn in school and education policy (Krejsler, 2020). Of particular significance, one could mention the American pressure on the OECD in the wake of the 'A Nation at Risk' report of 1983 to develop an international comparative study along similar lines as the United States' own 'National Assessment of Educational Progress' (Henry, Lingard, Rizvi, & Taylor, 2001; Lawn, 2013; Tröhler, 2013). This was to take shape in the form of PISA. And since 2000, we are thus also adapting our ways of speaking about schools and educational success in Europe according to the agenda set by PISA and its language on measuring robust and relevant learning that corresponds to what students need in order to succeed in global knowledge economies. The American discourse on 'college-and career-readiness' and focus on 'higher-level skills' is also very much in line with the discourse on 'employability,' 'lifelong learning' and 'twenty-first century skills' that we see in the European-based transnational collaborations in the EU, the Bologna Process, and the OECD. The development of the 'learning goals directed school' in Denmark thus aligns very well with American standards-based education and with American confidence in tests as the privileged indicator of student and school performance. While this reform pressure gained momentum in the United States in the 1990s, it was by contrast only after the turn of the millenium, and in earnest after 2006 that it really pushed through in Denmark. In the period between the national curriculum initiatives of 'Common Objectives 2009' and the tightened version in the 'Simplified Common Objectives' of 2015, we have seen in Denmark the introduction of adaptive digital national tests and the tightening of the 'learning goals directed school.' With these developments, the national learning goal directed steering of schools is increasingly beginning to resemble many aspects of the curriculum thinking in the American 'Common Core State Standards' (CCSS). The similarities emerge in the creation of a taxonomically similar system of competence areas, operationalized into knowledge and skills areas and objectives. For each subject, these signal a progression in expectations in what students are expected to know from first grade through ninth grade. Paradoxically, we see that the tightening of curriculum thinking in Denmark is occurring during the very same period when the United States is facing increasing opposition to the NCLB's high-stakes testing and accountability thinking. Here, too-rigid goal management led to contestation, and support for high-stakes accountability and testing is now on the wane. It is clear, however, that in the Danish context, the trends from the United States follow with years of delay, but never adopting the high-stakes model we see in the United States – rather, the low-stakes models we see in Ontario, for example, which is explicitly referred to in the 2013 school reform in Denmark (The Danish Ministry of Education, 2013).

Conclusion: Adopting and Re-contextualizing Anglo-American Influences on Danish Schools

Since the 1990s in particular, Danish - and Nordic - schools and education policy has been increasingly influenced by Anglo-American understandings of how to improve school and education. As pointed out, this was due to an interplay of influences stemming from three factors: (1) postwar US economic and cultural dominance (de Grazia, 2005), which simultaneously favored the other medium-sized and smaller anglophone nations on the periphery of what became the agenda-setting Anglo-American networks; (2) the developments in the wake of increasing transnational collaboration in Europe, gradually institutionalized in the realm of schools and education policy in the OECD, the EU, the Bologna Process, and the IEA (Krejsler, 2018); (3) the importance of these developments for understanding how the hegemony of Anglo-American norms and language migrated from the realms of economics and geopolitics to also include school and education collaborations. The last of these three strands gained momentum in earnest as education became increasingly related to economic growth (Elfert, 2019; Tröhler, 2013). This could be seen in the advance of the 'knowledge economy' and 'human capital' discourse, which raised education and lifelong learning on the political agenda (de la Fuente & Ciccione, 2003).

As this chapter has highlighted, the pervasive Anglo-American influence on Danish – and Nordic – school and education policy can above all be expressed in the following:

1. Human capital and rational choice theory had a pervasive impact on Danish schools and education policy, in light of the increasingly important role school and education were assigned in global 'knowledge economies.'
2. The school effectiveness and improvement movement in many ways developed and disseminated the ideas of 'knowledge that works' and school reform, which gained dominance in the OECD and other transnational arenas and which have directly inspired and influenced Danish schools and teacher education policy.
3. The 'evidence' movement transformed dominant policy conceptions of how we produce knowledge about what works. Here it is important to distinguish between the various forms of 'evidence' – ranging from the belief in randomized controlled trials, to John Hattie's 'visible learning,' to the continental European variants that we know from Hilbert Meyer, Andreas Helmke and others – that have influenced the development of Danish interpretations.
4. The inspirations from policies in England, New Zealand, and Ontario (Canada) have been particularly influential in impacting Danish schools and teacher education policy. In the case of the New Zealand and Ontario models, this is largely due to their 'softer' low-stakes accountability approaches, which have resonated better with Nordic welfare-oriented approaches than the harder-core 'high-stakes' accountability approaches seen in the United States. English policy, by contrast, despite drawing on a more welfare-oriented society, chose a high-stakes

accountability approach in education similar to that of the United States. Accordingly it has been influential in mediating 'new public management' and market-like approaches in education to Denmark.

5. Finally, it is the policies of the great Anglo-American player, the United States, that have largely – albeit often indirectly – set the agenda for schools and education policy within the Anglo-American networks, and thus for many of the developments that governments in Europe and in Denmark have adopted and relied on (Krejsler, 2020).

Different European and Nordic countries, including Denmark, represent different policy contexts and have responded differently to the interactions between Anglo-American contexts and continental Europe. Nonetheless, the significant impact remains (Steiner-Khamsi, 2012). In practice, much of this policy borrowing has been mediated in the form of transnational collaborations such as the OECD, the EU, the IEA, and the Bologna Process. For such endeavors to be workable, transnational policy has to be decontextualized to the extent where all participating nation states can recognize themselves in the consensus that is gradually minted; thereafter, this decontextualized policy must then be re-contextualized in each nation state in accordance with what is politically and educationally possible there.

Danish schools policy, as well as the schools policies of Denmark's Nordic neighbors, are located within these networks as relatively small players that do their best at making sense out of what appears necessary in European and geopolitical contexts. Here adaptations are important for re-contextualizing Anglo-American influences into discourse and practice that makes sense and is viable in the national context and its particularities. As far as Denmark is concerned, this has been demonstrated in its particular adoptions of Anglo-American ideas about how to frame school – in a national curriculum that is measured by testing, in order to ensure student performance that is comparable on the global arena.

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Chapter 8
The Nordic Social Democratic Regime in Education Colliding with the Global Neo-Liberal Regime

Risto Rinne

Abstract Nordic countries have historically constructed the so-called social democratic welfare model with its core values and political, cultural and economic aims and ideologies. Some comparative researchers have also claimed that one of the dimensions of this model has been the Nordic or social democratic educational model, which has historically united the educational politics of the five countries (see e.g. Tjeldvoll A: Introduction. In: Tjeldvoll A (ed) Education and the scandinavian welfare state in the year 2000 – equality, policy, and reform. Garland Publishing/ Taylor & Francis Group, New York/London, pp xi–xviii, 1998a; Telhaug AO, Mediås OA, Aasen P: Scand J Educ Res 48(2):141–158, 2004), JustEd – Nordic Centre of Excellence: Justice through Education in The Nordic Countries).

This situation has certainly changed and the Nordic nations have made different kinds of educational political decisions especially during the latest 40 years of globalization and the mainstream of neoliberal educational politics, but still preserved some parts of their historical common core.

In this chapter I describe historically the global turn towards neoliberal educational politics and compare and research, how the Nordic countries and especially Finland have reacted and interpreted the global pressures of the supranational organizations and the reform movements in different dimensions. These dimensions or themes of global neoliberal educational politics involve e.g. new governance, New Public Management, steering at a distance, steering by numbers and privatization of education.

Keywords Neoliberal education policy · Nordic education policy · Global governance of education · Path dependence in Finland · Contingency

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Introduction

The orthodox conception of national education systems focus upon quite distinct functions, and distinct sets of rules and beliefs. Those have been:

> …historically rooted in an assumption of the centrality of national economies – for instance, that the function of education systems was to provide educated labor for the national economy and that education systems would shift and separate the potential workforce, according to ability and potential contribution to the economy. Another assumption was that education systems are crucial to the construction of national culture, integration and sense of national belonging (Parreira do Amaral & Rinne, 2015, 80–81).

But it is evident that greater global interconnectedness and a nascent global educational community, mediated, translated and re-contextualised within national and local education structures is creating a certain resemblance among educational policies across nations (e.g., Lingard, 2000). The waves of global policy reforms ("travelling policies") have a tendency to disseminate around the globe and reshape socially and politically different societies with dissimilar histories. These transnational trends and tendencies do not simply shape the regional, national or local policies but they rather collide and intertwine with "embedded policies" to be found in "local" spaces (national, provincial or local) where global policy agendas come up against existing practices and priorities (Ozga & Jones, 2006; Simola, Varjo, & Rinne, 2014, 224).

It is helpful to understand that the new strong principles of calculability and measurability, which have usually been in use in the private sector, originating from economics, are increasingly transferred to fields previously regulated by old bureaucratic statutes and professional norms, usually located in the public sector and education. Rose (1999, 152) refers to the new governing technology based on accountability and assessment to which the public sector is subjected as *'governance at a distance'* (Rinne & Ozga, 2011, 67). According to Rose the new steering has consequences in terms of the shift towards an "*Audit Society*", where every new space subjected to comparability, measurability and transparency summons its population to evaluate and measure themselves, to translate their activities into measurable and economic language in order to maximize efficiency and income, and the arbitrary rules become "*tamed, liberalized and acknowledged as neutral and objective calculation and evaluation*" (Rose, 1999, 152–154; Rose & Miller, 1992; cited in Rinne, 2001, 107).

There are strong supranational organisations like the World Bank, the International Monetary Fund, UNESCO, the OECD and the EU, which have a strong impact on national education politics. Now the times have changed. The OECD, previously called the "*debating club*", the "*toothless tiger*", the "*eminence grise*" the "*global office*" is rating and ranking nations and telling them the orthodox answers, how to classify, how to measure and how to produce "best practices".

In relation to steering tools, there are strong ways in which e.g. the OECD's "*knowledge-based regulation tools*" (KBRT) attempt to promote and change orthodox professional practice and increased standardization of professional formation

and development. The strength and power of these tools lie in their apparently objective nature, in the attractiveness of the space of negotiation and debate that it creates, where experts, policy makers and other knowledge-brokers meet and position themselves, and in its capacity to define the terms of that engagement (Rinne & Ozga, 2013, 97).

According to Pons and Van Zanten (2007) these tools have three main elements:

(i) they reflect particular 'world visions' that represent the agenda setting capacities of particular interests
(ii) they represent a particular and politically oriented set of beliefs concerning legitimate policy in a given domain and
(iii) they represent a wide and growing network of actors who are constantly drawn in to the process of intelligence-gathering, audit and meditative policy-making (cited in Rinne & Ozga, 2013, 97).

In order to grasp the implications of the increasing complexity of the emerging multi-scalar/multilevel governance arrangements in each state and in Nordic states as well, we need to devise a new set of lenses to look at the issues at stake. Roger Dale sees this as a major shift:

> With new forms of complex governance, the state form… loses its monopoly position in the production of collective solutions to the collective problems. Collectively binding decisions are no longer be taken by the state alone, or among sovereign states, but rather with the involvement or various types of societal actors, sometimes even without governments (Dale, 2009a, 30).

Dale and Robertson (2009, 23) also make a similar argument and emphasize, a change of the

> 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 (See also Dale, 2003).

In similar vein, Verger, Lubienski & Steiner-Khamsi (2017, 4) are analyzing the growth of "*Global Education Industry*" and see that also the emergence of this has meant the development of the new market niches, "*that are often outside of traditional state control, such as preparation, edu-marketing, the provision of curriculum packages or school improvement services*".

Nordic countries have historically constructed the so-called social democratic welfare model with its core values and political, cultural and economic aims and ideologies. Some comparative researchers have also claimed that one of the dimensions of this model has been the Nordic or social democratic educational model, which has historically united the educational politics of the five countries (see eg. Tjeldvoll 1998a, b; Telhaug, Mediås, & Aasen, 2004; Antikainen, 2006; JustEd – Nordic Centre of Excellence: Justice through Education in The Nordic Countries).

This situation has certainly changed in recent decades and the Nordic nations have made different kinds of educational political decisions especially during the

latest 40 years of globalization under the mainstream of neoliberal educational politics, but still preserved some parts of their historical common core.

In this chapter I describe historically the global turn towards the neoliberal educational politics and compare and research, how the Nordic countries and especially Finland has reacted and interpreted the global pressures of the supranational organizations and the reform movements in different dimensions. These dimensions or themes of global neoliberal educational politics involve e.g. new governance, New Public Management, steering at a distance, steering by numbers and privatization of education.

The Mainstream of Global Neo-Liberal Regime and Governance[1]

One of the striking features of the postmodern global world is "the educational gospel", the amazing persistence in believing in the strong connection between economic development and the growing role of education. The idea behind this way of thinking, especially in the developed countries, is that we have entered the new "knowledge economy" and the "age of human capital". This policy mantra forecasts a knowledge economy in which most people are highly skilled, highly waged employees. The wording has changed little since the 1960s when the theory of human capital was glorified in educational and economic policy (Brown, Lauder, & Ashton, 2007, 190).

The ascendancy of neoliberal theory in policy-making has given prominence to particular ways of looking at education as human capital: as a driver of economic growth, as a private rather than a public good, and as the new service sector within the economy. This idea is also behind the creation of "New Europe" as the Europe of Knowledge (Robertson, 2009,70).

Education has traditionally been regarded as one of the most national of public activities.

> It is the institution through which new members of the society are socialized into its ways and understandings, and learn the values and the rules of appropriateness of the society (Dale & Robertson, 2007, 217).

When considering the new roles of nation states and supranational organisations, Dale (2009b, 122–127) argues three false methodological assumptions of "isms" have long prevailed in producing misunderstanding when discussing and comparing education in the old world order, and which have also been very strongly rooted in the historical tradition of all Nordic countries. These are "*nationalism*", "*statism*" and "*educationism*". Nationalism means that we still think that the nation states

[1] This sub-chapter is strongly grounded on the article of Rinne, R., Simola, H., Varjo, J. & Kauko, J. (2013) The Paradox of the Education Race: How to win the ranking game by sailing to headwind. Journal of Education Policy 28 (5), 612–633.

strongly work on their own and the regions follow the nations. Statism means the thinking that the state is the source and means of all governing activity, which is taken for granted, though it is essentially contingent. Educationism refers "*to the tendency to regard education as a single category for purposes of analysis, with an assumed common scope, and a set of implicity shared knowledges, practices and assumptions.*" By these isms education is often treated as "*abstract, fixed, absolute, ahistorical and universal*" (see also Dale & Robertson, 2007; Rinne, Simola, Varjo, & Kauko, 2013; Robertson & Dale, 2008).

During recent decades a new global neoliberal policy paradigm has emerged. There are several reasons behind this. One of the most crucial has been the rejection of the ideas of the Keynesian welfare state. Governments have increasingly praised a minimalist role for the state in education, greater trust on market mechanisms and new public management principles and have become unwilling to pay the costs for ever increasing educational expansion. This new globalization policy has normalized a "growth-first approach", naturalized the market logics and individual choices, privatization, deregulation and competitive regimes of resource allocation as the only true social imaginary or There Is No Alternative -thinking (TINA) with its images, myths, parables, stories legends and narratives (Rizvi & Lingard, 2010, 3, 31–34, 37; Mundy, 2007, 26; Soguel & Jaccard, 2008, 1; Rinne et al., 2013).

This new paradigm has won considerable room to go further in Nordic countries, especially in Sweden e.g. through the reforms of privatizing public schooling, making visible and usable school rankings for parental and pupil choices and accelerating the competition between schools and pupils. Finland has stuck more distinctly to the old Nordic historical tradition and paradigm (Seppänen & Rinne, 2015).

The reasons behind the reassessment of governance might be listed as: economic recession and diminishing public expenditures, globalisation and new games without frontiers, disappointing achievements of national governments and distrust of them, an ideological shift towards the market and the rise of the new public management (NPM) movement (de Boer, Enders, & Schimank, 2008, 36–37).

According to Leuze, Martens and Rusconi (2007, 3), the changes in education can be attributed to two main trends: (1) the growing activity of international organizations (IOs) in education policy making and (2) the increasing marketization of the field of education. Education has been transferred into the field of international policy making beyond national boarders and regionally or universally applicable models for education have been produced. Increasing marketization is turning education into a tradable commodity and adding private providers as well as competition for students.

Neoliberal policies have brought attempts to stimulate market forces by making schools behave more like businesses, through giving them greater autonomy and encouraging parents to behave more like customers, through relaxing admissions policies and diversifying types of schools. One of the strongest and most discussed matters has been publishing of league tables, because they expose the uneven distribution of educational attainment, organise schools in ranking lists and establish the worth of the schools in educational market (Power & Frandji, 2010, 385–386).

Now the times have changed. Previously designated with monikers like the "*debating club*", the "*toothless tiger*", the "*eminence grise*" or the "*global office*", the OECD is now rating and ranking nations and telling them the orthodox answers, how to classify, how to measure and how to produce "best practices".

The role of supranational organizations like the OECD has been most crucial in the formation of the new supranational educational politics and the new politics of "*governance by comparison*" (Martens, 2007, 40). But it is crucial, however, to recognize that

> there is no zero-sum relationship between global and national or subnational forms of governance. International Organisations (IOs) do not replace nation states, but create additional and informal structure of authority and sovereignty besides and beyond the state (Dale & Robertson, 2007, 222).

As Antonio Nóvoa and Tali Yariv-Marshal (Nóvoa & Yariv-Mashal, 2003) write: "*the global eye works together with the national eye today in both education policy and governance*" (quoted in Rizvi & Lingard, 2010, 56).

There are also ambivalent effects for nation states and the role of supranational organisations has been controversial compared to the role of national governments. We might say that "*Nation states, IOs and markets might be hostile siblings in the governance of education*" (Weymann, Martens, Rusconi, & Leuze, 2007, 238). Martens and Wolf (2009) describe this controversy elegantly using metaphors in their article "*Boomerangs and Trojan Horses: The Unintended Consequences of Internationalising Education Policy Through the EU and the OECD*".

In their example of the EU it was just the governments who wanted to ask for advice from international organizations for their educational politics and strengthen their national reformative position at home and to defuse the domestic opposition, but by no means weaken governmental influence at any level. But the boomerangs went astray from the throwers and weakened their power (See also Rinne et al., 2013).

In the example of the OECD and especially indicators and PISA, national governments wanted to make a comparison between nation states to strengthen their power, but as the unintended consequence the Trojan horse opened the gates and now these governments are in a totally new situation of regular comparative assessments of their performance in educational politics. In this respect, the new standard setting of the supranational organisations has challenged the traditional ideas of national meritocratic competition, and nation states are losing their power to define standards and to control the key features of their national education with all the nation state functions including the educational selection (Martens & Wolf, 2009; Rinne & Ozga, 2011, 68; Rinne et al., 2013).

We have stepped in to the "audit society", "*steering at a distance*" society, where the audit culture is closely linked to new public management and accountabilities and summative assessment and evaluation (Power, 1999, 2003). This fundamental change has been analyzed through the metaphors of "*quality revolution*", the "*evaluation industry*", and the "*audit explosion*" (Lawn & Grek, 2012, 85). We have

become the citizens of the "evaluative state", but all the more of the evaluative "*suprastate*" (cf Maroy, 2008; Neave, 1998). We have become "*governed by numbers*" (Grek, 2009; Rose, 1999) or "*self-capitalizing individuals*" (Rose, 1999) or "*self-responsbilizing individuals*" (Rizvi & Lingard, 2010, 98–99, 119; 138). A kind of "*metrological mood*" has become the mechanism through which education systems are measured and made accountable (Lawn & Grek, 2012, 119; cf Power, 2004, 766; Rinne et al., 2013).

"*Less government and more governance*" has become the widely shared creed. (de Boer et al., 2008, 35; cf. Frederickson, 1999, 705). We may take the starting point in "*governmentality*" and end up with a new imperative in neoliberal governance – "*agile bodies* "– the person as an enterprise (Gillies, 2011). We have seen the "*governance turn*" as a shift in strategy that "*is highly dependent on the appearance of deregulation, but that is equally marked by strong central steering through various policy technologies*" and sophisticated instruments of steering of policy – standardization quality benchmarking and data harmonization" (Ozga, 2009, 150, 158). "*Governing needs data and is legitimated by them*" (Lawn & Grek, 2012, 85). "*Through all of its work the OECD is part of and helped constitute the new form of global governance in education, as well as within nations*" (Rizvi & Lingard, 2010, 133) (Rinne et al., 2013).

Neoliberalism paradoxically re-asserts the state's role when attempting to reduce its financial responsibilities in the public sector – it centralizes and decentralizes the state at the same time. Of utmost importance for neoliberalism is "*the development of techniques of auditing, accounting and management that enable a market for public services to be established autonomous from central control*" (cf. Webb, 2011, 736; Barry, Osborne, & Rose, 1996, 14).

In the new global audit or assessment building, we may categorize some interconnected central features of the new supranational mainstream of quality assurance and evaluation practices and technologies of educational politics on primary and lower secondary school level based on earlier literature (Ozga, Dahler-Larsen, Segerholm, & Simola, 2011, 124–125; Rinne & Ozga, 2011; Rinne, 2001; Maroy, 2008, 17–20; Power & Frandji, 2010, 385–386; Rinne et al., 2013):

1. *Strong marketization* which is understood to lead to excellence
   - large sector of independent schools
   - strive for individualisation and excellence
2. *Choice and visibility* enhancing marketization:
   - consumer and parental choice
   - high local accountability including intelligent accountability
   - large assessment enterprises
3. *Ranking and classification* supporting visibility
   - national testing systems
   - league tables, ranking lists

4. *Control* promoting visibility

- growing inspection and monitoring system
- strong quality assurance regulation
- control, sanctions and rewards on the basis of collected assessment data

The Nordic Historical Tunes of the Social Democratic Educational Politics Regime

The State has traditionally played a prominent role in the Nordic countries. With the help of large corps of State officials, the central authorities seriously set out to direct and control their citizens. The social elite and its associated professional groups were trained in public institutions of higher education and were employed in the service of the state or the public sector. There has been a very strong belief in the importance of education in building the nation. Since the Second World War there has been a particularly heavy emphasis on the ideological "social democratic" concept of citizenship, and the ideal of the egalitarian "*citizen worker*" (cf. Hernes, 1988; Kivinen & Rinne, 1990b, 1992). The social-democratic regime has relied on corporatism, a strong public sector and symbiosis between social movements and political parties, and the State professions educated by the institutions of higher learning have been entrusted with a vital role (Kivinen & Rinne, 1990a, 1998).

A comparison of the Nordic countries with other European countries still in the 1980s, before the great depression set in at the beginning of the 1990s, shows that the differences were still striking. A clearly social-democratic welfare regime was the Nordic norm: in accordance with the Keynesian policy of "full employment", unemployment was kept low (4%), as against 10 per cent in the EU countries; more Nordic women were employed outside the home (more than 70% of women of working age compared to 50% in the EU countries), and the level of public-sector employment was higher (more than 26% in the Nordic countries compared with less that 18% the EU) (Kosonen, 1992, 17; Rinne & Kivinen, 2003; Rinne, 2004).

It was not until the late 1980s and 1990s that the deeper discussion on types, models and regimes of welfare began. Gösta Esping-Anderssen (Esping-Andersen, 1990, 1999) suggested that the different relations typically existing between welfare states, the labor market and families could be characterised in terms of three welfare regimes, the Liberal, the Social Democratic and the Conservative. Later on he elaborated on this classification. One of the regimes, the Social Democratic regime, has nonetheless remained stable. It could also be called the Nordic regime, or the Nordic welfare model. Although Esping-Andersen's classification is socially and historically broader and he calls the model Nordic, it could also be combined with the Scandinavian model (Kautto, Fritzell, Hvinden, Kvist, & Uusitalo, 2001, 4–6; Erikson, Hansen, Ringen, & Uusitalo, 1987).

> The term Scandinavia is often used by the Anglo-American world not only to refer to the peninsula itself but also to the whole north-western region of Europe which includes Denmark, Finland, Iceland, Norway and Sweden and has the population of about 20 million people,

noted Arild Tjeldvoll in the introduction to his book "*Education and Scandinavian Welfare State in 2000 – Equality, Policy and Reform*" (Tjeldvoll, 1998a, xi–xii). He claims, as does Esping-Andersen, that a typical characteristic of all five Scandinavian countries is the kind of welfare state model adopted. At the heart of this model, as he puts it, is a striving for social justice and the ideal of a democratic society that has been promoted historically through social and educational policies.

Arild Tjeldvoll (1998b, 4–7) describes a particular "*Scandinavian education model*" as the model, the aim of which is to produce equal educational opportunities for all citizens. This educational system was in general terms nationally strongly centralized in terms of the curriculum, examinations and governance until the 1980s. Many other researchers, including Kjell Rubenson (2007) and Ari Antikainen (2008), have called this specific model the "*Nordic model of education"*.

We also have good reasons for naming the higher education systems of the Nordic countries as the *Nordic university model*.[2] It was a model in which the university sector followed a wider educational and state policy, and surrendered almost entirely into the hands of the nation state. Even higher learning is referred to as the institution for promoting democracy and equality among citizens in society. In Finland universities as well as all other education of the country are still almost entirely publicly funded. There are no student fees and there is very little room, if any for private institutions. The institutions were, at least officially, homogenous and equal, and there is no educational market. A centralized administration and state management guaranteed the limitations on competition. An important principle was to keep any degree-level education free of charge, in the spirit of the Nordic welfare-state model.

The Nordic higher-education model combines the features of fast expansion, strict central planning and regional policy. In a sense, the Nordic university model could be described as an inverted mirror image of the so-called Anglo-Saxon model.

For historical reasons the Nordic education model was strongly influenced by the powerful nation state up until the late 1980s. The education systems in the Nordic countries were in many ways, the inverted image of for example those in the US. The Nordic education model such as the Finnish one has long been characterised by (Rinne, 2004, 92; Kivinen & Rinne, 1993, 183; Fägerlind & Strömqvist, 2004, 45):

- Relatively small size and restricted markets.
- Strict centralization and the control of resources.
- Formal institutional uniformity with almost no hierarchy ostensibly recognized.

[2] When I characterise and analyse the Nordic education model here I am consciously using Finland as a representative of the Nordic countries.

- Restricted competition, exercised with respect to State-controlled resources rather than markets, students or business.
- Low institutional initiative in that conditions of strict centralisation have inhibited initiative taking, challenges to bureaucratic rule in the universities,
- The right to study in institutions of all education free of charge.
- A strong belief in fostering social equality by removing the obstacles preventing inequality of opportunities in all education.
- The education policy as a vital part of broader regional and social policies.

Transition from the Nordic Social Democratic Model to the More Western Anglo-American Liberal Model[3]

In 1987 the new Finnish Prime Minister Harri Holkeri's new cabinet aimed to bring about a fundamental change in Finnish politics. For the first time since World War II, the conservative National Coalition Party held the post of Prime Minister and its two decades in opposition were over. As far as education was concerned, this marked the end of the deal between the Centre and Social Democratic parties in the Ministry of Education and the National Board of Education, and the right wing was set to dominate State educational discourse. The posts of Ministers of Education also went to right-wing ministers. The changes in education were part of a general wave of decentralization and deregulation in Finland. The process started with the Free Municipality Experiment (Law 718/1988), which gave local authorities in experimental municipalities more freedom to make independent decisions.

The recession in 1991–93 heralded the deepest peacetime crisis in Finland's economy until then.

When Finland had finally joined the OECD, Finland became the OECD's "*model pupil*" in applying neoliberal innovations in education (Rinne, 2007; Rinne, Kallo, & Hokka, 2004), but through technical and incremental policy rather than through making strong neoliberal declarations. A leading ex-politician characterized it as a "*tiptoeing education policy change"* (Rinne, Kivirauma, & Hirvenoja, 2001). OECD's own account of Finland stated: "*Finland has a record of heeding the advice of past OECD education reviews. The review seems likely to continue that pattern, helping to shape the future of a dynamic education sector.*" (OECD, 2003, cited in Rinne et al., 2004).

[3] This subchapter has partly been grounded on the article of Simola, H., Varjo, J. & Rinne, R. (2014) Against the Flow: Path dependence, convergence and contingency in understanding the Finnish QAE model. In H. Simola, I. Carlgren, S. Heikkinen, J. Kauko, O. Kivinen, J. Kivirauma, K. Klette, S. Myrdal, H. Pitkänen, R. Rinne, K. Schnack, J. Silvonen & J. Varjo (Eds.) The Finnish Education Mystery. Historical and sociological essays on schooling in Finland. Oxon & New York: Routledge, 224–251.

The titles of some publications (published in Finnish only) of the National Board of Education (NBE) and the Ministry of Foreign Affairs (MFA) reveal the positive and highly respectful attitude to the OECD: *Learning from the Analysis of the OECD* (Laukkanen & Kyrö, 2000); *OECD – Firm Base for Decision-Making* (, 1999); *OECD – Directions for Policymaking in the 21st Century* (, 2001); *OECD Resources for Decision Making in the Era of Globalization* (, 2005). The exceptionally receptive stance of the Finnish education policy elite towards the OECD has been noted by various commentators. Interviewees in Niukko's (2006) study, for example, refer to mutual respect especially following the recent attention given to Finland after its national success in PISA (Grek et al., 2009, 17, 14).

Among other things, PISA taught Finnish education politicians and officials the real "*market value*" of international comparisons. Our interview data of Finnish education politicians and officers makes it quite apparent that the OECD is seen as a transcendent carrier of reason (see also Niukko, 2006, 112). It may be seen as creating a consensual community, a discourse of truth, a style of reasoning.

Interviewees described the importance and meaning of OECD meetings and texts as follows: "*OECD-doctrine*" (Niukko, 2006, 122 and 126), "*up-dated themes*" (ibid., 111), "*magic of numbers*" (ibid., 117), revealed "*the only table where Finland can sit with the G8-countries*" (ibid., 130); "*a common council of the sages*" (ibid., 131); "*guiding member states in the same direction*", setting "*peer and moral pressure*" (ibid., 143); "*moral commitment*", and numerous "*indirect effects*"' (ibid., 144), guaranteeing "*the economic as the primary nature of education*" (ibid., 161–164); "*tuning sentiment and sympathy*" "*modernization*" (interview 10, April 2007, Finnish policy actor 3).

Some high level politician interviewees refer to the OECD as "*the instrument, catalyst and certain framework for comparison*" for Finnish education policy (Niukko, 2006 130) and admit that *Education at a Glance* and rankings in PISA "*do have clear effects to policy, especially if you are ranked below average*" (ibid., 141). In Niukko's (2006) study, decision-makers and civil servants alike saw the most important function of the OECD in its role "*as a neutral tool of the national education policy*". Some of them criticized OECD as "*the judge*", and others characterized it as "*the doctor*" or "*the psychiatrist*" (Grek et al., 2009, 15–16).

But Finland still strongly adheres to its historical *path dependence* and takes into account the Nordic historical roots of Finnish education against the global mainstream trends, convergence and contingency. From the perspective of path dependence Finland was strongly bound to traditional social democratic and agrarian values of equality that make the call of neo-liberalism appear extremely contradictory. As a symptom of the symbolic power of traditional social democratic-agrarian *equality* Finnish educational discourse was very strong and hegemonic.

Embedded Path-Dependent Egalitarianism, Travelling Market-Liberalism, Contingency and Radical Decentralization

In the 2000s, the particular Finnish Model of Quality Assurance and Evaluation (QAE) in Basic Education seems to differ strongly from the mainstream of international and global evaluation policies. This has its roots in two historical developments: firstly the Finnish path-dependence in egalitarianism, which has been challenged by the converging market-liberalism, and secondly the path-dependence of deregulation, which had its spur in converging international education policies.

Given that most policy proposals have been directive rather than mandatory, it is no wonder that their implementation at the municipal level varies widely. The Finnish Parliamentary Committee for Education and Culture concluded in 2002:

> The evaluation work done has had very small effects at the level of municipalities and schools. Nation-level evaluations have been implemented to a creditable extent, but there is no follow-up on how these evaluations affect the actions of the evaluated and the development of the schools. […] Many municipalities are at the very beginning as far as the evaluation of education is concerned (CEC, 2002).

Therefore, I venture to suggest a dimension of contingency here, as well, although in a different sense than the previous one. In this case, an intervening conjunction – the deep economic recession and the radical municipal autonomy linked to it – circumvented and extinguished the reform intentions. Ironically enough, it seemed to create unintended side effects: more trust and freedom.

How do you understand the power and strength of a nearly silent or mute national consensus in Finland that was based on antipathy and resistance rather than on any articulated policy program? Something unexpected and dramatic happened in Finland in the early 1990s. The recession in 1991–93 heralded the deepest peacetime crisis in Finland's economy. According to many indicators, the Finnish crisis was the sharpest and deepest among the industrialized countries facing economic problems during the 1990s and it was comparable only with the Great Recession of the 1930s (Kiander & Virtanen, 2002; Rinne, Kivirauma, & Simola, 2002; Simola, Rinne, & Kivirauma, 2002).

The process of decentralization and deregulation started in the late 1980s, but in the depth of the recession the new legislation with the Act on Central Government Transfers to Local Government (Law 705/1992) and the Local Government Act (Law 365/1995) radically increased local autonomy and strengthened the judicial position of the municipalities. The new state subsidy system granted funding according to annual calculations per pupil, lesson or other unit, and liberated the municipalities from the former detailed 'ear-marked-money' budgeting towards the free lump-sum budgeting mechanisms for schooling (Simola, Rinne, Varjo, Kauko, & Pitkänen, 2009).

It is widely accepted among the political and economic elites that without shifting decision-making to the local level the municipalities could not have been required to cut spending as much as they did during the recession. Thus, the new

decentralized and deregulated mode of governance was moulded around the economic principles of savings and cutbacks. The Recession radicalized decentralization and deregulation:

> The decentralization level of the educational administration in Finland is one of the highest in Europe, according to the information of the OECD (Temmes, Ahonen, & Ojala, 2002, 129, 92).

The Recession of the 1990s thus radicalized decentralization and deregulation:

> One of the most serious institutional issues in our educational system is the unsatisfactory relation between the State and the municipalities. … The decentralization level of the educational administration in Finland is one of the highest in Europe, according to the information of the OECD (Temmes et al., 2002, 129, 92; original emphasis).

According to a European Commission study on the evaluation of schools providing compulsory education in Europe states that Finland is one of the few European countries in which there is no direct control from the national to the school level.

The new policy created space for the *Association of Finnish Local and Regional Authorities* (AFLRA) to take its place as a distinguished actor in restructuring the Finnish nation–municipality relationship and in the field of education policy. While cooperating with governmental organs, ALFRA is contributing both as a lobbyist and an expert in major decision-making processes concerning education. At the local level the AFLRA produces indicators, reference values and best practices for municipal councils and officials. According the municipalities are no longer mere education providers executing top-down, national level decisions, but genuine political actors possessing an intent of their own – and, thus, a vast amount of *Spielraum* in this peculiar twofold system, where the nation-state *and* municipalities are the main actors in education policy (Kauko & Varjo, 2008; Sarjala, 2002).

The radical decentralization and deregulation spawned two competing coalitions in the national QAE field of compulsory schooling, neither of which has real normative power over the municipalities and schools. On the one hand the ME and the NBE consider QAE from the perspective of the education system and the associated legislation, and on the other the AFLRA and the Ministry of the Interior – often accompanied by the Ministry of Finance – see it in terms of municipal service production and legislation. Both of these coalitions have attempted to assume the leading role in determining the discourse of evaluation in the context of education (Simola et al., 2009).

The frustration seemed to be most evident among our interviewees from the NBE, whereas in AFLRA there appeared to be a kind of complacent acceptance of the predominant situation. One high-ranking NBE official explains his/her feelings:

> (…) we have no jurisdiction to touch anything, we have no legislation about it, we have no mechanisms, we have nothing. This, in a nutshell, is our biggest weakness (Simola et al., 2009, 171).

A kind of stagnation is reflected in the most recent report of the Working Party for the Development of Educational Evaluation, set up by the ME. Virtually the only concrete proposal was to move the FEEC office to Helsinki. There are also serious

political projects on the agenda of both main coalitions: at the state level, the role of the NBE in the evaluation process is an open question, and AFLRA is currently engaged in a project for restructuring local government and services in Finland (*PARAS*), the aim of which is to reduce the number of municipalities (Simola et al., 2009).

It is thus obvious that the radical municipal autonomy, spurred and deepened contingently by the Recession of the 1990s, was one of the factors that have buffered the implementation and technical development of an effective Quality Assurance and Evaluation (QAE) system in Finnish comprehensive schooling. If the role of radical municipal autonomy has been prohibitive towards convergent tendencies, we may mention some other contingent factors that have supported the egalitarian path dependency. Those are a revalorization of the idea of comprehensive school and of the Finnish PISA Miracle itself.

The consequences of the Recession of the 1990s not only speeded up the change. It also strengthened and revitalized the Nordic egalitarian ethos again so far that even the idea of comprehensive school probably survived thanks to it. For example, Sirkka Ahonen (2001, 2003) argues that the recession altered the political atmosphere in favor of market liberalism back to traditional Nordic welfare values, and thus, defending common comprehensive school. Ahonen's argument is plausible when contextualised to a time when national plans were employed to restructure the education system. The deep economic recession made the value of social safety nets visible even to the middle classes. In the late 1990s, no political actors were willing to question the rhetoric of equality in education discourse (Grek et al., 2009, 12, see also Rinne et al., 2002; Kallo & Rinne, 2006; Patomäki, 2007). Respectively, no political actors in our interviews in the late 1990s and the early 2000s were willing to accept neoliberalism as an emblematic concept for Finnish policy making (Rinne et al., 2002; Simola et al., 2002).

Another totally unexpected event was the Finnish success in OECD PISA rankings. Quite controversially this success not only stifled pressures for change in municipal and school autonomy. Finland used to do pretty well in traditional school performance assessments such as IEA studies but it never came up as a top performer. It was symptomatic but also ironic that just a few weeks before publication of the first PISA results in December 2001, the Education Committee of the Confederation of Finnish Industries and Employers (CIE) organized an Autumn Seminar where the Finnish comprehensive school was strongly critisized. Even afterwards nobody has been reported for being a predictor of the Finnish PISA success. It is self-evident that this success, on the one hand, has embanked pressures for change in municipal and school autonomy and, on the other hand, buffered other (market-liberalist) innovations in the Finnish comprehensive schooling: "*if it ain't broke, don't fix it*". The success also saved the equality-aims of common comprehensive school from radical changes, which were under their way because of the political changes towards the right in Parliament.

Summing up, the Finnish comprehensive QAE model meets travelling market-liberalist steering policies and the embedded egalitarianism. To understand who wins in this sharp confrontation, the concept of contingency appeared useful. We

can say that contingent factors or events – such as radical municipal autonomy and revalorization of the idea of comprehensive education, both consequences of the Recession of the 1990s, and finally the Finnish PISA success – favored the path dependent egalitarianism rather than convergent market-liberalism.

Concluding Remarks

It seems evident that an extremely strong contradiction emerged between the converging pursuit of international acceptance among like-minded Western advanced neo-liberal countries, on the one hand, and deep rooted path dependence concerning traditional social democratic and agrarian egalitarianism, on the other hand. This contradiction has made Finnish QAE policy and educational policy remarkably double-layered. In the state educational rhetoric, the neo-liberalist reform discourse has been in a hegemonic position while in implementation and at the local level a silent consensus exists, based on antipathy and resistance against some fundamental neoliberal doctrines, first of all against ranking lists. Briefly, certain contingent factors supported embedded egalitarianism and embanked travelling market-liberalism.

Bringing the concepts of path dependence and contingency together, does assist us, at least in part, in understanding the persistence and toughness of this poorly articulated, silent national consensus that has shown its stubborn power where the municipalities have restrained themselves from implementing studies that could be used to create school based ranking lists. Here we must remark that this treatment does not underestimate the importance of agency. Accepting a certain randomness in life does *not* lead to the abandonment of a certain amount of freedom for the actors, rather the contrary (see, e.g. Simola & Rinne, 2015).

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Chapter 9
Evidence and Accountability in Icelandic Education – An Historical Perspective?

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Abstract Accountability and evidence play a prominent role in modern educational discourse. Against the background of the rapidly changing culture relating to the formation of our current education system, the question arises if this process might be a modern trend, possibly influenced by neo-liberal rhetoric and new public management. We consider three points in the history of education in Iceland (including the present) and find that some of the current emphases existed before but in a different guise. We find ambitious attempts to inspect the education undertaken by thoroughly gauging the teaching practices and the reading performance of the young people, driven by a desire to provide good education. These practices reflected accountability and acknowledged the need to collect a variety of evidence. Both the rationale and the methods applied seem to show an important affinity with the current endeavors and thus the current situation is less new than might be expected in view of the modern discourses, and the current policy and its implementation. We look for the source of influences and only in the first period considered was there a clear Nordic influence. In the latter two cases, we attribute the influence to other sources.

Keywords Evidence · External evaluation · Accountability

Introduction

As discussed in Chap. 4, Iceland was a part of Denmark until the first half of the twentieth century, but was in many ways treated as loosely connected, e.g., in the field of education. Thus, the Icelandic educational system did not follow the evolution of the Danish system in the eighteenth and nineteenth centuries. This becomes particularly clear when comparing the statutes and accountability

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mechanisms in Denmark (Ydesen & Andreasen, 2014) and in Iceland (Guttormsson, 2008a). The general influence was, however, the same. A surprisingly well-developed notion of accountability was an underlying feature of early action, developed by the Pietist church. This included the use of inspection and testing. In Iceland this lasted in one form or another into the twentieth century and both these aspects of the accountability mechanisms have been a part of the Icelandic discourse right up to 2020. We will gauge the development and character of these tools, used to ensure quality education and explore to what extent we see a clear evidence of Nordic or other influence. The focus of this exploration will be on evidence and action. We also endeavor to make the point that a historical perspective on the development over recent decades is crucial when attempting to understand the nature of the accountability efforts during the last few decades. We distinguish on the one hand between the basic principles behind attempts to ensure quality education, which we argue are fairly stable, and on the other, the very different discourses, which come from different directions, that shape the approach during each time period. Before we discuss the twenty-first century, where we start in the 1990s, as the present accountability movement took off, we discuss two major earlier efforts. Therefore, our approach will be historical to a considerable extent as this enables us to assess what is special and novel about the current push for evidence. There is no attempt made in this paper to examine the apparent substantial influence of modern rhetoric on education, such as neo-liberal ideas or new public management. Our focus is narrowly on the issue of accountability and evidence with the distribution of responsibility also in the background.

Three Important Purposes of Evidence Use in Education

The current debate on the importance of data and the emphasis on evidence is emerging as new, modern and exciting (Jónasson, 2019), and turns out to be closely interwoven with policy and practice, in particular with the idea of accountability. However, when we look more closely, this connection is not so new. It is recurring and based on clear principles of care and responsibility and the demand of professionalism (which implies delegation of action and responsibility). The emphasis on evidence has grown and faded again in certain periods, partly because the arguments have already served their purpose or have not worked. What is particularly interesting is that the rhetoric surrounding evidence has sounded quite a different tune in different periods. That is why we will visit the previous arguments and actions and allow them to enlighten us in the current situation. We are inspired by historians of education, in particular Tyack and Cuban's (1995) exploration of the development of US education throughout the twentieth century.

Within the Icelandic educational discourse, the debate on evidence has three strands. The first refers to *accountability*. This involves assembling evidence to ensure that a system is functioning and upholding necessary standards, essentially defined by those in charge. Accountability requires that various kinds of data are

collected to evaluate input and output in order to demonstrate a well performing system or to discover where its weaknesses lie. Student performance, a crucial ingredient of the first strand, has also been used for *tracking* purposes, which we classify as the second strand. Tracking played an important part in the Icelandic system for the best part of the twentieth century, even though it became steadily less important, as we moved towards its close and will be marginal in our discussion. The third strand is the process of using evidence for *formative purposes*, i.e., mainly to guide student learning, but has not obtained the same status as the accountability strand. Here the focus is on the direction students are given, based on an analysis of their performance (Jónsson, Smith, & Geirsdóttir, 2018).[1] With reference to whole systems, the first strand is dominating, as opposed to the use of evidence to guide learning of individual students, even though the latter gradually seems to gain strength.

Evidence, Accountability and Tests in Icelandic Schools

Many types of data are used for evaluation purposes within the compulsory school system in Iceland, and come from an increasing number of sources, most of which are domestic. We have good access to indicators accumulated by Statistics Iceland. Moreover, a fairly well developed system of internal evaluation is in place, which relies on various data. These are, *inter alia*, tests and various other data constructed and collected by individual schools or teachers and the national tests, administered to students in grades 4, 7 and 9. Regular questionnaires to students, parents and teachers are conducted in compulsory schools as part of the internal evaluation system, mostly delivered by *Skólapúlsinn*, a privately owned data collector. Some municipalities or individual schools use other tools, some are homemade. The system of external evaluation is gradually developing (Ólafsdóttir, 2016) and is based on data from the internal evaluation, existing documents, interviews and *in situ* observations. In addition, various diagnostic tests are used (Sverrisdóttir et al., 2020) to find students with learning difficulties. Some are used by the teachers (e.g. reading related tests) and some by professionals who work with various expert services or within the schools. The PISA results are by far the most prominent of currently used international data and they have influenced Icelandic educational debate since PISA started. There are also the TALIS data and the indicators provided by Eurydice.

It is relevant to distinguish between input data, which describes what goes into the system, and output data, i.e. what comes out in terms of student gain from the educational process. Those two categories are tightly interwoven, especially when the main concern is quality of education. Then the output often becomes the primary

[1] The most recent term for formative assessment “leiðsagnarmat”, was used in the 1990s, but became frequently used in the public and academic Icelandic debate only after 2000 (based on search on the digital library “timarit.is”).

indicator of the sufficiency or quality of the input. Historically, the educational output, notably the ability of children to read, was primarily used to assess the input, i.e., how the families or the clergy or the teachers performed their duties. On this basis, strand one, accountability, for a long time dominated the other two, and apparently still does.

Accountability – And Evaluation in Icelandic Education

Here we focus on different historical periods and perspectives with the aim of shedding light on the development of accountability mechanisms. We will begin with a discussion of the Harboe inspection in the 1740s. Next, we turn to the school and study inspection period in the 1930s. We then briefly examine the status and use of national tests within compulsory education from the 1970s to the early 1990s, during which the accountability became temporarily less emphasized, and tracking largely disappeared. We then proceed to the last three decades. We will gloss over a host of interesting and important developments and details in the evidence and accountability arena (Proppé, 1999).

The Harboe Inspection

Icelandic education was in the hands of families and the clergy for many centuries and the authority's emphasis was religious education. The attention paid to education of the young gradually increased, but very slowly through the centuries. Inspections, e.g. the visitatores in 1307, which led to the defrocking of some priests and edicts, in particular on confirmation, in 1635, bear witness to some concern for education (Sigurðsson, 1842/1994). It is clear, however, that only occasionally was Iceland in synchrony with our governing partner Denmark (Guttormsson, 2008a, pp. 75–89) and to a limited extent (see on the developments in Denmark, Ydesen & Andreasen, 2014).

Under the influence of the Pietist movement, a major effort was made to ensure that Icelandic children, boys and girls equally, were taught to read. The Harboe mission (1741–1745) is perhaps the most thorough, and truly external, evaluation of Icelandic education ever undertaken. Harboe and his associates travelled most of the country and checked the knowledge, attitudes and general competence of priests and the reading proficiency and knowledge of youths aged between 12 and 17 years (Guttormsson, 2000, 2008c). This was a serious and ambitious evaluation project and was well known among the lay people and it led to interest in establishing schools (which had at best a minor effect) and providing teaching materials. Moreover, a number of progressive edicts were issued and the accountability of families and the clergy were clarified in the process. There was also a shift in governance, as more authority was transferred to the secular heads from the bishops

(Jóhannesson, 1945). There is no doubt that matters did improve in the following decades and it seems that this progress was, at least partly, attributable to the evaluation process and the subsequent action. A number of other developments were, of course, taking place during the same period and some (perhaps much) of what Harboe intended to happen, did not transpire (Ólason & Jóhannesson, 1943). Even though the output variables, reading proficiency and knowledge of the young, counted as major indicators in the process, extensive observations and discussions, especially concerning the state of the clergy also took place. The effort was about quality, responsibility, and thus governance; what facilities and competences were required and who should be accountable. There is no question that an ambitious and competent external evaluation had taken place and the authorities took (some) subsequent action to improve things.

Evaluation for Equity in the 1930s and 1940s

Iceland underwent gradual urbanization during the first part of the twentieth century, and concurrently the value of education was increasingly being recognized by the people at large. The country was, nonetheless, still a rural country and many children received little education and often in home-schooling settings, taught by teachers who travelled between farms (Guttormsson, 1992). In 1918, 48% of school age children were in these loose school settings, compared to 39% in 1928. There were, in the early decades, two merging currents of thought gaining momentum, with respect to the development of education. A growing impatience with the unequal educational conditions in the country and a very strong argument for using transparent fair testing procedures, *inter alia* to demonstrate the apparent inequality. The latter showed a clear US influence on the educational discourse through Steingrímur Arason (Indriðadóttir, 1995), studying at Columbia University, who emphasized written and preferably national tests.

The massive effort developing to enhance the quality of Icelandic compulsory education in the 1920s was partly driven by teachers who demanded fairness and equal provision for all children. This included at least four lines of action (Guttormsson, 1992, 2008d). The first was to strengthen the responsibility of the central government to take action by expanding the inspection role of the National Education Director's office (Lög um fræðslumálastjórn, No. 474/1930). An educational board was also appointed, tasked with deliberating on the curriculum for compulsory education, among other things. The second was to clarify the responsibility of the school districts around the country. The third was to appoint a number of inspectors, who were normally well respected teachers. Their role included visits to each school district once a year as well as sketching reports intended for the authorities. The fourth was to administer a number of national (written) tests, see Table 9.1.

The idea is reminiscent of the Harboe effort nearly two centuries earlier, now of course with a modern twist and with more subjects than reading. The output

Table 9.1 List of subjects tested nationally 1929–1937. 7–14, 12–14 and 10–14 refers to the age range of the children tested

Year (spring)	1929	1930	1931	1932	1933	1934	1935	1936	1937
Vocal reading		7–14			7–14	7–14	7–14	7–14	X
Silent reading					10–14	10–14			10–14
Spelling	10–14					F			
Writing	10–14								10–14
Arithmetic	10–14				10–14	10–14	10–14	10–14	10–14
Grammar		12–14				F			
Essay writing						F			
Geography					F				
Natural history					F				
History					F				

F refers to the final examination in these subjects, normally when the children were 14 years old. After 1937, only reading and arithmetic were tested nationally. A massive inspection effort during 1931 and 1932 replaced any national tests during that period. (JTJ, based on reports written by Bjarni M. Jónsson)

measure, i.e. the student performance, was again central to the effort and also the teaching, but the facilities were now also perceived as important. Moreover, it became increasingly clear that the intention was to ensure the equality of opportunities, not least with regard to where people lived and thus forms of schooling. The form varied greatly between sparsely populated areas, villages and towns. In the adopted arrangement all pupils were offered the same tests, and the marking should not be swayed by any potential teacher bias. Table 9.1 shows the testing effort that was set in motion, but also partly indicates its fading, even though the financing of the inspectors faded sooner.

The inspector system was dismantled for financial reasons – but was soon revived in a much weaker form, and some of the tests are still in place. There is, however, no doubt that the original plan was very ambitious and extensive. Apparently, it had many of the features of our modern external evaluation system, which we would characterize as soft governance, with no high stakes, as it was not punitive in any way, and the inspectors, who were respected teachers, clearly had a formative role.

National Tests 1974–2020

The testing mechanism established during the 1930s was retained to some extent until 1974 (Proppé, 1999; Sverrisdóttir et al., 2020). Given the original intention, which was primarily to observe the quality of input, summative data was sufficient. It is also noteworthy that the explicit inspection role weakened as the school system continued to develop, but the tests remained in place and gradually acquired a tracking or sorting role, which was largely removed in 1974. However, the tests still kept their place in the 1974 law and a new official role emerged, but not very clearly, i.e., to make the tests serve a more formative function. Now, some decades later, we still

seem to be moving, but slowly in that direction. A recent extensive study on various aspects of compulsory education is, however, not conclusive on this score, even though the ways in which teachers assess pupils seem to be quite varied (Sigurgeirsson, Björnsdóttir, Óskarsdóttir, & Jónsdóttir, 2014). Thus, we still have the interesting situation that much data is collected in the school system, in a variety of ways, with little evidence available about its actual use or usefulness.

Table 9.2 shows the proportion (%) of students taking the national tests, some of which could be opted for or were voluntary as the grade 10 tests were optional between 2000 and 2007. The table is meant to indicate three things. First, even though both the number and formal status of the tests oscillated (Sverrisdóttir et al., 2020), their presence persisted. Secondly, that the proportion of students taking the tests towards the end of compulsory school did not vary depending on the formal status of the tests. The stakes were essentially low throughout the whole period, even though their value for selecting schools or tracks in upper secondary education persisted and was important for some students. Thirdly, the assessment in grades 4 and 7 was introduced partly for ensuring school quality, but still mainly for formative use by teachers and schools (Ministry of Education, Science and Culture (hereafter MoESC, 1998).

During the last decade of the twentieth century there was a revival of the previous emphasis on quality through evaluation. Even though testing was important and introduced for the early and middle classes in the compulsory school (see Table 9.2), it was not a major priority. Rather, testing consisted primarily of internal evaluation by the schools themselves and then external evaluation of schools that was introduced by law in 1995 (see further discussion in Chap. 4).

As noted above, it is not clear to what extent the national tests, or any tests, are pointedly used for a formative purpose vis-à-vis individual students, but it probably varies among schools and teachers. However, there are indications that they have directly influenced the general curriculum approach in the final classes of compulsory school in the subjects tested (Sigþórsson, 2008; Þráinsdóttir, 2010).

Accountability, Evaluation and International Comparisons in the 1990s – The Initial Steps

In the 1990s, at least three important developments affected the educational discourse in Iceland. First was the development of international and ostensibly coordinated tests (now PISA, see Sellar, Rutkowski, & Thompson, 2017), that (finally) allowed (or at least invited) comparison between countries. The second is the gradual emergence of a neo-liberal rhetoric connected to education, which has influenced education in various ways, both globally as well as in Iceland (Dýrfjörð, 2011; Magnúsdóttir, 2013; Skúlason, 2008). The third relates to the older, but increasingly accepted notion that education should mainly serve the build-up of a powerful economy (e.g. Brown, Lauder, Ashton, Yingje, & Vincent-Lancrin, 2008). The tests together with the competitive element of the neo-liberal ideology created

Table 9.2 The percentage of students who took the national tests in the period between 1977 (when the 1974 act came into effect) and 2018

National, coordinated tests 1977-2019. Tests that were in 10th class until 2016, were moved to 9th class. The formal requirement to sit the tests varied between periods

		1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
10th class	Icelandic	91	92	92	91	92	91	92	90	91	90	94	92		95	95			95	96	98	96	97	97	96	96	94	97	96	97	97	96		89	93	92	91	90	90	90	90			
	Mathematics	91	92	91	91	92	91	93	90	91	90	94	91		95	95			96	96	99	97	97	96	96	96	94	95	96	96	96	96		90	89	91	89	89	89	88	89			
	English	91	62	58	54	92	92	92	90	91	89	95	92						95	95	99	96	97	96	96	95	94	96	96	96	96	97		89	90	91	89	88	88	88	89			
	Danish+		29	33	37	91	90	91	88	90	88	92	90						93	95	96	95	96	95	95	92	87	85	85	78	77	75												
	Natural history	40	46	45	44																						69	69	65	58	55	53												
	Social studies	50	45	45	46																							63	58	49	43	40												
9th class	Icelandic																																							88		90	89
	Mathematics																																							88		88	87
	English																																							89	90	88	87
7th class	Icelandic																				96	97	97	96	97	96	95	93	93	95	92	92	93	91	93	92	92	92	90	91	90	91	90	90
	Mathematics																				97	97	98	97	97	96	96	94	94	95	95	93	93	92	93	93	92	92	90	91	91	91	91	91
4th class	Icelandic																				97	96	96	96	96	94	95	92	92	94	90	89	90	90	92	91	91	91	89	91	91	90	90	91
	Mathematics																				97	97	97	96	96	95	95	93	93	94	94	93	92	91	92	92	93	92	91	92	92	92	91	92

Number show the % of students taking the examination, including those reported ill or being formally excempt (missing cells are due to lack of data or tests not held).
Based on Jónasson, J. T. (2008a, p. 232) and communication from the Directorate of Education in May 2020.

the grounds for an international competition in which states sought to prove who could produce the most economically proficient citizenry.

As a precursor to the PISA study, the first international study that Iceland participated in was the 1991 IEA study on reading skills (Elley, 1994). In all, 32 countries took part and it was interesting that already here the primary comparison in Iceland was with the Nordic countries. For the nine-year-olds, Iceland underperformed compared to the other Nordic countries. The Minister of Education commented on the results, in response to some critical comments. He stated that the Nordic countries set the bar for any meaningful comparison and noted further that even though the nine-year-old children did relatively badly in the test, the same did not apply to the 14-year-olds. Actually, they came on top of the 32 countries, in the part on expository text (Einarsson, 1992; Valgeirsdóttir, 1997). Following the IEA study, Iceland participated in PIRLS in 2001 and 2006 (Jónasson, 2008b). Iceland did comparatively well in those and there was seemingly little debate or discussion about PIRLS among the general public, policy makers, or academics.

Iceland participated in the 1994/1995 TIMSS study and those results had influence on the policy discourse and the general education debate. Public dispute arose on teachers' education, school development, curriculum, and study material in mathematics and the natural sciences, as Icelandic children did rather poorly in the study (e.g. Aðalsteinsdóttir, 2007; Diego, 1997). The debate centered on the need for better preparation of teachers, both in terms of the length of the teacher education program and the contents of it, as argued by e.g. leaders of teacher education institutions and the teachers' union. Other points of view were discussed, such as implementing a performance related wage system for teachers, and the need to again track students based on their grades. According to Aðalsteinsdóttir (2007), no actual formal work was done to explore and contemplate the evidence provided by the results of TIMSS. Even so, TIMSS had considerable impact on curriculum-making in Iceland. Indeed, Jónasson (2008b) has argued that no other international study had at that point generated as much direct impact on curriculum-making in Iceland and Sigþórsson (2008) indicates that considerable changes were made to mathematics and natural science curriculum and teaching materials in the aftermath of TIMSS. Furthermore, Bjarnason (1998), who was the Minister of Education at the time, stated that the curriculum in mathematics was being revised to respond to the poor TIMSS results. All this would indicate the social technological influences of international organizations.

A Variety of Evaluations and Reform Discourses

In the above, we have emphasized formal evaluations of the system and the use of testing, some of which are leftovers from the earlier evaluation efforts. There have been numerous other evaluations, notably by OECD in 1986 (OECD, 1987), which was an external evaluation of the complete educational system, with recommendations, based on interviews and visits, but not of the scale of the previous major

evaluations. There have also been several evaluations focusing on specific aspects of Icelandic education at the national level, such as of mathematics education (Þórðardóttir & Hermannsson, 2012), and Icelandic (Sverrisdóttir & Valsdóttir, 2012). Perhaps the most ambitious of those was an extensive evaluation of arts and crafts teaching, conducted by Anne Bamford (2011) in 2008/2009. It is very difficult to figure out the impact of these evaluations, except the last noted, which apparently has not been attended to yet. In regular OECD reports on the Icelandic economy, there are often chapters on education, which could thus be classified as an indirect external evaluation of the system located at the national level (e.g. OECD, 2019, see thematic chapters).

The Second Decade of the Twenty-First Century – Moving Towards 2020

Since the first PISA assessment in 2000, Icelandic students have scored lower in reading literacy each time, except in 2009 (Directorate of Education, 2019, Fig. 1.1). The results usually generate considerable debate (though normally temporary) about education and the quality of the Icelandic school system. Comparison to results from the other Nordic countries is always prominent and usually dominates the discussion, at least when the results are presented and sometimes when norms are considered, e.g. when it is suggested that study hours in Icelandic should be increased in accordance with the mother tongue curriculum in other Nordic countries (Directorate of Education, 2019; MoESC, 2011, 2014).

The White Paper published by the MoESC (2014) was substantially and explicitly influenced by the PISA results. One of the main initiatives introduced in the paper was a literacy project, whose importance was underscored by OECD's international comparison (MoESC, 2014). Consequently, a long-term, national agreement on literacy was signed by the Minister of Education, the Association of Municipalities and Home and School – the National Parents Association. The project received considerable funding from the state's budget and involved *inter alia* more emphasis on regular testing throughout the compulsory school level and extensive literacy counselling services located at and coordinated by the Directorate of Education. The main aim of the project, according to the White Paper, was that at least 90% of Icelandic students would reach level 3 in PISA reading literacy, from 79% in PISA 2012. The score was 78% in PISA 2015 and in PISA 2018 it was 74% (Directorate of Education, 2019, Fig. 1.2). Thus there is some way to go.

In addition to partaking in PISA, Iceland participated in TALIS in 2008, 2013 and 2018. The results have, for example, shown that Icelandic teachers receive comparatively little formal feedback on their work, which has been used as an argument for a greater emphasis and structuring of external evaluation of compulsory schools. Results from TALIS have also been used to rationalize the lengthening of the teacher education programs (MoESC, 2016). Further, in a report on teacher professional

development, the authors repeatedly use the TALIS surveys to underpin their deliberations (MoESC, 2019).

In addition to literacy, inclusion is a major issue in Icelandic education. The inclusion discourse has taken on many guises for well over a century (Jónasson, 2008c). It started with a focus on special groups, e.g. deaf and blind children, and then gradually included children with learning or behavior problems. The law set in 1946 for primary education asserted that everybody had a right to education, but some in special institutions. An inclusive step was taken with the law in 1974, but it needed a real push, which arrived in the form of government regulations in 1991. Even so, inclusion is still a contended issue, both inside and outside the school system (Magnúsdóttir, 2016; Marinósson & Bjarnason, 2014; Sigurðardóttir, Guðjónsdóttir, & Karlsdóttir, 2014). An evaluation was undertaken by the European Agency for Special Needs and Inclusive Education (2017), with extensive consultation, and came up with a number of recommendations. Among the conclusions was that the notion of inclusion was very unclear within the education system and thus takes on the status of a floating signifier (Krejsler, 2017), which is problematic, as these issues would benefit from firm understanding and action. The government is currently working on plans to respond to the recommendations (see MoESC, 2019), but it is still unclear how this will play out in the long run. It is most noteworthy how the evaluation part of this discourse has remained totally outside the regime or culture created by OECD or PISA.

The Use of Research

In recent decades, there have been a growing number of research projects that have looked at various aspects of the conduct of education. A number of national and large-scale international research projects have been undertaken, e.g. on compulsory school practices (Óskarsdóttir, 2014), diversity and social justice in education (Lefever & Ragnarsdóttir, 2018), Icelandic language education (Jónsson & Angantýsson, 2018), and upper secondary school practices (Óskarsdóttir, 2018). Large scale national studies have been carried out regularly on student well-being, in particular by Rannsóknir and Greining (n.d.). Iceland has also participated in an international study monitoring health and behavior in school-aged children (HBSC) (e.g. Arnarsson, 2019). In the last 15 years, a great number of PhD studies have been undertaken on education and hundreds of master's thesis targeting all school levels, many of which contain evaluative or potentially formative material. The available evidence does not indicate that research is much used in policy making or action (Ragnarsdóttir, Jóhannesson, Jónasson, & Halldórsdóttir, 2020). Despite a large majority of those involved coming from the educational field, either in the education system or are engaged in educating the professionals, there is possibly a challenging disconnection between the worlds of research and practice.

A Return to the Question of Influence in an Evidence-Based World

We have noted the clear rhetorical emphasis on the use of evidence within the Icelandic educational arena. We have highlighted this by exploring several different arenas, which all point in the same direction.

For many decades, data on various aspects of the education system have been accumulated and published by Statistics Iceland. These show e.g., the growth of the system in terms of student numbers, the money spent per pupil, the number of teachers, the number of pupils with foreign background or how many opt for vocational studies. Most of this data is essentially input data used to describe the system. There is also output data, e.g., indicating how many drop out of a certain level in the system or how many graduate. The data is readily accessible and often presented, but its actual utility in underpinning change is rarely transparent, even though its descriptive use is clear. It is normally output data that is used to rationalize that action is needed, e.g. test scores or dropout, but input data occasionally used to justify its direction, e.g., the number of hours used to teach the mother tongue are relatively few compared to those in other countries rates (MoESC, 2014). Moving away from the statistical indicators, there are the national test data for grades 4, 7 and 9 in the compulsory school, which is meant to inform the pupils and their parents, the teachers of course, but also the school leadership, as well as the municipalities about the pupils' performance. This is supposed to guide their actions, but the extent to which this is used is not clear. In addition, there is various performance evidence produced by individual teachers to their students (see above). As far as individual students are concerned, tracking has largely disappeared and those arguing for a policy on individualized teaching and inclusion have for a number of decades promoted the idea of using tests and other student data for individualized formative purposes.

Thus data, but mainly output data is meant to underpin action. Both the national indicators and the national tests have a clear institutional base, i.e., Statistics Iceland and the Directorate of Education. This indicates that the attention paid to data, and its use as evidence, is apparently gradually growing in the Icelandic educational culture. When we add to this the various data collected for the sake of internal and external evaluation of schools, and domestic research on youth and education, in addition to data collected by individual teachers as discussed above, we start to glimpse a stronger image of how Icelandic data on education is structured.

The international part is no less important as it seems to be a driver for change. Iceland, now increasingly, ensures that data on all aspects of the education system, required by UNESCO and Eurydice, is supplied in order to allow comparison with other countries. We have already mentioned participation in international assessment, of which PISA is the dominant one. The White Paper published in 2014, based its goals largely on international data (MoESC, 2014), partly from PISA studies. Thus, the international participation and influence is apparently strong and here we intend to explore it further.

Nordic or Other Influences on Icelandic Education

In order to understand the trends and fluctuations in the use of evidence, we search for indications of external influence, in the educational arena, in particular from the Nordic countries. From the discussion in Chap. 4, there is an obvious and natural Danish influence in Iceland, even though it is not always as strong as might be expected on the basis of the close historical ties between the two countries (which were for a long time the same country). The history of Iceland shows multifaceted and close ties with all the Nordic countries over the last two centuries, where the recent ties are perhaps best symbolized by the establishment of the Nordic council in 1952 (with Finland joining in 1955). But that only tells a very small part of the story. The Nordic communication has existed on multiple levels, but the extent has not been mapped by research, at least not in the arena of education. There are, however, numerous indications that the Nordic interaction continued to grow in various directions toward the latter part of the twentieth century and into the 21st. In order to obtain an overview of the development of the relationship in the recent decades it may be relevant to focus briefly on different, but overlapping arenas.

We suggest four spheres or arenas for Nordic communication and their influence on Icelandic education, even if we are not able here to disentangle the influences for the different levels of education. Neither does this analysis determine or even indicate what the impact is in terms of practices or policies. But we presume it is substantial in some cases. These spheres are: The national policy arena, which perhaps normally receives the most attention; the administrative arena, involving administrators, also at various levels within the systems; the practical arena, including meetings of practitioners, also at various levels in the systems; and finally the scientific sphere, including academics attending conferences, publishing papers in journals and networking.

In the *policy* arena, there are principally three related categories of operation. One is the annual Nordic Council meetings among members of parliament from all the Nordic countries. The second is under the umbrella term of the Nordic Council of Ministers, where an elaborative infrastructure has been set up and reaches, *inter alia*, all levels of education. The third, is the Nordic cooperation at the international level, such as within the OECD and UNESCO, but also with various other agencies. In the *administrative* arena, often closely connected to the policy arena, there are meetings at various levels. Administrators at the ministries meet regularly, and so do those at special governmental agencies, such as the Directorates of Education. The education officers within municipal administration meet and there are also regular meetings of the teacher unions. In addition, there are various *ad hoc* groups. In the more *practically oriented* arenas, there are nearly 400 Nordplus programs initiated every year, with probably half related to compulsory education. The programs support various activities, such as visits and Nordic conferences with a practical orientation. Iceland is an active partner in both types of projects. In the *scientific* or academic arena, there are the conferences (e.g. NERA and Northern lights), journals and networks. Searching the internet, we find over twenty regularly held Nordic

conferences (held every year, or every second or third year) within various fields of education. Similarly, at least twenty educational journals have the term Nordic or Scandinavian (2) in their title. There are several research projects conducted within the Nordforsk framework (e.g. within the Education for Tomorrow Program). Iceland participates actively within all the four arenas.

The point is that when we start to describe and analyze the visible and formal ties, and attribute influence, as shown by formal acknowledgement, in documentation or in line with certain formulations, we have to deal with three types of problems. One problem is that the underlying principles, e.g. of a program of evaluation and quality control can harmonize with different rhetorical or political discourses. That does, however, not necessarily imply that the discourses directly influence the programs. The causal relationship may be difficult to establish. The second is, as has been implied above, that the developments may be influenced by a host of interactions that are not clearly visible, especially not if we look primarily at the policy level and neglect the plethora of other levels of active interactions. Such negligence may leads us to undervalue the very substantial other ties that are not formalized within a national institutional structure. Thirdly, it may be difficult to establish what changes, planned by policy did in fact materialize in the end, and which of those changes that did take place, were largely in line with long-term underlying developments, no less than expressed policy.

Connections and Influences of International Organizations

Alongside strong Nordic influences, robust ties have been forged with international agencies, particularly the OECD and the EU (through EEA). At the same time, the Nordic countries are also important participants in both organizations and may often have considerable influence, sometimes successfully promoting coordinated views. This may also hold for other important organizations, such as the Council of Europe. Such influences may be difficult to evaluate, even when they are considerable. Here, we mention three examples of policy changes that have explicitly been influenced by international forces.

First, we note the explicit influences from the OECD, which are usually grounded in large scale indicators and comparison between nation states. Iceland has submitted data on education for publication in reports and comparisons by the OECD, such as Education at a Glance, since 1996. The comparison published in these reports have been used in arguments for greater financial contributions to the education system, and influenced discussion on forms of operation of schools and the content of the mathematics curriculum, to name some. Several suggestions from an OECD report from 1986 (Jónasson, 2008b, p. 266) have been implemented (some only several years later), such as making the first year of primary school obligatory, adding time to teacher education, and shortening the length of studies, leading to matriculation in upper secondary education. It may still be problematic to pinpoint the exact causal links.

Secondly, discussion about the aims and policies of UNESCO have been included in Icelandic educational journals since the foundation of UNESCO (Halldórsson, 1947). Those messages have not translated directly into policymaking and mainstream practices but recently, following the approval of the Sustainable Development Goals, UNESCO seems to have gained a stronger influence in Iceland as the Government has adopted several priority targets for implementation (Sustainable Development Goals, n.d.). A few compulsory and upper secondary schools have qualified as UNESCO schools (UNA Iceland, n.d.).

Thirdly, some European influences are visible in recent policy changes in Iceland, at all school levels. The government has worked towards identifying a National Qualification Framework (NQF) for all school levels, compatible with the European Qualifications Framework (EQF). Also, the European discourse includes eight key competences for life-long learning, some of which have been included in the Icelandic curriculum formulation (e.g. visible in MoESC, 2013).

Exploring Nordic influence on Icelandic culture, and education in particular, is a fascinating project because it is so multifaceted, and the results are in many ways paradoxical. From one perspective there is a wide-reaching interaction, but at the same time the visible influence is less than this might indicate. A large part of the problem is that some of the potentially most interesting influences occur under the surface and their actual impact is therefore difficult to assert. The main conclusions of our exploration are fourfold. The first is that our education system is by descent a Nordic system. Right up to the present moment, the Nordic legacy, influence and connections can be found practically everywhere. In the current PISA discourse, it has been suggested, for example, that we assimilate ideas from the Swedish project *Matematiklyftet* (Directorate of Education, 2019, p. 81). Secondly, in some important ways we have developed differently simply due to geographical and cultural differences, but that applies by no means to all parts of the intricate educational process. Thirdly, there have been quite substantial and visible influences from elsewhere, as discussed above. The fourth conclusion is that the influences depend very much on where one looks, i.e. at policy (e.g. inclusion or tracking) or rhetoric; at system issues or at the school level, curricular or pedagogical issues, where one finds clear signs of influence.

To conclude, from the Icelandic perspective, the inspection and evaluation of Icelandic education, especially in the 18th and 19th centuries, were simply Danish procedures adapted to the local setting. It is rather obvious that the *modus operandi* of our schools was Danish even though deliberations about education became Icelandic (i.e. as of an independent state), even while we were a part of Denmark (Briem, 1900, 1901; Guttormsson, 2008b; Sigurðsson, 1842/1994). Nevertheless, the evaluation and inspection regime engineered in the 1920s and 30s, came as much from the US, in particular the institution of inspectors and the use of written tests. The essence of the task was nevertheless very similar to what it had been before. The third wave of formal evaluation that we saw originating in the 1990s, did not come from the Nordic countries, but from the OECD, and OECD countries that were strong on inspection and tests.

Discussion

Governments often act responsibly (also the Danish monarch). They also understand, based on an ongoing discourse, that education is important and it is partly (or wholly) their responsibility to ensure high quality for every pupil (which is perhaps still the most important feature of Nordic educational thinking). The Nordic governments have on the whole, at least up to the twenty-first century, not taken the view that the market will ensure quality education and thus they have instituted an inspection mechanism of the public system that keeps its performance in check. We have noted three essentially similar efforts in Iceland, far apart in time, with essentially the same ingredients, but with different rhetoric and operational rationale.

Returning to the Question of the Impact of Evidence on Policy

We have touched on this crucial issue but cannot really tackle it, mainly because the relevant evidence is not available. This is the question of the use of data in the actual implementation of policy or other guided action (Ball, Maguire, & Braun, 2012; Coburn, 2004). There are ample cases which show that a policy was formed on the basis of inspection, but there is little formal evaluation available of the direct and exclusive long-term impact. A system is always developing and changes may take place in line with intended policy action, but might have taken place anyway. Methodological constraints may thus hamper attributions to the evidence based policy in question.

The main responses visible are those that stem from demands that action should be taken, something needs to be done. The extent to which the focus through the centuries is on reading is interesting (and understandable). This was the chief concern in the 1740s and clearly in the 1930s and is a priority in the twenty-first century. In all cases the evaluations or results have produced lively and possibly very important debates, but whether the extent of these or the policies that emerged had an overriding or a long-lasting effect in the classroom has not been established.

The Nordic and International Connections

We have indicated that the numerous and multifaceted Nordic connections work at many levels, and are often only visible at very close quarters. There is no doubt that the basic characteristics of the Icelandic school system are Nordic (Danish), but the system development and details are different in many ways. There are probably four main reasons for this. First, the conditions in Iceland meant that the system started to develop much later than the other systems, and thus had a starting point in a cultural climate different to those that characterized the beginning in the other

countries, despite the close cultural and political ties. Secondly, the influence of the rural character of Icelandic society lasted long after the school system took off, which crucially affected its composition and development far into the twentieth century (Guttormsson, 2008a). Thirdly, while the system was being shaped, we received influence from outside the Nordic sphere; from other parts of Europe, and also from the US. The 1920s and 30s were an important formative period, when these influences had their effects. And fourthly, when we moved towards rethinking some of our *modus operandi* towards the end of the twentieth century, we had come under a strong influence of the OECD and also the neo-liberal turn, rather than looking mainly towards the Nordic countries (even though a similar rhetorical influence was seen there). Thus, in the developments in the later accountability and evaluation phases, we happened to take controlling mechanisms, at least to an important extent, from the US in the first half of the twentieth century, and we did not look to the Nordic countries when forming the last accountability phase in the 1990s and into the twenty-first century.

Having noted that our action plans do not necessarily stem from the Nordic countries, at least not in the accountability realm, it is clear that when we look for the rationale for improvement, we compare ourselves, practically exclusively, to the Nordic countries. In recent years, largely using data from PISA (see e.g., MoESC, 2014). This is also clearly evident in the Northern Lights conferences and in the parallel publications.

Three Emerging Questions

In our analysis, three important questions emerged. The first, which is implicit in our approach is to ask how novel the emphasis on data, evaluation, accountability, tests or other monitoring of student progress, truly is. We have shown that this is definitely not very new. A move towards district and school independence in the 1930s was very explicit and went hand in hand with demand for equality in delivery of education. It was therefore accompanied with a call for a measurement and inspection mechanism, which was set in motion at the time. Its major ingredients did, however, not last for much more than a decade (and for some parts much shorter), but given the difference in context, it was initially no less ambitious and extensive than what we have seen in recent years. The analysis of this period, from the perspective of evidence use, firmly suggests that when looking at development in education we have to take the long-term perspective, in order to understand both continuity and change.

The second question that emerged is about the use of all this evidence. How is it used? By whom? The implicit question is how useful it is to spend considerable resources on the collection and presentation of various types of evidence. It is always assumed, of course, by those responsible for the distribution of money, that evidence is important, even crucial, for developing education, in particular helping pupils to get the most out of their education. During both the 1930s and the recent

decades enormous amount of data, largely test data, has been collected. The actual use and influence for the development of education is, unfortunately, difficult to ascertain, in particular in the former period. But we suggested, that even though our educational facilities, professional knowledge and teaching and learning conditions have been constantly and ambitiously improved, we have little clear indication that the evidence accumulated played a substantial and specific role, except in the superficial (but admittedly important) way of spurring the actors on: we must do better. An interesting development in this connection deserves further study. As expertise and professionalism develops, it is possible that one sees different and relatively closed arenas of expertise forming. Noticeable examples would be experts analyzing the massive data available (e.g., test data), experts using diagnostic tests (e.g. psychologists or kindred professionals), the teachers who are directly responsible for internal evaluation, but perhaps most interestingly, the vast army of educational researchers at the universities and special research institutes. Some of these may have problems communicating the relevance of the evidence they accumulate to those who would benefit by taking it into account. All these groups are perhaps also hampered by their own lack of understanding that the material they have, gives far less direction for action than is thought to be implicit in the evidence collection exercise (Jónasson, 2019).

The third question is about the origin or roots of the notion of using evidence to enhance the quality of education and what mechanisms must be in place for it to work. Where do the ideas mainly stem from? Are we, in the field of Icelandic education, chiefly influenced by the other Nordic countries, e.g. because of close cultural bonds, or are we preoccupied with ideas from other directions? This turns out to be a very complex issue. It is clear that the Icelandic connection with these countries exists at many levels. It is definitely also within the policy arena, but several other arenas seem to be no less important when exploring the collaboration, cooperation or influence. Wherever we look, the connection to the Nordic countries seems to be strong. Nevertheless, focusing on the arena of evaluation and accountability, including testing, we have argued that both the initiative in the 1930s and in the recent decades was clearly much, if not dominantly, under the influence from other directions. Thus, to the extent that the Icelandic system of evaluation and testing may be similar to the other Nordic countries, it is still partly homemade, but also draws substantial influence from outside the Nordic countries.

Thus, we conclude, when the focus is on the use of evidence, in particular evaluation and testing, we are in many important ways moving towards the ambitious, accountability and testing mechanisms that were in place, for a while in the 1930s and 40s, and even much earlier. We also conclude that the Nordic influence, despite permeating all levels of our education enterprise, is not the major contributing factor to the way we construct our action plans for the collection of evidence as well as its use.

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Chapter 10
Governance Through Digital Formations – The Case of 'What Works' in a Norwegian Education Context

Ida M. Lunde and Ann Elisabeth Gunnulfsen

Abstract The Norwegian education system has experienced a shift from originally being strongly rooted in social democracy, equity and the welfare state, to being characterized by a focus on digitized data-work where the 'what works' agenda has become a pivotal matter. Digital technologies are now providers of evidence, and important to identify what best practice *is* and what it *should be*. This chapter reports on a sociomaterial analysis of in total four policy documents related to an upcoming national school reform in Norway. We treat the policy documents as 'windows' into the policy of digitization in Norwegian schools. The findings show an assemblage of heterogeneous actors that are to partake in digital practices in schools. By tracing their relations, we find that digital formations are potentially important actors in steering the governance of Norwegian schools. Findings also show that relations may be forged at school level. The authors discuss how the coming together of heterogeneous actors generate governable forms of digitization. In particular, the analysis of the assemblage shows that the relations provoke a governance agenda of quality assessment. The findings suggest further empirical research in schools to map school actors' knowledge of and practice with digital formations and its functions in governance.

Keywords Digital education governance · Digitization · Policy assemblage

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Introduction

Norway has an education system strongly rooted in social democracy, equity and the welfare state. Local teachers, school leaders and schools have had great autonomy and have been viewed as agents of the civic society, helping build the nation and shape the national identity as the country grew out of poverty and into prosperity in the nineteenth and twentieth century. The population in Norway has been and remains widely dispersed, paving the way for a regional and municipal policy dimension in education. Educational institutions in Norway operate on a national, regional, and municipal level where responsibility is shared among politicians, professional administrators and local schools.

As the wave of neo-liberalist influences hit Norway and other Nordic countries in the 1980s and 1990s, it was argued there was a need to ameliorate national and local education authorities to ensure more efficacy across all levels (Uljens, Møller, Ärlestig, & Frederiksen, 2013). The introduction of individualized and efficient public institutions gave rise to parental involvement in education, as well as a flattened municipal hierarchy. The inauguration of New Public Management (NPM) mechanisms and the launch of international testing such as the Programme for International Student Assessment (PISA) resulted in a shift in the Norwegian education system (Møller & Skedsmo, 2013). This shift is characterized by a strong focus on student outcomes and results, new assessment-and output-oriented policies; all features which gave fuel to the rise of student data. 'What works' became a matter of tracking student activity, from the earliest accounts of results in national testing to achievement of curriculum targets. Evidence-based research and effectiveness models that were highly influenced by the use of student data were, and continue to be, central sources of reference for educational policy makers in Norway (Baek et al., 2017).

A growing body of educational policy research has focused on the use of student data, especially highlighted by cases in Anglo-Saxon countries and within supranational institutions such as the European Union (EU). Some of these have displayed outcomes and strategies of data use in school inspections and within self-evaluations (Ozga, 2009; Ozga & Grek, 2012). Other studies show how multinational and supranational organizations, as well as the rise of 'edu-business', enable the collection, distribution and analysis of student data (e.g. Lawn & Grek, 2009; Pettersson, Popkewitz, & Lindblad, 2017; Souto-Otero & Beneito-Montagut, 2016). Although data undoubtedly has become eminent to a wide range of educational professionals, less attention has been paid to the digital initiatives that facilitate the process of accumulating data in regards to the matter of the 'what works' agenda in education.

Multinational organizations, 'edu-business', and national assessment systems undoubtedly enable the real-time and fast-pace collection of student data, however, the digitization and datafication of education governance (Williamson, 2017) is increasingly dependent on and being realized by complex entanglements of digital formations such as learning analytics, algorithms and visualizations. Digitization and datafication is in this sense an intertwined process of translating big data into

educational practices in a digital form (Williamson, 2017). This notion has consequences for a wide range of actors; students are increasingly having their every digital move traced by advanced data analytics that can visualize, assess and 'transform' their progress (Høvsgaard Maguire, 2019), parents are able to follow these developments through websites with school comparisons (Decuypere, Ceulemans, & Simons, 2013), and teachers and school leaders are expected to use digital data technologies to inform their own practice (Ottesen, 2018; Selwyn, 2016).

In Norway, educational policy research has also paid emphasis on the use of student data in particular to the National Quality Assessment System [NQAS] (Gunnulfsen & Møller, 2017; Skedsmo & Møller, 2016). Key to the NQAS is its focus on output-oriented and evidence-based policies (Skedsmo, 2009), often characterized by the collection, distribution and analysis of student data. Norwegian schools are expected to utilize data from the NQAS found on various platforms, software and test-practices to collect information, and to make decisions for future school development plans (NOU, 2015:8; Ottesen, 2018). In this sense, digital platforms and software have become a necessity in Norwegian schools in order to comply with governmental expectations of performance measurement. Digital technologies are now providers of evidence, and important actors in identifying what best practice *is* and what it *should be*. As such, we argue educational governance research should also be sensitive to the wide range of (digital) entities that facilitate governance mechanisms such as the collation of data.

Recent policy studies have moved beyond established conceptualizations of the 'doings' of policy to explain emerging governance mechanisms. Some of these studies have adopted sociomaterial approaches to theory and methodology. In particular, the sociomaterial concept of *policy assemblage* has surfaced in education policy research (Gorur, 2011; Youdell, 2015). In policy assemblage, the sociomateriality is treated as a *sensibility* to trace the process by which various elements come together in an assemblage, or a network (Savage, 2019). Studies that have investigated the emergence of digital formations in education find that relations between heterogeneous actors characterizes such networks (see for instance Landri, 2018). We build on this prior research to investigate how heterogeneous actors are assembled in Norwegian policy documents to fulfill governmental aims of digitization. We have analyzed in total four policy documents, all leading up to and related to the upcoming incremental school reform *Fagfornyelsen*. Researching assemblages through documentary analysis can reveal particular legitimations of thinking by working as 'windows' into the mobilization and application of component parts (Baker & McGuirk, 2017, p.434). The following research questions guide our analysis:

(i) What relations between heterogeneous actors form through the descriptions of digitization in the policy documents?
(ii) How do these relations shape policy intentions of the digitization in schools?

This chapter proceeds as follows: the phenomenon of digitization in a Norwegian context will first be presented. We will then frame the concept of policy assemblage, which serves as the analytical foci in our analysis. The methodology will then be

presented, before we outline the main findings of the analysis. Lastly, we will discuss some of the main findings before presenting concluding remarks with recommendations for future research.

Digitization and Big Data in Norwegian Education (Context)

The collection of data is not new, and has persisted in large parts of society for centuries. However, as new technological achievements and an increased interest in documenting precise, detailed and personalized information has augmented in the twentieth century, so has the techniques for collating data. Today, the collection of data transpires in large parts of our everyday-lives; from social media and commercial platforms, to wellbeing and fitness applications. The twenty-first century human is repeatedly exposed to the collection of data, and is constantly reminded as they enter unvisited webpages online as a result of the General Data Protection Regulation (GDPR). In education, this trend is best explained by the concept of Big Data (Williamson, 2017). Generally, big data refers to complex types of data analytics such as learning analytics, predictive analytics, and machine automation. These are comprised of data sets that have great *volume* (large in quantity), *velocity* (real-time and fast-paced), and *variety* (stem from different sources) (Kitchin & McArdle, 2016). However, big data often entails more; it is also *exhaustive* in scope, *relational*, *scaleable*, and carries *variability* (Kitchin & McArdle, 2016). Small data may hold some of the characteristics described above, however such data sets are always slow and one-sided in nature making triennial tests such as PISA questionable in terms of its fit with the concept of big data.

The digitization of education relies on big data in the translation process of practices into software and code (Williamson, 2017). Such practice can represent a wide range of mundane school practices (i.e. teaching, assessment), as well as governance mechanisms such as the 'what works' agenda. Making sense of databases comprised of big data is generally accomplished using software that has been coded to visually present and analyze the information. Software inherits the power to be selective; the information and data available on software and platforms are handpicked and tailored to fit the purposes an actor wishes to enlighten (Kitchin, 2014). Digital technologies enable evidence-based practices, and in Norway, this may imply a type of soft-governance that sets the 'what works' agenda for policy makers as well as for local school development. Big data and software will always be partial and selective; the question is on behalf of who or what such a bias stems from.

The digitization of education in Norway has developed rapidly from the beginning of the century. Early efforts include the focus on digital literacy within the Knowledge Promotion in 2006, and although this period was characterized by access, infrastructure and building teachers' ICT competence (Ottesen, 2013), it set the stage for further policy initiatives. Simultaneously, the NQAS was introduced in the aftermath of the first PISA results. Data provided within the NQAS includes national testing, self-evaluations, student surveys and publicly available statistics. It

also offers national and municipal authorities a way of measuring, coordinating and managing Norwegian education. The datasets within the NQAS can be accessed separately and directly from the source, however, the introduction of new assessment practices saw a rise in platforms that were able to assemble all the datasets in one place (Caspersen, Røe, Utvær, & Wendelborg, 2017). The company Conexus has worked on behalf of the Norwegian Ministry of Education and Research for over a decade and is a leading company in providing software with learning analytics in the Nordic countries (Conexus, 2020). From its outset, Conexus has offered several platforms that gather data from a variety of sources and visually present the data for teachers and school leaders. In Norway, some of these sources include results on national tests, student surveys, mapping tests and other subject-specific tests. Today, some of these assessments also include algorithmic thinking that allows the level of the test to change accordingly to how students answer (Høvsgaard Maguire, 2019). Through software like Conexus, students' performance is constantly being recorded to a meticulous level, all available and administrated within one place. Best practice and 'what works' is presented as desired outcomes, sometimes color-coded where red implies the need for immediate intervention.

In 2019, the Norwegian Directorate for Education and Training introduced the Value-Added-Indicator (VAI) – a measurement tool for schools and municipalities to estimate indicators of school contribution to students' achievement in Norway (Directorate for Education and Training, 2020). The VAI takes into account indicators for student performance such as earlier performance results, but also cross-sectional indicators such as family background (parents' education and income) and immigrant background. The results are publicly available online on the Directorate's webpage for quality assessment, Skoleporten, and are subject to comparison across municipalities. The concept of value added by schools resembles economic approaches used to express learning outcomes as school profit (Kirkebøen, Kotsadam, & Raaum, 2016). More than building on economic concepts from the private sector, however, is the VAI's potential to be scrutinized by digital means to enhance the 'what works' agenda. We may see a rise in digital technologies offering predictive analytics (such as in VAI) – a process grounded in complex forms of big data. Building on what *has been,* and what *is* to predict what *might be* is vital to predictive analysis, a process that has expanded in scope in several parts of the public sector, including education (Williamson, 2016).

Policy Assemblage

Key to sociomaterial approaches is that 'things' can be performative. While educational policy may include descriptions of curriculum texts, teaching material, and databases, educational research often neglects the performative contribution of these materials (Waltz, 2006). In sociomaterial approaches, both social (human beings, values, discourses) and material (i.e. texts, data, evaluation tools) entities are of equal importance, and neither are given importance over the other.

We use *policy assemblage* as an analytical concept in this chapter. Often, policy is examined by looking at individual component parts, and seen as something 'clear, abstract and fixed' (Ball, 1997, p.265). However, in a (digitized) world with complex human and non-human systems made up of sophisticated and versatile relations, assemblage thinking seeks to move away from conceptual abstractions of policy to shed light on how such relations produce agency of relevance to broader, educational issues (Savage, 2018). In our analysis, this implies viewing assemblage as a process where heterogeneous entities are gathered, brought together and linked in an assemblage (Fenwick, Edwards, & Sawchuck, 2011). It is through this very process that entities may gain agency as they acquire characteristics *relationally* (Law, 1994). By forming relations with other entities in the assemblage, entities may become actors that have 'the capacity to act and give meaning to action' (Callon, 2005, p.4). Thus, in what follows, 'entity' and 'actor' will be used interchangeably.

In this paper, we use Savage's (2019) three core analytical foci of policy assemblage; (i) relations of exteriority and emergence; (ii) heterogeneity, relationality and flux; and (iii) attention to power, politics and agency. First off, relations of exteriority characterize assemblages; meaning an entity that is part of one assemblage can at any given time also be part of other assemblages where its characteristics are different (DeLanda, 2006). Policy assemblages are not stable or made already, but are always becoming in complex entanglements. In short, assemblages can be infinite. Second, assemblages are "heterogeneous, comprised of a multiplicity of component parts that have been arranged together towards particular strategic ends" (Savage, 2019, p.7). We use the notion of heterogeneity, relationality and flux to examine how entities are strategically arranged to better steer and govern (Savage, 2019). Policy assemblages are not a result of coincidence or random arrangement, and the mere existence of heterogeneous entities does not automatically translate to the making of an assemblage (Savage, 2019). Lastly, the notion of power, politics and agency includes the comprehension of the workings of heterogeneous relations. Through the relational capacities of heterogeneous entities, policy assemblage offers the possibility to examine how these relations create governable forms (Savage, 2019). In an assemblage, power is potentially everywhere and is distributed as entities gain agency relationally. Slightly rephrased, power is composed relationally through the relations between actors in an assemblage. While we cannot make claims about the entities' power in practice based on our empirical data, we examine the entities' *potential* to exert power as other entities heavily rely on them in order for a digitized activity to be realized.

We use the concept of policy assemblage as means to examine how heterogeneous relations form in the ways that they are articulated, imagined and arranged in policy documents to generate governable forms of digitization (Savage, 2019). This implies analyzing how digitization is being stabilized and legitimized through their embedded relations. The use of policy assemblage raises a few methodological considerations, such as how we identified entities and by what means these were determined to be an actor in the assemblage. The upcoming section will therefore

continue to incorporate and clarify central points of policy assemblage as we describe our methodological steps.

Methodology

The empirical data in this chapter builds on four policy documents (White Papers and Green Papers). These documents have been selected because of their importance to the ongoing subject renewal reform Fagfornyelsen, which is the first to be solely available online. There has been a digital restructure of curriculum, guidelines and support material. Thus, analyzing policy documents that lead up to Fagfornyelsen provides information about current digitization strategies in the Norwegian context. One official report (NOU) has been included in the analysis, because these types of reports are funded and appointed by Royal Norwegian Commissions and has been an important policy document in the pre-phase of the subject renewal. Although documents may very well be considered actors in an assemblage, we have analyzed the policy documents as 'windows' into the policy of digitization (Baker & McGuirk, 2017). The policy documents are therefore not part of the assemblage in our analysis, but are used as sources to reveal particular sociomaterial relations of imagined school practices with the digital (Table 10.1).

To show our process of identifying entities and mapping relations in the assemblage we have used a mix of types of content analysis. We draw from three types in particular: summative content analysis, conventional analysis and directed content analysis (Fauskanger & Mosvold, 2014; Hsieh & Shannon, 2005). These three types were used as three individual steps in our analysis, and build on each other in order to provide a thorough investigation of the policy assemblage at hand.

The start of our analysis was done through a simple version of summative content analysis. Summative content analysis can be based on tracking words in textual data to find meanings (Fauskanger & Mosvold, 2014). We used this approach to search for words related to digitization in the three documents that were not distinct digital strategies (White Papers and Green Papers that covered much more than the topic of digitization). The search for words directed us to segments in the policy documents that solely articulated practices in relation to *something* digital. However, we found that not all the segments identified in the word search were relevant to our

Table 10.1 Policy documents analyzed

Policy documents analyzed
NOU 2015:8 – Fremtidens Skole [School of the Future].
Meld. St. 21 – Lærelyst – tidlig innsats og kvalitet i skolen [Apprenticeship – Early efforts and Quality in School].
Meld. St. 28 – Fag – Fordypning – Forståelse. En fornyelse av Kunnskapsløftet. [Subjects – Specialization – Understanding. A Renewal of the Knowledge Promotion].
Framtid, fornyelse og digitalisering. Digitaliseringsstrategi for grunnopplæringen 2017-2021. [Future, renewal and digitalization. Digitalization Strategy for Basic Education].

research. Assemblages can be infinite (Savage, 2019), and we did a methodological choice to cut the assemblage considering the focus of our study; governmental expectations to use digital technologies in schools. This is best explained by the notion of exteriority (Savage, 2019), as entities in one assemblage can at any given time be part of other assemblages with different characteristics, or have extending assemblages imbued within them. The level of our analysis and the limit of the assemblage was therefore set to be on the level of school and school governance in regards to digitization. We acknowledge that an expanded version of the assemblage would include far more entities, however, such an expansion could potentially be bottomless and outside the intentions of this study.

We proceeded to code entities through a conventional content analysis (Hsieh & Shannon, 2005). In conventional content analysis, codes are deduced from the dataset. Entities were coded, identified and included in the assemblage if their described characteristics showed they were expected to either perform a digital practice in schools or take part in one. For instance, the entity Learning Analytics was coded because its characteristics illustrate action: the digital formations within learning analytics actively collects data, and can track student development over time. In fact, when school practitioners are expected to collect and distribute data, it is learning analytics that partly performs the action. The relations that form between entities is intrinsic to policy assemblage, and for understanding how agency and power is distributed across the assemblage (Savage, 2019). We were therefore interested in coding the relations between entities that were expected to partake in the activity. To build on the previous example: the entity learning analytics engage with digital teaching material because it exists and is exploited on these platforms; students may engage with it as their information is collected; teachers are expected to analyze the information to inform teaching and learning; school leaders can make use of it for further school development plans. In this conventional content analysis, we were able to identify four entities in relation to learning analytics; digital teaching material, students, teachers, and school leaders (Table 10.2).

We identified additional relations by using directed content analysis that typically deduces codes from theory (Hsieh & Shannon, 2005). We proceeded to do a third reading of the segments drawing from conceptualizations in the field of digitization (Hsieh & Shannon, 2005). We drew in particular from previous knowledge of the characteristics of big data (Kitchin & McArdle, 2016), as well as the workings of big data and digitization in educational governance (Williamson, 2016, 2017). Our use of directed content analysis can be demonstrated by taking the example of the entity the NQAS. By reading the characteristics of NQAS we found that it is highly based on gathering vast amounts of information. With some previous knowledge of what learning analytics entails, we were able to identify that these information sources are indeed forms of learning analytics. Thus, the NQAS forms relations with the entity learning analytics, in the way that the policy documents imagines the NQAS to digitally gather, process and analyze information (data). Lastly, we included descriptions of the expected outcomes in order to better analyze the coded entities and relations' potential to create a governable space for action (Savage, 2019).

Table 10.2 Example from coding scheme

Entity	Characteristics	Relations	Expected outcome
Learning Analytics (LA)	Exploited by digital teaching material to collect large amounts of data. Track student development over time (digitally). Students, teachers and school leaders are expected to engage with such digital teaching material, and always evaluate its potential for teaching and learning.	Teachers School leaders Students Digital teaching material	To be used in assessment (especially formative assessment), for differentiation of teaching and learning, for continuous feedback. The individual students' needs is in focus. Will require new teacher competence (KILDE).
The National Quality Assessment System (NQAS)	Comprised by: gathering information to form a knowledge bank, tools, routines and measures. The data is gathered digitally. The digital data within the NQAS includes: results on international tests, national tests, mapping tests, and student surveys.	Teachers School leaders Students Learning analytics	For teachers to plan, assess and conduct teaching. For schools to ensure quality and to assist in school development. For educational authorities to govern.

Findings

The policy assemblage in our analysis is comprised by heterogeneous entities with various relations. To address the aim of our study, the following analysis reveals how entities are imagined to connect and form relations to generate governable forms of digitization. Three main categories of entities emerged from our analysis: (i) digital formations, (ii) governance tools, and (iii) human beings. In the forthcoming, we present findings from these three categories.

Digital Formations

Intrinsic to big data is its varying forms of data analytics that allows digital data to be collected in a speedy and timely matter (Kitchin, 2014; Kitchin & McArdle, 2016). We found presentations of big data in our analysis, although the term itself was not used in either of the policy documents. However, terms within the realm of big data and digitization that are explicitly articulated in the documents, are learning analytics and adaptive algorithms. These entities are consistently described in relation to digital teaching material.

We found that digital teaching material is reported as being enablers of a wide range of activities. The entity is first off a presentation of digital textbooks and didactic aid. In Norway, the selection of digital technologies (including teaching material) lies on a municipal level (Gilje et al., 2016). However, teachers and school leaders are increasingly invited to evaluate and assess the possibilities of such teaching material (Ministry of Education and Research, 2015, 2017b). Moreover, we

found that digital teaching material is highlighted as having the potential to offer customized aid for each individual student. Students are to make use of the digital textbook or platform to assist with their learning, often leaving a digital 'footprint' in terms of assessment or evaluation data. Teachers and school leaders may take advantage of such material to differentiate teaching and learning for low-performing and high-performing students according to their needs and prerequisites (Ministry of Education and Research, 2017a). In order for digital teaching material to offer an individualized and personalized teaching experience for students, these platforms rely on learning analytics and adaptive algorithms.

Adaptive algorithms has been identified as an entity as it is imagined to be part of digital teaching material that is able to change the course of action for students interacting with it. This may be algorithmic testing (Høvsgaard Maguire, 2019). Algorithmic testing relies on information from the students 'as they go'. Students may engage with it as they answer questions with predefined choices on the test. The algorithms come into place as they collect the students' answers there and then, analyze it, and steer the remaining of the test in the 'right' direction according to the level of their answers. In addition to forming links with digital teaching material and students, we find that adaptive algorithms are also entangled with teachers and school leaders in the assemblage. Teachers and school leaders are encouraged to assess the predefined choices in adaptive testing, considering what is being measured and understand its learning approach (Ministry of Education and research, 2017a). We find that the imagined digitalization practices with adaptive algorithms is assessment, as well as differentiation of teaching and learning. In this sense, the algorithm is imagined to perform the differentiation and are important actors in identifying 'what works' for each individual student in that particular moment. We find that this description enforces an individualized, personalized and evidence-based assessment practice, as the interest lies in the peculiarities of each student. Keep in mind that context knowledge is often outside the workings of algorithms, which is where teachers and school leaders need to exercise professional judgement. Adaptive algorithms, like digital formations of big data in general (Kitchin & McArdle, 2016), are not neutral instruments. Revealing the 'black box' of adaptive algorithms is consequently an important job for its users. The policy documents are careful in demonstrating school leaders and teachers' possible response to the workings of adaptive algorithms in mundane school practices, such as questions of their professional autonomy. They do however acknowledge that it will be particularly difficult for school practitioners to evaluate pre-defined choices, and comprehend what material that becomes available to which students on digital teaching material that uses adaptive algorithms (Ministry of Education and Research, 2017a). The expectation to interpret and analyze the workings of adaptive algorithms invites teachers and school leaders to do in-house 'policy work' by engaging in evidence-based discussions, albeit questioning whether school practitioners have the necessary competence to do so.

The entity learning analytics forms relations with digital teaching material that is designed and coded to offer the collation of data. We find that its intended characteristics are to collect vast amounts of data and to monitor student development over

time. Its relations include students; students may engage with learning analytics by taking a test or a survey, leaving a set of data behind. It also forms relations with teachers and school leaders as they are expected to exploit the data to inform their own practice (NOU, 2015:8; Ministry of Education and Research, 2017a). In particular, its intended action is to assist in the digitalization of assessment. As written in NOU, 2015:8 Fremtidens skole [School of the Future] on page 89:

> An area such as learning analytics may be used to enhance the work with formative assessment. This means that digital tools could be used to track pupil development over time in the form of many observations and results. Such technology may change the conditions for learning, teaching and formative assessment in school, and will require new teacher competence.

As learning analytics may facilitate practices of formative assessment, we find that it is expected to equally facilitate practices of evidence-based policy. As the above quotation implies; there is an interest in tracking student development over time. Within learning analytics, this phenomenon is best exemplified by its possibility to record the performance of individual students, groups of students, and schools to create new ways of imagining and intervening in education (Williamson, 2017). We find that in Norway, learning analytics is imagined to make things (in forms of data) visible, observable and trackable, thus providing a governable form of evidence in a 'real-time' matter. Information provided by learning analytics will in turn support students, teachers and school leaders in 'other ways than the practice is today' (NOU, 2015:8, p.89), suggesting a shift in school practice that will call for new competence. New, digitalized competence for teachers, school leaders and students includes the evaluation of selectivity and bias in digitized systems using learning analytics (Ministry of Education and Research, 2017a). The policy documents are careful in detailing learning analytics' role in educational governance. However, through our directed content analysis, we find that the imagined school practices with learning analytics generate links with governance tools, implying that learning analytics has been an area of digitization that has prevailed in Norwegian schools for some time.

Governance Tools

In total, we coded two separate governance tools in the assemblage: the NQAS and the Point-of-View (PoV) analysis tool. The NQAS' strategic design evolves on gathering data to best govern, monitor and develop quality in Norwegian schools. The information provided within NQAS has thus various goals (expected outcomes); from improving assessment practice in schools, to map students who face specific challenges, and for local and national educational authorities to better govern. The PoV tool is a process tool for schools to ensure quality as is intended in the NQAS. It is comprised of three steps; to gather information (data) provided within the NQAS and other relevant data within the school, create a knowledge bank based

on this data, and set targets for further actions. In Meld. St. 21 on page 69, the first step of the PoV tool is described as (translation by authors):

1. Gather information: In the first phase, information about the schools' resources, students' learning environment and learning results is collected from Skoleporten. It is also possible to include local information.

We find that the relevant data that is to be gathered in the PoV is closely linked to the NQAS, as schools are encouraged to gather information from the Directorate's webpage for quality assessment, Skoleporten. The relations between the NQAS and the PoV tool is thus visible, however, we identified other, extending relations to digital formations. Specifically, we find that in the reflection and analysis stages of the PoV and NQAS, the entities highly rely on learning analytics to perform the action of quality assessment as is intended from the Directorate. Learning analytics performs the digital collection, distribution and presentation of data, whereas the governance tools 'soak up' the information to spark a desired action in schools. Analyzing learning analytics in relation to the governance tools tells us that learning analytics is the very foundation of the NQAS and the PoV tool, and is indispensable to the performative side of the governance tools. Without digital formations in place, the governance tools would lose essential characteristics such as the capability to track student data. This entails that learning analytics, within the governance tools, is imagined to provide automated information for schools to govern in-house and up-close through constant interactions with individual students. The close relation between the governance tools and digital formations thus engenders the possibility to identify, analyze, allocate, and delegate duties based on automated, evidence-based practices. Put differently: the NQAS and the PoV tool materialize by using digital policy instruments that exploits techniques of big data.

It is worth mentioning again that we identified the relations between the NQAS, the PoV tool and learning analytics through a directed content analysis based on previous conceptualizations in the field of digitization. However, learning analytics' role in Norwegian school governance is not explicitly addressed in the documents, neither the question of autonomy of local teachers, school leaders, and schools in relation to big data. The expectations towards teachers and school leaders to engage in digitized practices is nevertheless addressed in the documents and paints a picture of considerable local responsibility to ensure digital competence and ethical considerations amongst the staff.

Human Beings

Once relations form between digital formations and governance tools, we find that new relations may be forged in the assemblage with human actors at school level. Students are to use the digital teaching material, their data is gathered in various forms of learning analytics, and they may engage in assessment practices using adaptive algorithms. Teachers are expected to utilize these presentations of digital

formations to diversify and differentiate their teaching, both in the organization of teaching and in the classroom. This goal presupposes that teachers have the necessary competence to analyze and evaluate the advantages and disadvantages of digital teaching material that uses learning analytics and adaptive algorithms. While the documents clearly state that the teacher profession should engage in these issues collectively, they are also apprehensive to the fact that both newly qualified teachers and experienced teachers may not have sufficient digital competence to assess the quality, ethics and data security of digital teaching material (Ministry of Education and Research, 2017a).

The school leadership team is responsible for making sure that all staff have the necessary expertise in ICT, in information security and privacy, as well as to ensure that personal data is handled in accordance to laws and regulations (Ministry of Education and Research, 2017a). School leaders are also responsible for facilitating practices of quality assessment in schools to enhance school quality and teaching practices. This may include time and effort to identify school development issues through tools like the PoV. As such, school leaders are imagined to engage with the NQAS, learning analytics, and adaptive algorithms through careful monitoring and follow-up of results on national tests, mapping tests, algorithmic tests, and student surveys. This mirrors an evidence-based approach as teachers and school leaders are expected to make decisions based on data-informed practices. We argue that these digital, data-informed practices will have implications for school leaders and teachers as they will have to acquire sufficient knowledge about 'new' concepts, 'new' expectations, and the coherence between digitized systems while simultaneously being able to effectively exploit the digital tools.

Discussion

In this chapter, we aimed to investigate how heterogeneous actors are assembled in Norwegian policy documents to fulfill governmental aims of digitization. The analysis above shows that relations form between (potential) heterogeneous actors of digital formations, governance tools and human beings as policy intentions of digitization practices are formulated in the documents. Savage (2019) argues that what is most important in an assemblage approach is to understand the nature of relations of the component parts, rather than the mere presence of them. This, in turn, draws attention to the capacities such relations generate as they *come together*, *emerge* and *become* in complex entanglements. This notion is further highlighted by the focus on heterogeneity, relationality and flux in assemblage approaches (Savage, 2019). In our analysis, we find that the specific relations that emerge between the entities are crucial to understand the imagined practices of digitization. On the one hand, examining the characteristics of an individual entity could yield some fruitful findings. For instance, the analysis of the entity NQAS describes its internal workings and possibilities to collate data and inform on evidence. However, when examining the activity that the NQAS is imagined to facilitate, it can hardly be analyzed in

isolation. Our findings suggest that the NQAS relies on learning analytics, alongside teachers, school leaders and students, to be able to perform potential policy intentions of governance and digitization at school level. Thus, we find that agency is distributed across the assemblage, and one entity without the other may not have generated the same imagined activity.

In policy documents, the assemblage of potential entities is arranged to best serve the policy intentions (Savage, 2019). The way entities come together may determine the potential practices of a policy or an agenda (Savage, 2019), such as a 'what works' agenda. The analysis of the assemblage of digital formations, governance tools and human beings shows that the relations provoke a governance agenda with some expected outcomes. These outcomes are mostly descriptions of assessment, differentiation of teaching and learning, and quality assessment. Catering to the needs of both high performing and low performing students is one of the main goals of the imagined digitization in Norwegian schools, for instance through the use of adaptive algorithms. Within these descriptions, we find that the relations between heterogeneous actors engender practices with personalized solutions where the individual student, individual class, and individual school is of interest. The digital formations in place will facilitate the necessary personalization and individualization that the governance tools seek to accomplish. Teachers and school leaders are expected to engage in these digitization practices in order to make evidence-based decisions. This suggests that teachers and school leaders may be dependent on digital teaching material to achieve governmental ambitions of quality assessment in Norwegian schools. This resonates well with Williamson's (2017) argument that data analytics, software and database instruments play an important role in efforts to govern teaching and learning. Our findings indicate that the described heterogeneous actors shape the policy intentions of digitization in relation and interaction with each other to put forward and legitimize governmental ambitions of evidence-based practice. The analysis has in particular shown that digital formations are expected to be important actors in identifying 'what works' for each individual student (such as algorithmic testing), best practice (learning analytics) and evidence (learning analytics through the NQAS).

Findings further suggest that in Norway, digitization has not only been enhanced by introducing ICT in education, but by an intertwined process of digital developments and an effort to optimize governance mechanisms. In a way, we argue that it might be challenging to distinguish the NQAS, the PoV tool and learning analytics from each other in the assemblage. The characteristics of learning analytics as an individual entity is clear-cut, however, we found that the very nature of the governance tools build on essential premises of learning analytics (such as the continuous tracking of performance results). These findings indicated that the governance tools highly rely on learning analytics to have the potential to become performative. In fact, using a policy assemblage lens (Savage, 2019), the governance tools are *made into being* by the expected, performative actions of learning analytics that allows schools and educational authorities to harvest, distribute and analyze student data. It is difficult to imagine a quality assessment system without technological advancements and important questions arise; how would the NQAS look like without

sophisticated digital formations in place? Who or what would collate, analyze and present the data (and thus perform the action)? The NQAS and the PoV tool is dependent on learning analytics to perform the practice of quality assessment in Norway. Learning analytics is in this sense a crucial and strategic entity in the assemblage (Savage, 2019), and exerts power as other entities depend on it to comply with governmental ambitions of digitization.

While the documents frame big data practices as something 'new', we have found that sophisticated forms of big data have been introduced to Norwegian schools over a decade ago – the NQAS have since its beginning built on learning analytics in order to reinforce and intensify governance mechanisms. Learning analytics, as expressed within governance tools, may have been based on a less complex form from its outset, but it has nevertheless existed and persisted in Norwegian education for years. As the policy documents informs that the use of learning analytics and adaptive algorithms will increase in the years ahead, they simultaneously warn about the lack of teacher and school leader competence to exert the necessary judgement of such materials. This suggests that Norwegian schools should already be acquainted with practices of big data, albeit with limited competence to partake in such practices. Consequently, this means that while teachers and school leaders in Norway may be given the opportunity to exert professional autonomy by engaging in local data-interpretation, this autonomy is influenced by lack of competence. Digital formations may in this sense gain authority as it becomes an important actor in steering the direction of governance, and in so doing both opens up and limits the professional autonomy of school practitioners (Høvsgaard Maguire, 2019; Williamson, 2017). The materialization of governance tools is imagined to digitize mundane school practices such as assessment, evaluation and quality assessment. We find that digitization then becomes a question of a re-imagination of governance mechanisms in a personalized, precise, and digital form. With new governance tools being rolled out in Norwegian schools (i.e. the VAI), it will be important to continue to disentangle its sociomaterial entities to fully grasp its potential in questions of agency, power and governance.

Conclusion

Overall, this study has found that policy intentions to digitize Norwegian schools result in complex entanglements of heterogeneous actors as they together may *become* in the relations they are expected to take on. This study found three categories of heterogeneous actors: digital formations, governance tools, and human beings. The relations that form between the prior two have been of particular interest. Within the relations that arose from our analysis, the study yielded two overlapping discussion points. The first one is the importance of studying (digitization) policy as assemblages with their heterogeneity, relationality, and emergence, as is discussed by Savage (2019). The second is the discussion of the very nature of the heterogeneous actors' characteristics and relations that create the potential to exert

power and agency. The latter point demonstrated how the heterogeneous actors in the policy assemblage relationally enacted governance mechanisms through digital means. The relation between the NQAS and learning analytics exemplified this; the entities have the potential to become performative as a result of the relations they form. As such, our study confirmed predominant conceptions of educational governance as being realized by digital formations (Landri, 2018; Williamson, 2017). The analysis therefore demonstrated 'how multiple heterogeneous components are arranged to create governable forms' (Savage, 2019, p.10), for example, the expectations for teachers and school leaders to ensure quality in schools by analyzing individualized data sets – a practice that is manageable by using digital teaching material with adaptive algorithms or learning analytics.

Educational policy is filled with intentions that materialize in potential actions of human and non-human actors (Gorur, 2011). We have found this to be the case in Norwegian policy documents targeting digitization. There is a need for educational policy research to acknowledge the potential practices of digitization; to view policy as assemblages with a wide range of actors that create the conditions of possibility for certain activities to merge (and others not), and to acknowledge how non-human actors may exert agency, form potential actions, and help legitimize policy of the 'what works' agenda (Baker & McGuirk, 2017; Fenwick et al., 2011; Savage, 2019). This positions policy assemblage as a promising approach in educational research. That said, we stress that we have analyzed policy documents. The actual realities in schools, how digital actors gain power and govern (or come to be governed) is up for future empirical investigation. Such studies may examine a specific digital tool in practice; how teachers and school leaders respond to it; and how some actors may resist or accept the relations with other heterogeneous actors in the assemblage. This suggests further empirical research in schools to map teachers' and school leaders' knowledge of and practice with data analytics, and its functions in governance. Nevertheless, we have established that digital formations are potentially important actors of gathering evidence and identifying what best practice is, and what it should be in Norwegian education. This raises the question of whether digitization reproduces or re-imagines existing governance mechanisms of evidence and the 'what works' agenda.

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Chapter 11
Understanding Swedish Educational Policy Developments in the Field of Digital Education

Limin Gu and Ola J. Lindberg

Abstract This chapter describes and analyzes Swedish educational policy related to technology and digital education over the past decades with a focus on how the relation between learning and information technology, as well as digitalization and its impact on other aspects of school development and management have been argued for and how it has been proposed to influence school practice. The analysis is based on a review of eight selected educational policy documents that relate to the framework of phases of Swedish educational reforms suggested by Sundberg. The result reveals that although there are some overlaps and recurring themes in the politics over time, connections between the rationale behind the political arguments and the reform timeframes are obvious. During its early years, digital education adopted a clear centralized and top-down strategy with extensive government investments without taking into account the local needs and conditions. Later, in line with decentralization and marketization of education, the performance turn, and the adoption of accountability as a governing model, more demands have been placed on local responsibility and self-regulating regarding digitalization in school. At the same time, research-based evidence and international comparison have been used as a basis to justify further development of digital education.

Keywords Digital education · Education reforms · Technology and learning · Digitalization in schools · Educational policy

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Introduction

Digitalization in schools is nothing new. It has taken place in various phases and to various extents over the past 40–60 years. Sweden has witnessed a long trajectory of the development of digitalization in the school system. Computers had already been introduced in Swedish schools in the 1970s (Ministry of Education, 2002; National Agency for Education, 2018). Development at that time was slow, and only a few schools were involved. In the 1980s, digitization in terms of computerization in schools was estimated to be about one billion Swedish crowns (about 95 million EUR. Ministry of Education, 2002). According to Jedeskog (2005), there were several waves of development during the 1980s. The first wave had the intention to introduce computers to the seventh to ninth grades of compulsory school, so as to teach students to be computer literate. The second wave in the late 1980s was intended to increase the general use of computers in schools. During that period, the focus on computers in schools mainly consisted of three levels: central development work to develop school-adapted software, regional development work to improve infrastructure, and experimental activities in selected schools (Ministry of Education, 2002).

National initiatives in the 1990s and beyond have carried out extensive investments in digital technology in schools. Compared to the rest of Europe, Sweden invested the most in information and communication technology in schools (Hamngren & Odhnoff, 2009). Since the late-1990s, the focus has shifted from the previous goals of equipping schools with computers and basic computer learning to technology-related competence development for teachers and to increase students' achievement of the curriculum's knowledge goals through computer use. The Internet revolution in the late-1990s had fundamentally changed the conditions for information technology (IT) in the school (Ministry of Education, 2002). The great wave of digitization in schools came when schools were able to offer each student a digital device (one-to-one) with stable Internet access during the 2000s (National Agency for Education, 2018). The National Agency for Education (2019) reported that, in principle, all pupils in the Swedish school now have access to their own computers. Since the beginning of the 2010s, learning platforms and digital networking have become increasingly important for schoolwork. A learning management system, which is a web-based learning environment for communication between teachers and students, has become ever more standard in teaching contexts. Learning management systems also have coordination effects e.g., students and guardians can access digital material and update the students' knowledge, goal fulfillment, and other developmental statuses through the learning management systems (National Agency for Education, 2018).

Although previous IT investments in the school have lacked systematic evaluations, regular evaluations have been carried out recently. Since 2008, every 3 years, the National Agency for Education (2009, 2013, 2016, 2019) has followed up on the development of access, use, and competence regarding digital technology and digital tools. In line with the development of digitalization, research has also increased on IT use in the school. However, research on digital transformation in education

has mainly focused on the integration of digital technology in classroom teaching and learning, as well as how the changing conditions duo to digitalization have affected educators' work and students' academic and social goal fulfilment. Some researchers have studied users' perceptions, attitudes, and competencies necessary for the use of digital tools and resources in formal and informal environments (e.g., Haglind, 2015; Holmberg, 2019; Tallvid, 2015; Willermark, 2018). More recently, research on learning with digital technologies from the perspectives of multimodality and social semiotics has increased, in which the study's object is to demonstrate and understand the functions of the semiotic modes in the meaning-making process (e.g., Bezemer & Kress, 2016; Kress & Selander, 2012; Ravelli & van Leeuwen, 2018).

However, studies on the development of digital education policy over the past decades have been scarce. Political decisions, together with the teacher's professional missions, are of crucial importance in structuring and restructuring the education system. Digital education should be seen as an integral part of education governance. Given this, in relation to the fact that digitalization is an expanding area of education policy that lies within the major political and economic changes in societies, it seems that digital education has tended to lead a fundamental transformation of public education systems. In this context, a closer and more critical analysis of the rationale regarding digital education and its consequences for school systems and practices will contribute to our understanding of how we relate digital education to the broader ideas that education should embody for the individual and society.

This chapter aims to describe and analyze Swedish educational policy related to technology and digital education over the past decades with a focus on how the relation between learning and IT, as well as digitalization and its impact on other aspects of school development and management, has been argued for and how it has been proposed to influence school practice. The leading questions are:

- What goals and strategies for commitment, initiative, and implementation of digital education are proposed and argued for in policies during the different periods?
- How has the role of digital technology in digital education been formulated, expressed, and motivated in the policy documents?
- How can digital education policy changes be understood in relation to various phases of Swedish educational reforms?

Frameworks

Digital education is an important part of the national education system and strategy. To study the evolution of digital education policy and its implementation, it should be incorporated into the major educational reforms since the late twentieth century and include an analysis of the circumstances in which these major educational reforms have taken place. To frame the analysis and outline a path of educational policy initiatives for digitization in Swedish education, the proposed phases of

Swedish educational reforms by Sundberg (Chap. 6, this volume), the periods of rational planning (1960–1990), educational restructuring (1990–2010), and performative accountability (2010–) are adapted and applied.

Rational Planning (1960–1990)

Education in modern Sweden is an important area closely linked to the Swedish welfare system, which was based on the strong economic growth after the Second World War. A prominent aspect of the Swedish welfare model has been the powerful state and the rational model for social governance. It was believed that social change would be achieved through political and administrative procedures. This model was based on a normative ideal of the rationalist perspective on decision-making that trusted in the ability of state actors' and agencies' comprehensive knowledge to make the best decisions. Tveit and Lundahl (2017) called this model a collaboracy mode of policy legitimation that enabled national politicians to set policy goals, and the government's investigative committees engaged experts and researchers to support decision making. During that period, major educational reforms were based on concepts of centralism, universality, and consensus (Lindblad & Lundahl, 1999).

Educational Restructuring (1990–2010)

Since the 1990s, this rationalist political model has ended. Local influence, the need for decentralization, and individual freedom of choice have increased, and the legitimacy of national administrative authorities has declined (SOU, 1990), which were characterized by a functional transformation from the implementation of political programs to dissemination of information, execution of contact programs, and evaluation (Lindvall & Rothstein, 2006). The Swedish educational landscape has changed radically. During the 1990s, the school was municipalized, and free choice of school and establishment of independent schools were allowed. The education system was restructured to be decentralized with more local variations as a result of the introduction of management by goals and governing by results (Carlgren, 1995). The new National Curriculum (LpO 94) opened up for local interpretation and variation. Much of what had been previously decided on a central level was now left to schools, teachers, and students to decide and negotiate. The policy is legitimated through a so-called agency mode (Tveit & Lundahl, 2017). In education, international agencies, such as the OECD and the European Union, are increasingly used by decision makers to provide synthesized comparative data that can be applied in national educational reform agendas under the condition of Europeanization or globalization (Dale & Robertson, 2009; Lawn & Grek, 2012). Changes also occurred in discourses, and terms such as equality of opportunity, equal standards, and a school for all children were gradually replaced by notions such as excellence, competition, free choice, and quality, as some of the results of the neoliberal ways of thinking (Carlgren, 2009).

Performance Accountability (2010–)

Along with the international trend of agency mode for policy legitimation, another strategy has been the development of quality assurance and evaluation (QAE) as an instrument for school governance within or across nation states. Decentralization and increased independence and autonomy at the local level have entailed intensified reciprocal accountability measurements at the national level. The underlying rationale for accountability is that producers are held accountable for the results they generate. In the educational context, accountability is largely related to students' performance. Governing is based on the results of schooling by means of students' performance on tests and other kinds of indicators as to how well schools are performing (Lindblad, 2018). Teachers and schools, which are entrusted with the necessary task of teaching and instruction, are the producers, whereas students' test results function as the measurable outcome (Rosenkvist, 2010). International large-scale assessments and statistical comparative data are usually referred to as scientific evidence in legitimating the national education policy (Ringarp & Waldow, 2016).

Data Selection and Analysis

In this study, national policy documents related to digital education were selected based on their relevance to the major investments and initiatives within the area of digital education in the Swedish education system as well as their impact on school practices through the given time frame. We obtained the documents from three main public sources: Swedish Government Official Reports (SOU), the Publications Series of the Ministry of Education, and Government Bills and Government Written Communications. Government Official Reports (SOU) are important in Swedish policy formation. These reports are carried out by a government-appointed committee or commission of inquiry to examine various alternatives in relation to specific issues. The government provides a set of guidelines for the commission's work in terms of reference, and it sets out what issue the commission is to examine, what problems must be solved, and by what date the inquiry should be completed. Reports often have a predetermined effect on the political decisions that are actually taken (Pettersson, 2013). Since 1968, the Ministry of Education has been responsible for the government's education and research policy that is usually based on investigations presented in reports. The government's vision and strategies regarding digital education efforts are also expressed in the government's written communication and in the bills where the planning and budget for various areas, including education for the coming years, are presented. A total of eight policy documents were selected for analysis (see Table 11.1).

There are various types of policy studies and strategies for policy analysis that rely on different approaches. One approach aims primarily to examine the causes and consequences of public policy. Such an approach tends to provide more

Table 11.1 Themes covered in the policy documents in this study

Time periods	Policy documents	Goals and strategies of digital education	Role and function of technology in digital education
1960–1990 Rational planning		Theme: Centralization and top-down initiative	Theme: Digitalization as a means for achieving equality and equivalence
	Government Bill: 1983/84:100. The Ministry of Education, 1983	Societal values such as gender equality and gaps between generations	Knowledge about technology and its use.
	Action program for computer education in school, adult education and teacher education. The Ministry of Education Publication Series 1986:10 (computer education group). 1986	The good computer society. Social values such as gender equality and rights for people with disabilities. Societal consequences for work, relations between humans, issues of power, integrity (supplement 10, page 10).	Computer support for pupils with special needs, to enhance learning. In teacher education as a support for teaching. Possibilities to be used and risks to be avoided. Computer technology as a tool for effective teaching with enhanced quality.
1990–2010 Educational restructuring		Theme: Decentralization and evidence-based practice	Theme: Digitalization as a tool for effective teaching and learning
	Wings for human ability. Government official report. 1994:118, 1994	IT as a tool for achieving individual and societal values as gender issues (girls and women and technology), and disabled, Communication, collaboration, information, develop new knowledge, problem-solving, being meeting, socializing.	IT to enhance life quality for all. IT as a force for internationalization and globalization.
	The learning tool – national program for IT in school. Government Communication 1997/98:178, 1998	Preparing for a changing working life and future education. Learning for the knowledge society. Lifelong learning.	IT as a tool for learning. IT as part of everyday life.
	Next step. The Ministry of Education Publications Series 2002:19, 2002	Constructivist approach, creating meaning.	IT as a tool to support learning, communication, interactivity, student centered learning, holistic approaches, authentic and complex situations
	From IT policy for society to politics for IT society. Government Bill 2004/05: 175., 2004	Providing competences for the information society.	IT should contribute to enhanced quality of life, sustainability,

(continued)

Table 11.1 (continued)

Time periods	Policy documents	Goals and strategies of digital education	Role and function of technology in digital education
2010– Performance accountability		Theme: The use of big data and international comparison	Theme: Digitalization as an instrument in global competition
	A digital agenda in human service – a bright future can be ours. Government Official Report 2014:13	Education for the future. Societal values such as gender equality. Equal access to digital technology. Digital competence to be employable or capable to run a business.	Tools for learning in a modern education.
	National digitization strategy for the school system. The Ministry of Education 2017	Education to learn about and have the possibility to change the world. Education for democracy.	Effective use of the possibilities of digital technology for gaining knowledge and achieve equity. Technology provides conditions that steer, important to understand how technology works in order to know how to change.

descriptive and predictable information (Hardy, 2009). Policy research can also be regarded as a practice of trying to describe and analyze the effects of a policy that already exists or projecting large social effects of the policy structure. In this context, policy research is one step closer to examining policy relevance. It is focused on observing what motives for a policy change have been presented and what proposed impacts and effects of the policy have been argued for (Lingard, 2009).

To explore values and interests served by a particular policy, one strategy is to examine educational policy from a historical perspective, especially for determining "the major ideas, values and critical factors that have influenced and shaped the direction of education policy in a given period" (Phillips, 2003, p. 2). By relying on the framework (Sundberg, Chap. 6, this volume) and using a qualitative analysis software program for content analysis, we identified central themes in the selected documents (see Table 11.1). All documents included in this paper were read through several times by the authors aiming to provide both comprehensive and detailed information relevant to the themes. In the following Findings section, we elaborate on the analysis in more detail.

Findings

In the following section, we present an overview of the central themes in the policy documents in Table 11.1, followed by more detailed descriptions of the arguments contained in the selected policy documents regarding goals and strategies for digital education as well as the role of digital technology in digital education.

The Goal and Strategies of Digital Education

Centralization and Top-Down Initiatives

In the early years of digital education, the focus was on the provision of computer equipment and software for the late compulsory years. During the 1980s, a comprehensive investment in basic education had been carried out in the field of computers in schools by the state. It was intended to be implemented successfully over 3 years from the 1984–1985 financial year. As a stimulus to the municipalities, it was proposed that they should receive government grants (120 million SEK) for the purchase of computer equipment and software for all lower secondary schools. Regarding teacher competence, it was clearly reasoned that one or two teachers per lower secondary school should have a more qualified continuing education in IT. They will then pass on their knowledge of IT to their colleagues and become responsible for part of the computer teaching (Government Bill, 1983/84:100, 1983).

It was also proposed that special funds would be allocated partly for information and development work with a focus on computer teaching and partly to support the production of teaching materials in this area (Government Bill, 1983/84:100, 1983). As computer education would be integrated into the curriculum, teachers' access to computers and their computer literacy and skills training became a priority area for investment. The government decided that teachers who teach in social sciences and mathematics at lower secondary school and teachers in upper secondary school who teach computer learning and computer use could receive full pay for 3 and 5 weeks' training in computer education respectively (ibid.).

National efforts toward computerization in schools continued to expand during the late 1980s with a budget of approximately 460 million SEK over a 5-year period. The development emphasized working on a comprehensive experimental program in the computer education area with future proposals for both goals and content as well as organization. The requirement was for at least one computer per 25 pupils in primary school. Attention should also be paid to provide the necessary accessories, special keyboards, high-quality graphics, color, and sound (Ministry of Education, 1986).

The efforts required a review of knowledge that led to revision of the syllabuses. Based on the experience of local trial operations from previous periods and in-depth analysis of foreign experiences, the state now wanted to invest in a broad computer

education geared toward the public with more focus on adults' computer education from a working life perspective. Requirements for changes in teacher education had also been an important agenda to which method development for the use of computer-based technical aids was considered (Ministry of Education, 1983/84:100, 1983).

In spring 1994, the government appointed a commission to promote widespread use of IT in Sweden. One of its major initiatives was the National Action Program for ICT in Schools (ITiS) launched by the Swedish Government (Government Communication, 1997/98:176) in 1998. ITiS was an ICT project as well as a school development project. It included all educational actors in preschool, compulsory school, special school, Sami (minority folk) school, upper secondary school, and municipal adult education. All Swedish municipalities chose to participate in all parts of the program. Several guiding principles underpinned the planning of the program and informed the implementation in the municipalities. Equal standards between schools and equal quality for students as well as the dimension of school development were stressed (Ministry of Education, 2002).

Decentralization and Evidence-Based Practice

The restructuring of education during the 1990s had been a global movement with many similarities in various countries. Swedish education seemed to have restructured faster and more radically than most other countries. It turned into one of the most decentralized systems in the OECD countries. The first phase of the restructuring emphasized the decentralizing aspects of building large spaces for local decisions, followed by the municipalization and privatization of the school in the early 1990s. The state grants for IT investments to the school reduced; instead, more responsibility, both economically and politically, was given to the municipalities and local educational institutions. The Government Official Report (SOU, 1994) claimed that municipalities and schools, including independent schools, are responsible for promoting the use of IT in education and setting goals for how this should be done. Each municipality must work on a strategy for IT use and its expansion in the school:

> IT use in school cannot and should not be regulated from the central level. There is already support in the national documents and aims for the use of IT in school. The municipalities must therefore establish IT strategies that provide guidance and support and ensure that IT is part of the teachers' continuing education. (Ministry of Education, 2002, p. 17)

The principals have the same responsibility for their own schools. The use of IT in schools has increasingly been regarded as part of the school development work because successful use of IT often has its basis in a holistic view that includes organizational changes as well as new working methods and roles for teachers and pupils. However, more research into how IT best promotes school development and

how IT interacts with other measures and changes is claimed to be needed (Ministry of Education, 2002).

Decentralization, marketization, and privatization of education also demand collaboration among various sectors and stakeholders. The Agency for School Development is given the task to design a support for cooperation between public and private actors' so-called public–private partnership model (PPP cooperation). It is argued that the IT area in the school is suitable for such a model "because IT use as support for learning creates new needs within the school and can create new markets" (Government Bill, 2004/05:175, 2004, p. 109). To ensure sustainable technical solutions, the government also believes that this type of cooperative agreement should be based on open standards. Standards and recommendations are being developed in collaboration with both international and national standardization bodies. Cooperation also takes place within the framework of the Swedish School Data Network as well as the European School Data Network (ibid.).

To support schools' continued digitization, Sweden's Municipalities and Counties (SKL, changed to Sweden's Municipalities and Regions in 2019) developed a framework for evaluating how well schools are benefiting from the possibilities of digitization, LIKA (i.e., *ledning, infrastruktur, kompetens och användning.* It means management, infrastructure, skills and use in English) in 2013 to serve as a tool, particularly for principals' use, to develop strategies and to drive change work with ongoing evaluation: "The objective is that the tool should be clear and self-explanatory for the evaluation and development of the school's digitization. The tool should also be used for monitoring and comparisons of IT maturity among schools" (SOU, 2014, p. 131).

The importance of evaluation, research and international statistical comparison has been highlighted in the policy documents since the 2000s, following the international trend of evidence-based practice as support for policymaking.

> A large part of this material is based on statistical surveys mainly from the Swedish National Agency for Education and a European survey as the goal of the digital agenda, that Sweden should be the best in the world in using the possibilities of digitalization, comparisons are made from the survey between Sweden and the three countries that various issues lie mainly in Europe ... (SOU, 2014, p. 131).

Large state funding initiatives have been implemented since the early 2000s. The Swedish Research Council and the Swedish Innovation Systems Agency (Vinnova) are the largest state financiers of technology-related research, including research on IT use in schools, in cooperation with universities and colleges. The Swedish Research Council is responsible for basic research, whereas Vinnova is responsible for more applied research (Government Bill, 2004/05:175, 2004). The Ministry of Education Publication Series 's (Ministry of Education, 2002) recommendations and proposals for future IT actions in schools are based on a variety of previous research, including classroom research. The National Agency for Education is also tasked with speeding up the codification of successful local practices for digital-based teaching so as "to become proven experience that can be used in professional development efforts throughout the country" (SOU, 2014, p. 200).

The Use of Big Data and International Comparison

One of the political goals of IT is for Sweden to become the best in the world in using digital technologies. However, the goal that needs to use international indexes and rankings that measure digitization is relative: "An international outlook of this type can help capture what is happening today and give perspective to what we do to move our positions forward" (SOU, 2014, p. 36). Since the 2010s, the statistical databases at the Digital Agenda Scoreboard and the ICT Development Index (IDI) from the International Telecommunications Union (ITU) have been used as a basis for arguments presented in the IT policy documents. Based on these data, it was confirmed that Sweden already had a very strong position in international comparisons and has consistently ranked at the top in the latest rankings. Sweden was the only country among the three ranked highest on some of the more important indexes that measure digitalization in the world, as it referred to the Digitalization Commission's report from 2013 (ibid.).

Comparison has also been used as a strategy to inform and reinforce the argument and to strengthen the recommendations in the area of digital education. One example included introducing international developments in curriculum that appeared to follow different development trends with an increased focus on introducing programming as a separate subject in primary school. By referring to UK's adopted national curriculum in 2013, in which it included goals with programming (computing) in all age categories, the Swedish government argued for a same direction towards that everyone needs to learn how to program code if Sweden wants to "continue to be a strong knowledge nation and maintain its competitiveness" (SOU, 2014, p. 50). By programming, "it is not intended to learn a specific programming language. Instead, the broader concept of programming (which can also be said to include modelling problems, abstraction, logic, etc.) is intended" (ibid. p. 50). This is also clearly stated in the National Digitization Strategy for the School System (Ministry of Education, 2017):

> All children and students need to gain an understanding of how digitalization affects the world and our lives, how programming controls both the flow of information we are accessed as well as the tools we use, as well as knowledge of how technology works. (p. 3)

Another example is the influence of large-scale international comparative studies (e.g., PISA and PIRLS) in educational policymaking. This is in line with the trend of evidence-based practice that focuses on the use of the best available evidence to bring about desirable results or prevent undesirable ones. As schooling is generally considered successful only when the predetermined outcomes have been achieved, education worldwide therefore makes excessive requirements of assessment, measurement, testing, and documentation. Digitalization in schools is closely linked to this trend, partly because (a) digital technology allows for the execution of large international tests and studies, as well as the availability of big databases, and (b) digital competence is an important part of the knowledge, skills, and learning that are integrated into the assessment, measurement, testing, and documentation (SOU, 2014).

The Government Official Report (SOU, 2014) discussed the PISA results with a focus on comparison between traditional reading and digital reading, in which the Swedish students from 2012 seemed to be better at digital than traditional reading. It referred to a report of the National Agency for Education that states "traditional and digital reading can be regarded as different types of reading, but also as components of an overall literacy" (p. 133). It was also found that the advantage that Swedish students previously possessed had now also disappeared in the digital field. The result in digital reading had dropped and was now at the average level as in other participating countries, because the previous advantage was based on the fact that IT was introduced earlier in Swedish schools. If Sweden is to maintain its self-image of being a model for the world, it should continue to invest in IT in schools, and this is not about whether IT can make traditional schools more efficient but what new technology-supported methods can improve students' learning (SOU, 2014). It is argued that IT knowledge and skills are an essential part of determining if students will be able to work in the emerging society. Furthermore, the school "should develop techniques to identify and measure these knowledge and skills" (p. 135). Much like other educational policies and reforms, there is no doubt that digital education in Sweden, due to the diminished results of both international and national academic assessments since the late 2000s, has looked beyond the country's borders to find educational policy models and legitimacy for the implementation of digital education policy changes.

The Role of Digital Technology in Education

Digitalization as a Means for Achieving Equality and Equivalence

Following reflections on the previous top-down national IT strategy, which focused only on providing computers to teachers and equipping schools with computer labs for student use and led to slow IT development in schools, the focus of IT in schools has shifted to promoting technology's role in education's changing connection to its social missions. This strategy emphasizes the importance of broad and developed IT use and states that access to and effective use of IT should not be limited to education in the schools, but should also be important for everyday life and working life in society as a whole to enhance quality of life and make the workforce more competitive internationally. The concept of lifelong learning in relation to IT efforts emerged in the late 1990s (Ministry of Education, 2002).

It is argued that due to changes in society, the role of schools must be partly redefined. Schools play a compensatory role in IT development in society, which is important for the general task of giving everyone an equal education and achieving equality. However, according to the Ministry of Education (2002), there are a number of paradigm shifts that have taken place in recent years in view of IT and

education due to the Internet. It is thought that the discussion is no longer about the education system but instead the "learning process." Now it is no longer talking about "offering education" but "facilitating access for a variety of learners," not "technology" but "content and people," not "individual efforts and projects" but "exchange and collaboration," not "learning to use ICT" but "using ICT to learn." (pp. 20–21). The political arguments for expanding IT elements in education can therefore be seen as twofold: first, from a socioeconomic perspective, the workforce must possess IT skills, and schools should contribute to this. Investing in IT in schools is also necessary to provide students with civic competence. Second, IT in schools is a means for creating equal opportunities between students and thus helping to create an equal schooling by reducing digital divisions (SOU, 2014).

Another aspect of the importance of IT in schools connects to democratic values regarding gender equality. As early as the 1980s, gender issues related to women's use of computers were highlighted. It was necessary to increase women's interest in computer technology and to recruit women to study computer focused fields. Thus, the state and the Study Association initially made grants for special courses for women (Government Bill, 83/84:100). The issue of gender equality has been emphasized in most policy documents over the years. It is stated in the National Digitalization Strategy for the School System (Ministry of Education, 2017):

> The inclusion of an equality perspective in the work with digitalization is thus important for the opportunity to achieve the gender equality policy goal of equality education. In the work on digitization, it is therefore important to have an equality perspective to ensure that all children and students are given the same conditions and opportunities. (p. 7)

The importance of digitalization has also been highlighted in connection to special education. As the Ministry of Education (1986) stated in its action plan, "special attention is paid to questions about the computer as support for students with special difficulties and, among other things, studying how computer support can be used to support and improve the learning of disabled students" (p. V). Some efforts were already ongoing during the 1980s. For example, the government provided special schools and their resource centers with additional support and aid and gave them better opportunities to provide disabled students with computer based technical aids, including the purchase of equipment and software in the special school (ibid.). Due to these efforts, "the special school has during the 1990s become one of the most computer-dense educational environments in the school" (Government Communication, 1997/98, p. 22).

IT access for students with disabilities received a great deal of attention during the digitalization developments of the 1990s and early 2000s. This occurred in two steps: access to computer based reading and writing tools that students could manage independently, as well as access to the Internet and e-mail so they could gain knowledge source and the possibility of communication that creates completely new opportunities for participation and equality (ibid.). It is claimed that IT can contribute actively to creating openness and accessibility for children, adolescents, and adults with disabilities. Without accessibility of people with disabilities, "IT instead contributes to alienation, exclusion, and segregation" (Ministry of Education,

2002, p. 81). Government Official Report (SOU, 2014) referred to the Swedish School Inspectorate's review of the use of IT tools in 2012. This review cited reports from the National Agency for Education and the Special Education Agency, which stipulated that proper use of IT tools contributes to more effective learning through improved individual adaptation, increased motivation, and student collaboration. It also pointed out that modern IT tools have proven particularly valuable for teaching students who need special support.

Digitalization as a Tool for Effective Teaching and Learning

Arguments for investing in IT in schools have always been linked to teaching and learning, but the focus has varied over time. Policy documents from the 1980s revealed a strong focus on treating computer knowledge as a separate subject through computer instruction. The compulsory education curriculum from 1980 included teaching in computer knowledge i.e. teaching about computers and their use at the lower secondary level within the framework of first-hand mathematics, as well as social and nature oriented subjects. This computer education was aimed at informing students about the use of computers in society. It also emphasized the students' understanding of that technical aids are controlled by people. Computer education should also focus on computer functions and emphasize computer programs, tasks, and methods for problem-solving as stated in Government Bill 1983/84. Computers' practical functions were the particular focus of an argument for the importance of giving students access to computer education in two-year vocational programs (ibid.). It claimed that "In the long term, the opportunity should be taken into account to give the students an expanded teaching on mini and large computer environment with regard to system and program development. Computer communication should also be an essential element of this teaching" (Ministry of Education, 1986, p. VI).

Since the 1990s, technology's role in education has become more visible in governance documents, which argue that IT can constitute a new way of gaining and utilizing knowledge and contribute to the development of new teaching methods in schools, at a distance, in youth education, and in lifelong learning. IT's contribution to opportunities for distance education was highlighted as contributing to the dissemination of information about educational and technical opportunities and emphasizing good examples nationwide. IT was no longer treated as a separate subject in schools, but was expected to function as an integrated educational aid in all courses and subjects and for all students (SOU, 1994).

> All students in the school should learn how to use IT. In this way, the teaching environment can be renewed, pedagogy developed and learning improved. This releases the creativity of both teachers and students. It provides increased opportunities for personal development and success in the professional world. (p. 9)

Seeing IT as a teaching aid in teaching changed the view of teachers' roles and their competency required. The policy documents highlighted the importance of investing in IT professional development and training for teachers. This led to a national program for IT in school (ITiS) from 1999 to 2002. The program had two parts: the first gave teachers knowledge about computers, and the second, which was the program's focus, emphasized the use of computers as educational tools in daily activities at school. This part addressed how students could use computers in this context to gain various forms of knowledge (Government Communication, 1997/98:176).

Including IT in teacher education also attracted attention in the late 1990s by facilitating some reflections:

> But the experience of that work does not seem to have been systematically transferred to ordinary activities and many universities still seem to lack a conscious and in-depth discussion about IT's long-term impact on the school, the teacher role and not least the school subjects. An evaluation of the use of IT in teacher education, especially regarding the didactic discussion, would be desirable and possibly lead to recommendations on measures. (Ministry of Education, 2002, p. 37)

Research on computer use in teaching and learning environments usually emphasized and supported the use of computers as educational tools. The Ministry of Education (2002) referred to the Knowledge Foundation final evaluation report by the ELOIS group, which confirmed that the general perception of what occurs in the classroom is that teachers' roles have changed, students are more active and work more individually, and computers are integrated into teaching. However, it also reported that the use of computers to search for information on the Internet was so dominant that "IT is a versatile tool in single-track use" (ibid. p. 29). The Ministry of Education (2002) also cited another study, which indicated that "computer supported individual work under supervision hardly [is] an appropriate pedagogy for tomorrow's school. It probably leads to IT one-sidedness, depletion and increased stress" (pp. 29–30).

When such critical arguments appeared in earlier documents, later policies had a more positive view of IT use in teaching and learning. In its 14-page *Digitization Strategy for the School System*, the Ministry of Education (2017) used the word *opportunities* 27 times, while the word *Problem* was not mentioned at all. Digitalization in schools has been appreciated with the assertion that IT contributes to effective learning in terms of improved student achievement and reduced administration by teachers. Often, the benefits of technology relate to increased opportunities for teachers and students to access open and rich resources for teaching and learning, open communications, and networked and collaborative learning. Digitalization has created opportunities for individually adapted and flexible learning based on students' diverse conditions. When students and learning are at the center of education instead of teachers and teaching, digitalization is a decisive factor that influences the culture of education (SOU, 2014; Ministry of Education, 2017).

Digitalization as an Instrument for Global Competition

Since the 1990s, neoliberal thinking has dominated much of the restructuring rhetoric nationally and worldwide, leading to the economization of educational discourse. As a result, accountability, competitiveness, and performance (goals and standards) have led to the targeting of performance indicators as an important education reform strategy. In education, extended national evaluations and international performance tests (e.g., PISA, PIRLS) showed that Swedish students performed quite well until the first half of the 1990s. After that, and especially after 2000, results declined, particularly in mathematics and science. Policy documents since the mid-2000s have inevitably referred to these international standard test results to justify their demands for increasing the quality and efficiency of teaching and learning in Swedish schools. Integrating digital technologies into teaching and learning is regarded as one solution for reaching this goal because "IT is seen as a tool to increase learning efficiency. IT is said to be a catalyst for change that can make the school more flexible and increase the quality of learning" (SOU, 2014, p. 134). However, the document also stated that even though many studies question whether IT can improve students' school results and only few studies have provided clear answers, more research and evidence are necessary.

On the political level, digitalization in schools is regarded as playing an important role in helping train the future workforce and enhance innovation to succeed in international competition. It is argued that through the use of IT in schools increases opportunities for students to learn important future skills, such as critical thinking and creativity. In its policy document *National Digitization Strategy for the School System*, the Ministry of Education (2017) stipulated that one purpose of the strategy is that all students should have the opportunity to develop adequate digital competence. This, in turn, requires giving students the opportunity to develop their ability to use digital technology, which "is becoming increasingly important for the future working life" (Ministry of Education, 2017, p. 6).

The notion of digitalization, which is a central concept in IT politics, was first discussed and defined officially in a report by the Digitalization Commission on behalf of the Swedish government (SOU, 2014), which stated:

> Digitalization today is usually used in two different meanings. Partly as information digitalization, that is, the transformation of information into digital form, and partly as social digitalization, that is (increased) use of IT in a broad sense in society. (p. 28).

It is believed that digitalization and IT based solutions can increase the availability and efficiency of companies and public sectors, including education. The government's digital agenda reflects the need for both forms of digitalization, but its digital agenda and the establishment of the Digitalization Commission in 2012 were motivated primarily by a desire to promote social digitalization "to use it and its applications for increased innovation power, profitability and competitiveness" (SOU, 2014, p. 29).

Discussion and Conclusion

The development of digital education and digitalization in schools can be placed in the three periods linked to Swedish educational reforms over time, as suggested by Sundberg (Chap. 6, this volume). However, these timeframes need to be regarded as rather loose. Ideas do not shift instantly, so the suggested visible patterns in policy arguments can be related to and partly understood in terms of changing political circumstances over time and governing models with overlaps and recurring themes. Thus, certain topics are common in various documents from different periods.

Over the years, the hope or hypothesis emerged that digital education could strengthen social values such as gender equality and inclusion. Education for all and integration have been the main purposes and principles of the comprehensive education system since its establishment in the 1960s, which is connected to the Nordic education model characterized by a number of overall values such as social justice, equality, equal opportunities, integration, and democratic participation for all students regardless of social and cultural background and abilities (Imsen, Blossing, & Moos, 2017; Lundahl, 2016). There are discussions today about how this model relates to the changed conditions, as it seems that these values are influenced by the reforms that have taken place in the different Nordic countries. What has been common is that all these countries have flexible curricula and open-up learning objectives in conjunction with the trust in the teacher professionalism and the ability of individual schools to bring these values into practice. Thus, the main structure remains in the surface, as it is argued by Imsen et al. (2017). The result also implies that the Swedish government believes that digital education and increased technology use will increase opportunities for all to access knowledge and social participation, which can increase equality in schools in general and in gender quality in particular. Technology is also considered as an effective educational tool that can support the learning of children and young people with disabilities. However, technology may also entail the risk of preventing women from taking advantage of technology because the properties of technology are considered as more masculine in nature, and therefore it is important to pay attention to the gaps that may arise in technology use in education. Some researchers also pointed out that digitalization in schools has led to further undesirable consequences, such as in the case of digital divisions between children and young people, as well as their parents, due to different socioeconomic and cultural or linguistic backgrounds. Thus, the concept of digital exclusion has emerged in recent debates and research (Helsper & Reisdorf, 2017; Van Deursen & van Dijk, 2015).

In all policy documents, technological conditions are regarded as a basic prerequisite for the positive effect of digital education, regardless of which technology the documents address. From earlier years' focus on providing computers at school to access to software programs, Internet access, online learning resources, networked and interactive learning platforms, the one-to-one initiative, and access to databases for national and international comparisons, it is believed that digital equipment and resources, infrastructure, and supporting service systems are the most basic but

most important conditions for digital education. Investment costs money, so local economic conditions play an important role in development at the local and institutional levels. Digital education policies after the 1990s focused on pointing out the factors and dangers of increased inequality in digital education between various municipalities and schools. Research and investigations have also revealed differences between large and small municipalities, between schools in different areas, and between public and independent schools, not only regarding access, but also in terms of use and digital competence (SKL, 2016; Swedish Parliament, 2016).

Another area of attention in all documents is the importance of developing teachers' digital skills. This is considered as a basic prerequisite for digital technology use in classrooms to increase the effectiveness of teaching and learning. Since the 1980s, the state has invested considerably in teachers' continuing education in this field in various ways. It has also placed increased demands on teacher education related to future teachers' digital skill development. Later, it also emphasized the digital skills of school leaders and all school staff on the grounds that digital education is not merely a matter of individual teachers' skills and will or using technology in classroom instruction. Rather, it is an organizational and school development issue, especially given the increased national and international comparison and competition in the education market, which has increased demands for local accountability and self-regulating regarding education quality issues (Selwyn, 2016; Williamson, 2016).

However, there are some clear links between arguments presented in the various documents and the proposed governing models. The arguments apply to digitalization strategies and goals, as well as technology's roles and functions in education, as illustrated in Table 11.1. The normative ideal of the rationalist perspective on decision-making is based on trusting state actors' and agencies' knowledge and power derives from a centralized and universalized governance model (Lindblad & Lundahl, 1999). Policy documents from the 1980s provided clear evidence of this pattern, such as detailed recommendations on the number of students per computer and the number of hours and course points for teacher in-service training. Digitalization in schools also had a clear top-down strategy in which extensive state investment was distributed to the local without accounting for local needs and conditions.

Since the 1990s, the Swedish education system has undergone radical restructuring. Decentralization, marketization, and privatization place demands on local responsibility and self-control. The demand for local investment in digitalization in schools has increased, and the development of teachers' digital skills has become more locally adaptable. Quality and effectiveness have been the central concepts used in the policy documents with a clear link to neoliberal ideology. Digital education strategies have followed this trend with an emphasis on promoting the effective use of digital tools in teaching and learning.

Governing by results also became increasingly dominant after the 2010s, as measurable school and pupil performance became indicators for comparison and evaluation. Access to national and international big data also allowed local and individual schools to compare and control their own results as instruments for self-evaluation

and self-accountability for the school's quality work (Lingard, 2009; Ozga, 2016; Dahler-Larsen, Segerholm, et al., 2011; Souto-Otero & Beneito-Montagut, 2016). The use of international standards, benchmarks, and comparisons has also become an important manner to increase competitiveness in a global context, which is rooted in the belief of evidence-based practice. It is based on a logic that what works is that we can produce an output or an improved output if we deliver what we intervene into an already existing practice. However, the danger is to be contextless and eventually become one-size-fits-all. Instead of what works in the end, it is about how we can make it work (Adolfsson, Forsberg, & Sundberg, 2018; Kvernbekk, 2017). Arguments in digital education policy in the 2010s focuses largely on the statistical comparison of the results from the major international tests as a powerful evidence to justify the agenda and efforts of enhancing digital technology in education to improve the quality of education and the pupils' digital skills in order to increase their competitiveness in the future global labor market.

In conclusion, even though the digitalization of Swedish schools has been ongoing for somewhat 40–60 years laying the grounds for what today can be considered as digital education, its formation in policy and practice has not been comprehensively described in research. In this chapter, we have tried to capture this process using a rather narrow sample of policy texts in the area selected within the suggested timeframes by Sundberg (Chap. 6, this volume). We have analyzed the goals and strategies for commitment, initiative, and implementation of digital education proposed and argued for in the policies during these three periods, and we have related these to the role of digital technology in digital education as it formulated, expressed, and justified in the policy documents. The ambition has been to critically analyse how digital education policy changes can be understood in relation to various phases of Swedish educational reform. As education in Sweden becomes increasingly digital, understanding the origins of digital education is an important part of understanding the future trajectory of education at large.

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Part IV
Discussion

Chapter 12
Discussion: The Nordic Dimension in National School Policies and Transnational Social Technologies?

John Benedicto Krejsler and Lejf Moos

Abstract This volume analyses how social technologies – like evidence-based education, what works practices and digitalization of schooling – are being interpreted and enacted in the Nordic educational systems. The social technologies are often initiated by transnational agencies and networks outside the national systems, and in this context we are interested in detecting adaptations, responses and trends hereof in the different Nordic countries as well as exploring to what extent these responses share Nordic similarities. Therefore, we have also explored the question of whether – and to what extent – it makes sense to talk of such a thing as a Nordic dimension. Do we have five fundamentally different school and educations systems that exhibit sufficiently common traits, interdependency and mutual collaboration to justify talk about a Nordic model or a Nordic dimension in school and education policy? Is it a myth or a reality?

We do not want to produce yet another set of floating signifiers where concepts and findings are taken out of context and thus so vague that they do not really describe the phenomena. In line with this ambition, this chapter will sum up and discuss the contemporary and historical analyses of similarities and differences in national structures and discourses as they have appeared in the chapters of this book. We thus aim at contributing to developing a more robust foundation for analyzing the discourse of Nordicness in terms of social technologies, evidence, what works and digitalization.

Keywords Nordic dimension · Nordic model · School policy · Transnational policy · Comparative education

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Is There Such a Thing as a Nordic Dimension or a Nordic Model in School and Education?

This chapter will sum up similarities and differences among the Nordic countries, and discuss to what extent, if at all, it makes sense to talk of a Nordic school and education model. Furthermore, the chapter will evaluate the effects of how school policy has increasingly become part of larger transnational and international collaborations (OECD, EU, IEA and so forth), and how that works back on national models and 'the Nordic model'.

As documented in the chapters of this book there seems to be a widespread consensus that there is a Nordic dimension in national school policies that offers a critical mass to develop and qualify a wide variety of educational issues that are pertinent in each of the Nordic countries.

The chapters refer to what can reasonably be called a Nordic model in the sense that Nordic countries have historically constructed similar social democratically led welfare models with similar core values and political, cultural and economic aims and ideologies (Hilson, 2008). These social-democratically led models have relied on corporatism, a strong public sector and symbiosis between social movements and political parties; and the state professions educated by the institutions of higher learning have been entrusted with a vital role. In the Finnish thematic chapter, Rinne draws attention to the fact that a clearly social-democratic welfare regime was still the Nordic norm in comparison with other Western European nations up until the 1980s, before considerable recessions hit Finland in particular upon the fall of the Soviet Union in 1991 and Sweden as well:

> "In accordance with the Keynesian policy of "full employment", unemployment was kept low (4%), as against 10 per cent in the EU countries; more Nordic women were employed outside the home (more than 70% of women of working age compared to 50% in the EU countries), and the level of public-sector employment was higher (more than 26% in the Nordic countries compared with less that 18% the EU)".

In addition to Rinne, a number of comparative researchers have claimed that one of the dimensions of this model has been the Nordic or social democratic educational model, which has historically united the educational politics of the five countries (Blossing, Imsen, & Moos, 2016; Buchardt, Markkola, & Valtonen, 2013; Elstad, 2020; Telhaug, Mediås, & Aasen, 2006; Tjeldvoll, 1998). Tjeldvoll describes a particular "*Scandinavian education model*" as the model, the aim of which is to produce equal educational opportunities for all citizens. To a large extent, this educational model was strongly centralized at the national level in terms of the curriculum, examinations and governance until the 1980s.

On the other hand, the chapters also clearly demonstrate that school and education systems in the different Nordic countries have developed differently according to their own particular historical, geographical and social contexts. In Norway teaching of reading was made compulsory in 1736, but 7 year compulsory schooling did not follow until 1889. Denmark and Sweden were early to develop legislation for compulsory schooling for all children, Denmark in 1814 and Sweden in

1842. It took considerably longer to implement these ambitions. Finland, which was part of Sweden until 1809 and then a self-governing grand-duchy within Russia till 1918, did not institute compulsory schooling till 1921, a real late-comer in a European context as stated in the Finnish country report. Iceland with its close administrative dependence upon Denmark until 1918 passed its first law on compulsory education in 1907.

Denmark had private schooling instituted as part of its Grundtvig-inspired Friskole Act in 1855. Since then teaching has been compulsory but not schooling, and parents, religious groups and others were allowed to open up free or private schools as an integral part of a diverse school system. Private schooling thus developed early as an alternative to public schooling. And with the widespread trend of neo-liberal governance from the 1990s, supported by OECD policy advice and reinterpretation of autonomy, private schooling has by now reached approximately 18% of all students in basic schools. In Sweden, public schooling was looked upon during most of the twentieth century as a guarantee of equal rights for all children to quality schooling in a geographically large and sparsely populated country and, as a consequence, private schools were discouraged. Suddenly, however, in the early 1990s Sweden turned around and instituted rights to private schools that made Sweden a front-runner for private school corporations, including for profit schools, although this is increasingly contested. The situation concerning private school enrollment has developed differently in Iceland (less then 5% of students), and Norway (approximately 5%) and Finland with very few (app. 3%), most in international schools and schools based on educational or religious ideology (Skott & Kofod, 2013).

Nordicness: An Ambivalent Phenomenon Leading to Pragmatic Success

Comparing the five distinct Nordic nations that have developed along different trajectories historically but that, nonetheless, show striking similarities, this publication aims at mapping these particularities whilst simultaneously pointing to the considerable number of similarities that make it, we believe, reasonable to talk of a Nordic dimension – also in school and education – in a weak but nonetheless pervasive and lasting sense. This may sound almost like a contradiction in terms! In the post WW2 era all Nordic countries were developing mostly social-democratically led welfare states, more profoundly so in Sweden than in Denmark and Iceland, with Norway as a case in between and Finland as a more rural late-comer (Andersen et al., 2007; Hilson, 2008; Telhaug et al., 2006). Denmark, Norway and Iceland joined NATO from the start, Sweden remained emphatically neutral, and Finland was determined by its diplomatic relationship to its neighbour the Soviet Union. The Nordic countries attempted to create a defence union in the 1950s but failed. Denmark joined the EU in 1973, Finland and Sweden in 1995, but Norway and

Iceland have emphatically made a point of staying outside. Conversely, however, the Nordic Council was established in 1952 as a body for mutual consultation and collaboration with annual meetings of prime ministers. It was and is, however, 'only' a voluntary and consensus-oriented body with no supranational powers. In the wake of this collaboration, however, a growing number of collaborations have developed, in research, in environmental care, in coordinating mutual stances in relation to important international matters. In many capitals around the world the Nordic embassies can be found within the same compound, with Berlin as a well-known example. And within the EU you often see the Nordic member states coordinate with, inform and talk the case of the Nordic non-member states. Or, to put it shortly, the interconnectedness is so pervasive and wide-ranging that it would be counter-factual to say that there is no Nordic dimension, although this dimension is admittedly pragmatic and at times elusive. And what this publication demonstrates is that this ambivalent, pragmatic elusiveness is also manifest in school and education.

Pragmatic Collaboration Around School and Education

As convincingly argued in for instance the Icelandic country report, it appears hard to pinpoint exactly what makes up a Nordic dimension or a Nordic model in education. Nonetheless, it appears evident that policymakers, practitioners, and educational researchers have a long-lived tradition for collaborating in manifold ways as is the case within other policy fields as well. This happens as formal collaborations in the Nordic Council, in the Nordic Educational Research Association and so forth and it happens in informal collaborations among municipalities and schools as well.

So, when Nordic school policy advances and when we look for the rationale for improving (in comparative terms), we practically always compare ourselves, and very much so, to the other Nordic countries, as stated in the Icelandic report. This report refers to the extensive use of data from PISA about the other Nordic countries and refers to sizeable participation in the Northern Lights conferences and Nordic publications. Denmark had its first pre-PISA shock following the comparative IEA literacy survey in 1991. An important aspect of the reactions to Danish fourth grade pupils' mediocre literacy skills was that Danish policy makers and the public at large noticed that Danish pupils performed considerably worse than the Nordic neighbors with whom Danish usually compare themselves as it was phrased. As a result of these worries the so-called Nordlæs surveys from 1996 followed. Norway purportedly went from 'self-satisfaction' to a state of shock in the wake of publication of the results from the first PISA surveys:

> Average reading results for Norway were slightly above average, and similar to those of the Netherlands, Estonia, Switzerland, Poland, *Iceland*, the United States, *Sweden*, Germany, Ireland and France (OECD, 2011, p. 54) (in italics by authors)).

As mentioned in the Swedish country report, the disappointing 2007 PISA results led to new strategies for reforming schooling where previous "silent import" of policy ideas was replaced by explicit references to the Organization for Economic Co-operation and Development (OECD) and other transnational networks. Sweden had a further highly-publicized PISA-shock in 2012, whereas Finland surprised everyone and became the envied high-scoring model pupil of PISA as well as IEA surveys from the start (Krejsler, Olsson, & Petersson, 2018; Pereyra, Kotthoff, & Cowen, 2011; Sahlberg, 2011). These ongoing experiences from transnational collaborations and surveys supply the narratives that Nordic policy makers, educational researchers and public debate take in and continuously churn with a particularly stern gaze on how they do in comparison with the other Nordic countries and a never-ending amazement about the Fins.

International and Transnational Collaborations and the Nordic Dimension

An important aspect of evaluating a Nordic dimension thus has to do with Nordic nations' profound involvement in international and transnational collaborations. Nordic countries are very active in transnational collaborations in most policy areas, including school and education. This includes formal collaborations in the OECD, EU, IEA and the Bologna Process, and it includes collaborations in international educational development and research projects (Hultqvist, Lindblad, & Popkewitz, 2018; Krejsler et al. 2014, 2018; Moos, 2013).

As has been demonstrated by the chapters in this publication this also has the effects that all Nordic countries have been in their school and education reforms very influenced by trends emanating from these international and transnational collaborations. These collaborations are strongly dominated by Anglo-American networks and educational thinking (see Danish thematic chapter), as developed in the school effectiveness and improvement collaborations as well as the evidence and what works collaborations (Eryaman & Schneider, 2017; Krejsler, 2017, 2020).

This produces a number of problems for Nordic school professionals and educational researchers, as the education contexts and traditions in the different Nordic countries vary from the Anglo-American contexts and traditions that mostly frame the standards, surveys and conditions for comparability that govern transnational collaborations. To mention but a few of these difficulties, one could mention that Nordic school and teacher education traditions have been framed to a large extent by inspirations from continental traditions, German in particular, in terms of e.g. a strong didactics tradition, and a strong tradition for thinking the larger purpose of education in terms of a German-inspired Bildung tradition (Hopmann, 2015; Uljens & Ylimakii, 2017). One should not forget, however, that American progressivism at one end and Tyler-inspired Anglo-American curricular thinking at the other end have also contributed greatly to developing approaches to school thinking and

policy (Moos, 2013; Popkewitz, 2005; Tyler, 1949/1971). Again, this varies from country to country, with Denmark probably being most inspired by German influences and Sweden less so.

Furthermore, many Nordic researchers express that it is often difficult to go 'international' in an educational world dominated largely by Anglo-American standards, procedures and values. Here Nordic educational researchers often face dilemmas like the following: You have to make your articles a little exotic by appealing to what you sense will make your writing attractive to a larger mainly Anglo-American audience, i.e. appeal to 'myths' about the Nordic welfare states, progressive pedagogy, gender and social equity, and the like. Or you face the problem that your research is hard to translate to an Anglophone audience: How do you translate central terms like 'pedagogik', 'dannelse/danning/bildning/Bildung', 'Geisteswissenschaften', 'didaktik' and so forth? Here the critical mass of a larger Nordic community of educational researchers as well as the critical mass of three Scandinavian languages that are largely mutually comprehensible (Norwegian, Swedish, and Danish) contribute to making the region more visible and come in handy for many when engaging in the work of qualifying the experiences and thinking that are brought from each of the five different national Nordic contexts. The Swedish country report goes into depth with problematizing and mapping how the genealogy of a national Nordic school and education context is deeply dependent upon particular national trajectories such as: how did pedagogik/education evolve as a discipline of knowledge; how did national key persons (e.g. Torsten Husén) engage with international collaborations, and how such collaboration worked back on Swedish school policy and educational thinking. The country report also takes up how the recent struggle between 'pedagogik' and educational science (utbildningsvetenskap) relates to this debate and contributes to reframe education as an academic discipline with considerable impact on school policy and teacher education. This latter debate about educational science and its Anglo-American borrowings exists in all Nordic countries, albeit according to different but similar trajectories (Säfström & Saeverot, 2015; Sundberg, 2007). In some places this discussion plays out as a struggle between two discourses: A Democratic Bildung discourse and a competition state discourse (see the Danish country report, here) (Moos & Wubbels, 2018).

In school policy PISA and IEA surveys have contributed to the passion of Nordic countries comparing themselves to each other, as previously mentioned (S. T. Hopmann, 2008). Before 2000 and PISA, Sweden and Denmark have traditionally been looked upon as being international champions of a Nordic model of progressive and child- and equity-oriented pedagogy that has attracted considerable international attention. From the onset of OECD's PISA surveys and IEA's PIRLS and TIMSS surveys around 2000 the balance between Nordic school and teacher education systems has been turned around in the sense that Finland now occupies the position as the envy-producing high-achieving school system that receives high-level international attention and visits, proving that East-Asian achievements in literacy, numeracy and science can be achieved with Nordic strategies. Simultaneously,

Sweden, Denmark, Norway and Iceland have apparently fallen behind and mostly only achieve average or below average scores.

As teacher education is closely related to school policy, and school reforms very often lead to teacher education reforms, it makes sense to mention a few key points about similarities and differences in current Nordic teacher education policies and their insertion into the transnational Bologna Process in particular (Elstad, 2020).[1] Finland already - and successfully - made teacher education into a master degree in 1979, which was decades later to become an inspiration for Iceland and Norway in particular. In 2008, Iceland made its teacher education programme a master's degree, but has since then backtracked to some degree and made fast-track variants as it became problematic to make sufficiently many students write and pass the master thesis. In Norway, from 2017, teacher education programs for primary and lower secondary school were also transformed into 5 year master programs, which are offered at regional colleges and universities. Time will show whether this reform suffers similar consequences to what Iceland experienced. In Denmark, however, teacher education for primary and lower secondary education qualifies as a so-called professional bachelor's degree, after having adhered for longer to a less academic and more Grundtvigian-inspired seminary tradition. Concerning higher secondary school, in Denmark and Norway, students have to take a master's degree at a university and a subsequent post-graduate course in education, which in Norway also qualifies for teaching at the lower secondary school level. For several years there have been deliberations in Denmark to establish a 5 year teacher education program at master level concerning primary and lower secondary teaching, albeit with little success so far. Sweden is somewhat in between with pre-school and primary school teacher degrees qualifying as bachelor's degrees whereas advanced lower secondary teacher degrees usually qualify as a master's degree, which degrees aimed at higher secondary level education usually does as well. In that sense, all Nordic countries increasingly adapt to the Bologna Process standard of including teacher education in the lifelong learning 3 (bachelor) + 2 (master) cycles, albeit according to differing models (Elstad, 2020; Klette, Carlgren, Rasmussen, & Simola, 2002; Krejsler et al., 2018; Rasmussen & Bayer, 2014; Skagen, 2006).

Social Technologies: Evidence and 'What Works' in a Nordic Guise

The evidence and what works agendas thus meet the different Nordic contexts with urgent needs of being re-contextualized from largely Anglo-American standards-based, test-oriented and curriculum-oriented paradigms to Nordic contexts where

[1] We appreciate the assistance of Eyvind Elstad, professor at the Department of Teacher Education and School Research at Oslo Unicversity, in settling the delicate details of differences between teacher education programs in the different Nordic countries.

didactics, Bildung and reform pedagogy and so forth had hitherto played a larger role, albeit with national differences. In school and education contexts this agenda has largely been driven by external agents from above, closely related to government-agendas and their embedding in transnational collaborations, the OECD, the Bologna Process, school effectiveness networks and the Campbell Collaboration in particular.

Denmark and Sweden were hit hard by these attempts to change the agendas for knowledge production. In Denmark, for instance, the Danish Clearinghouse for Educational Research was established in 2006 upon a government-commissioned OECD Country Report on the quality of Danish educational research (R&D) in 2004 (OECD/CERI, 2004). The report's findings pointed to Danish educational research being of too little utility to policy makers and practitioners, of having too little capacity in prioritized areas for school policy, and recommended drawing inspiration from largely Anglo-American approaches to evidence and what works. The clearinghouse had some limited success in influencing educational policy agendas, but only after adapting somewhat to established educational research in Denmark. Symptomatically for the ensuing problems of re-contextualizing largely Anglo-American agendas the Danish Clearinghouse for Educational Research was closed down in 2019 (see Danish thematic chapter). Similar attempts to change how educational knowledge is produced were seen with the establishment of the Swedish Institute for Educational Research in 2015, which was the result of a similar pressure from the Swedish government and educational administration authorities to have Swedish school and education more based on evidence for what works. Also here established Swedish educational research was by-passed and seen as non-cumulative, non-transparent and methodologically flawed, and – in addition – unresponsive to practitioners' needs for guidance about 'what works' (Adolfsson & Sundberg, 2018) (see Swedish country report). In 2011, the Norwegian Knowledge Center for Education was established commissioned by the Ministry of Education and Research (from 2019 part of the University of Stavanger). It serves a similar purpose as the Swedish and Danish counterparts in assembling and disseminating national and international research ranging from pre-school to higher education as well as developing the genre of knowledge surveys.

Nonetheless, the evidence-agenda, although it sounds rhetorically nailing with its imperative of establishing knowledge about what works, has in real life become much closer to a *floating signifier* in its far-flung attempts to gather a large array of approaches that claim to be objective and reliable to policy-makers and practitioners in particular (Eryaman & Schneider, 2017; Krejsler, 2017; Laclau, 1993). The chapters in this book thus point to a wide array of sources that count as evidence when it comes to the actual approaches being practiced in Nordic countries. Most thoroughly, the Icelandic thematic chapter castigates, how Icelandic school and education policy has always – since the 1300 hundreds (sic!) – been haunted by the specter of evidence for what works in an panoply of actions ranging from royal inspections, confirmation tests, achievement and intelligence tests, statistics, and lately PISA and PIRLS/TIMSS and other transnational comparative surveys intended to nail high achievement and identify best practices (Jónasson, 2016). The evidence-agenda thus clearly merges with national traditions in the floating signifier pursuit

of establishing discourse about what works. All Nordic countries have been hit by John Hattie and 'Visible Learning' as a comprehensive evidence concept that promises practitioner-relevant knowledge about what works (Hattie, 2009). But then again the New Zealand originated approach is 'softer' than the hard-core Campbell Collaboration approaches that got greater traction in England and the United States, in that it is less prescriptive and allows more room for context and professional discretion. In that sense, Hattie and other mainly softer Anglo-American school improvement inspired approaches appear more malleable to Nordic sensitivities; they go along well with more narrative and often German-inspired approaches to telling what research says about teaching and education that get incorporated into the evidence moniker, such as e.g. Andreas Helmke and Hilbert Meyer's work (Helmke et al., 2008; H. Meyer, 2004; Robinson, 2017; Townsend, 2007) (see Danish thematic chapter). We do see a number of mostly American packages that claim to be evidence-based or -informed, often based on behaviorist, cognitive psychology or similar paradigms, such as Parent Management Training Oregon (PMTO), The Incredible Years and Positive Behavioral Interventions and Supports (PBIS [in Norway, Sweden and Denmark called PALS: Positiv Atferd I Läringsmiljö och Samhandling]). However, we also see that evidence approaches get recontextualized into fitting Nordic more systemic consensus and community oriented educational fittings, such as e.g. Norwegian Thomas Nordahl's LP-model (Learning Environment and Educational Analysis], which has gained considerable traction in Norway as well as in Denmark.

The Neo-liberal Turn and Its Impact Upon School Policy in Different – but Similar – Nordic Contexts

All Nordic school systems have been profoundly influenced by the neo-liberal reforms that took off in the 1980s and 1990s and were, since then, intensified under keywords like decentralization, local autonomy and centralized standards for assessment, national strength, accountability, quality, effectiveness and efficiency (Blossing et al., 2016; Hultqvist et al., 2018). This has happened according to trajectories that show striking differences as well as similarities among the different Nordic countries in terms of public governance and the use of social technologies, as this section will demonstrate by summarizing key features from the chapters. Restructuring of public sector governance has been a major issue in the Nordic countries for the past 30–40 years, since the beginning of what is often called the neo-liberal, marketplace era. The European Union has played a big role in that process by launching the European Single Market in 1993 with its 'four freedoms' in an ever more deregulated Europe. The OECD has been an important facilitator hereof, in advising governments to decentralize authority to lower levels of governance and, simultaneously, strengthen steering from the center (OECD, 1995);

in addition the OECD issued advice on how to construct connections between levels of governance by means of contracts (OECD, 2016).

This development becomes evident in the Danish country report that elucidates how the national government, Local Government Denmark (the association of Danish municipalities) and municipalities have aligned ever more cohesively with the government's neo-liberal priorities in order to reform school. This became particularly visible during the large-scale conflict in 2013, when so-called three-party negotiations collapsed between the Danish Union of Teachers and Local Government Denmark. Three-party negotiations refer to the Nordic tradition of building consensus in the job market between unions, employers and government instead of streamlining working conditions, salary and so forth via extensive government intervention. When negotiations broke down, government intervened and pretty much implemented employers' (i.e. municipalities) demands as law. This meant that teachers' working conditions, relations between principals and teachers as well as organization of daily school life were changed substantially to the detriment of professionals (see Danish country report). The public sector is being disintegrated into semi-autonomous units that need to compete with each other according to contracts with clear, detailed aims for the production and measurement of results. Often pecuniary rewards were introduced in the move in order to incentivize the management of public institutions. In the construction of this kind of New Public Management abroad panoply of social technologies is employed. In order to make aims appear robust in public and management perspectives, and easily measurable, such technologies are often legitimized as being evidence-based and based on numbers or in line with models of what works. Extensive use of such technologies is seen to produce political and governance legitimacy. Digital technologies are often introduced when testing and educational programs are employed, and digital learning platforms are implemented.

In the other countries we see similar governance tools and social technologies being introduced. The Finnish country report describes how the government chose to pursue neo-liberal policies to a very large extent with a focus upon accountability and competition, management by objectives and assessment. The instruments were most often technical and incremental policy initiatives rather than being loudly announced as neoliberal reforms. Finland has been the OECD's 'model pupil' and been eager to participate in collaboration with the OECD. International comparisons like the PISA have had major influence and given top rankings to Finnish schools. This has happened, however, in combination with the traditional Finnish culture of trust, local authority and the beliefs in professional competences. The effects of the implementation of neo-liberal and transnational school policy has thus been mitigated by the fact that Finnish municipalities have used their leverage to favor welfare, equity and other Nordic core values as well as autonomy to schools and education professionals (see Finnish country report).

The Icelandic country report describes how educational decentralization in compulsory education is framed according to national traditions and needs. Decentralization is one aspect of the New Public Management trend in education policy in combination with more privatization of public institutions. Therefore,

authority is being transferred from the state to municipalities. These autonomy trends were, like the PISA testing, often ideas, social technologies and policy advice from the OECD that made their way into compulsory evaluation and reporting systems that form links between individual schools and the municipal authority and the ministry, all with due references to evidence and what works. In total, this has served to securing particular understandings of 'quality' in education. The country report describes how compulsory schools became more hierarchical and business-like after the implementation of the reform in 1995 and an emphasis on performance management and efficiency increased. Approaches to evaluation and documentation of quality have, nonetheless, in their re-contextualization to the particularities of an Icelandic context drawn on a historical tradition of evaluation, testing and inspection that boasts a long genealogy with references to the Pietist church of the eighteenth century and further back. Formal, national and international comparisons are most often combined with local and professional evaluation actions when arguments for the development of education are developed to suit ways that make sense to local Icelandic needs and understandings.

The Norwegian country report describes how the government has been collaborating closely with transnational agencies like the OECD for years and reconstructed public sectors on the basis of this inspiration. The international comparisons of students' literacy, numeracy and science skills, like the OECD's PISA surveys and IEA's TIMSS and PIRLS surveys, are thoroughly configured to interact with the national context, structure and culture. Norway is divided into more than 400 municipalities, most of which are very small, which has made it difficult to construct a governance model that covers all municipalities. This is why the market model has been introduced with a focus on local autonomy and supervision from the state. In 2004, the government issued a new governance model with a focus on deregulation, efficacy, competition and accountability. Here performance data are used and, subsequently, delivers the argument for the need for evidence in education, which in turn raises demand for best practice programs from transnational agencies, firms and consultancies and so forth.

According to the Swedish chapters, the Swedish school system was for many years centralized and state governed. During the 1990s, however, governance was in a turnaround mode transferred to the municipal level in a particularly Swedish adaptation to the international neo-liberal and New Public Management turn. In addition free school choice and the subsequent establishment of independent and private schools were allowed and subsidized. Therefore, management by goals and governance by results were also introduced in order to adapt and consolidate the Swedish tradition of rational planning of the welfare state. Performance accountability became a central feature of educational governance, which pushed the focus on evidence and what works practices up front. As noted in the Swedish country report the well-known state commission tradition with parliamentary committees, which allowed for long trial periods and produced thorough and well-researched reports as the point of departure for school and education reform, has been significantly reduced in this process and largely replaced by one-person commissions adjusting to the contemporary fast language of policy-making.

Similarities and Differences in Nordic School and Education Governance

Reading the book's chapters on five Nordic educational systems in an era of transnational influences towards a global, neoliberal marketplace reveals many similarities: All of the Nordic school and educational systems are based on and still aspire to perform versions of the vision of a welfare society, albeit with considerable variations. They are all built on a division of power between the central level, the state, and local levels, municipalities, which was in many ways anticipated in an OECD report from 1995, *Governance in Transition. Public management Reforms in OECD Countries* (OECD, 1995). Major tools or instruments – social technologies – for this are in most cases quite similar across the Nordic countries, based on faith in numbers, evidence and what works. Among initiatives from a number of influential transnational agencies and networks, some key OECD initiatives could be mentioned like the PISA survey; the annual information and influence flow in the *Education at a Glance* report; *Improving School Leadership* reports, and many additional reports and guides.

It is worth underscoring, however, that this picture is not a general model of policy and even less so of practices. Danish, Swedish, Norwegian, Icelandic and Finnish policies represent five different trajectories. All build on the vision of a welfare state, but Danish society and governance are more decentralized by tradition in a society of small and medium size enterprises whereas Swedish society and governance are built on more centralized models in a society of large enterprises where a belief in large-scale rational planning prevails. Norway, which is like Denmark a society of small and medium size enterprises, like Sweden located in a sparsely populated country geographically, but unlike Sweden and Denmark has a tradition with a large focus on the regional policy dimension. Throughout history, the municipal level has thus played a strong role alongside a tradition of 'implementation from above' in Norway, and educational institutions have had an important role in ensuring survival of small and geographically dispersed communities. Iceland as a sparsely populated albeit urbanized island with a traditional dependence upon fishing and agriculture is a late-comer in developing a coherent educational system. It is nonetheless today highly digitized and highly integrated into international and transnational agencies and networks. Finland, like Iceland, is a booming late-comer that only became an independent country in 1917, and was until very recently an agrarian country. It has been, furthermore, very dependent upon its geographical location between Sweden and Russia, and only developed its internationally envied school and education system very recently. Consequently, interpreting and even more so, enacting policies or transnational policy advice, are in all cases subject to the contexts and culture, traditions and discourses of practice, be they national or municipal, or be they institutional and professional (Ball, Maguire, & Braun, 2012; Blossing et al., 2016; Elstad, 2020; Telhaug et al., 2006; Tjeldvoll, 1998).

However, the interpretations and enactments of transnational policy advice seem to be re-inventing Nordicness in new guises as the similarities in contexts and cultures as well as the continued historical interaction and intervowenness still give momentum to close collaboration and similar solutions. There are Nordic networks of collaboration on national and municipal policy-maker levels, and on education and governance research levels and so forth. In odd ways it appears that school and education policies are in many ways growing more Nordic by adopting transnational discourses, technologies and models, albeit via an external interlocutor.

Digital Potentials and Disruptions to Nordic Contexts

In this section we summarize the theme of digitalization, which is closely linked to the evidence and what works technologies, and which occupy a major role throughout the chapters of this book.

Digitalization has become a big issue in all Nordic countries that all count among the most digitized societies world-wide. Pupils increasingly use digital platforms and social media at school as well as privately. Schools often pay for iPads and similar hardware for pupils with a Nordic equity argument in mind that access should not be dependent upon pupils' and their families' social and economic status. The use of digitalized technologies and platforms facilitates the harvesting of big data, enormous number of data on students' outcomes that can be harvested with algorithms and made use of in the development of learning materials and governance models. The authority, consultancy or owner of the technology or platform can prosper from this. One example of this mechanism is the deal that Google made with Danish municipal authorities. Google facilitated that authorities could buy simple laptops very cheaply and using Google's cloud software – for free. That is of course not a correct description: it is for free if one thinks money-wise, but not if one thinks data-wise, because the big data produced by students can be of great value for Google (see Danish country report). Such issues become particularly pertinent when Nordic national school systems increasingly collaborate with tech-giants like Google, Facebook, Microsoft or Amazon (Krejsler, 2021; Williamson, 2013, 2017; Zuboff, 2019).

The particular developments of digitalization in different Nordic educational systems have many similarities across nations:

The Danish policies on digitalization comply with many aspects of the general governance trend. The use of contract-models with the need for measurable standards and assessment technologies that are suitable for accountability (e.g. international testing and comparisons) are greatly facilitated and expanded by the large-scale introduction of digitalization. The development and implementation of digital learning platforms for the school learning-outcomes reform in 2013 is the latest step of this development that combines many contemporary social technologies in the governance of education and schools. The Danish national testing of students which started up in 2006–2007 is carried through as individually adaptive digital tests, which are, however, suspected of not being sufficiently valid to be used

for educational purposes in the individual teacher pupil relation. For several reasons they were put on stand-by in 2019 upon considerable critique to be resumed in revised form later.

Analyses of Norwegian policy documents leading to a national school reform of 2015–18 focus on introduction and dissemination of digital technologies and forms of thinking best practice and quality assessment, output and evidence-based policies that are based on recommendations on digitalization in the 'Act on Knowledge Promotion' from 2006. At the municipal level policy makers have increasingly decided that every student shall have their own iPad or computer. The ongoing development of portable internet-connected devices has resulted in a steady expansion of one-to-one projects - initiatives enthusiastically supported by the technology industry.

Policy documents spanning a 20–30 year period in Swedish education policies show that initially policies were centralized and top-down strategies, like public policies in general. Later on, in line with the general trend of decentralization, marketization and accountability, as advised by the OECD and other transnational agencies and networks, there is more focus on local responsibility and self-regulation supported by research-based evidence and international comparisons. This applies to digitalization policies as well. As argued in the Swedish thematic chapter digitalization is used to cover a number of central policy foci: (1) there is a focus on integrating the very Nordic social-democratic inspired focus of social equality, gender equality and equal access throughout the country; (2) ICT is discursively aimed at becoming a tool for effective teaching and learning, and (3) digitalization is conceived of as an inevitable precondition for ensuring Sweden's position among globalized knowledge economies of lifelong learners.

Finland has experienced similar societal developments as her Nordic neighbors. But the balances between centralization and decentralization have been different. The Finnish education system has stepped fully into the 'audit society' with steering at a distance and remains today the 'model pupil' of the OECD, heeding the policy advice of the OECD better than other nations. Distinctively Finnish, however, is the use of soft governance with a focus on local autonomy in implementation of regulations. Local autonomy has been framed by national quality and accountability models where digital data are used extensively.

The participation of the Nordic countries in transnational collaborations and networks provides inspiration, peer pressure and policy advice that give direction as to how reform policy with respect to digitization and digitalization takes place. This takes place in the EU with its focus upon making Europe a leading knowledge economy region, which obviously includes the aspiration to catch up with the United States and China on digitalization, Artificial Intelligence and so forth (Krejsler, 2018, 2019; Williamson, 2013, 2017). And, within the EU Denmark, Sweden and Finland often coordinate issues with Norway and Iceland as non-members. The role of the OECD in relation to the Nordic countries is clear; a simple but efficient system that builds on economic and governance ideas has been developed throughout the years. The OECD shares and disseminates experiences and ideas across all member states and interprets them according to neo-liberal market place logics and New Public Management ideas in order to give nations advice on

how to reform their public sectors. In addition, the OECD develops social technologies like international standards, and measurements, like the PISA, for nations to govern themselves effectively and efficiently. And here digitization and digitalization play an increasingly important role. We now have an e-PISA and interactive digital platforms like PISA for Schools and so forth (Meyer & Benavot, 2013; OECD, 2019; Pereyra et al., 2011; Ydesen, 2019).

Conclusion

In summary, this publication provides rich accounts of how different Nordic national school systems and the associated school policies and reforms navigate in changing times where national systems are challenged by the increasing integration into transnational collaborations and global contexts. As shown, this provides potentials as well as pitfalls that the five Nordic countries navigate according to different trajectories, according to their different historical, geographical, social and educational contexts. It has been illuminating in this work to dig out, nonetheless, the striking amount of convergence and collaboration in formal and informal contexts that collectively paint a picture of a Nordic dimension that emerges. It is a picture of a gradual construction of pervasive and lasting collaborations and contacts that are mostly voluntary and pragmatic, and at times almost elusive, but in an overall evaluation definitely there as a powerful phenomenon that merits the term the Nordic dimension, although some even talk of the Nordic Model (Andersen et al., 2007; Blossing et al., 2016; Buchardt et al., 2013; Elstad, 2020; Krejsler et al., 2014, 2018; Telhaug et al., 2006; Tjeldvoll, 1998).

As the chapters have delved into the details of the different national models and developments in school policy and practice as well as how they interact with external influences from transnational agencies, other Nordic countries, Anglo-American influences or internal historic and incremental developments, it has become ever more evident that there are no simple answers as to what drives developments of national school policy and practice.

The Icelandic country report pointedly asks: “Are the developments we see primarily due to specific acts or ordinances dictated by governments at the time, or external policy pressures or are we essentially witnessing rather gradual developments of a slow moving robust system?” They conclude that the latter probably plays the larger role, and does this with reference to David Tyack and Larry Cuban’s allusion to the inertia of schools and school systems to the high hopes of school reforms (Tyack & Cuban, 1995). They argue that very similar changes took place in all the Nordic countries, but that these affinities were not due to policy borrowing as such but rather to similar underlying dynamics within the respective systems in the different Nordic countries.

The Swedish country report moves along a similar but slightly different explanation in relation to how education and educational research and hereby the understandings that inform school policy develop along lines that are very national and

incremental, but, nonetheless, very influenced and shaped by how this national trajectory interacts with international and transnational networks.

The Danish thematic chapter dives into understanding how Anglo-American understandings, standards and social technologies deeply imbue transnational knowledge production and understandings of school and education, whilst simultaneously underlining the powers of re-contextualization when transnational policy adapts and transforms as it is brokered into what is politically and educationally possible in particular national contexts.

This is not to say that transnational trends like the neo-liberal turn and its associated New Public Management technologies do not matter. As is clearly visible in all country reports, transnational trends do matter a lot as being agenda-setting for what policy-makers, administrators, educational researchers and so forth meet around. The point is, however, that the processes of de-contextualization from particular contexts that take place in consensus-producing negotiations and collaborations in the OECD, the EU, the IEA and so forth are only possible when they focus upon finding the level of commonalities that can bring different national points of view together. This, nonetheless, gives direction to what participants from the different member-states of transnational agencies or networks bring back to their national contexts, where it must, however, be re-contextualized in order to make sense in particular Danish, Finnish, Icelandic, Norwegian or Swedish contexts. As demonstrated, however, this re-contextualization takes impressions from this transnational knowledge production, comparative surveys, social technologies and so forth, as national debates and policy making advance. AND, when Nordic countries make themselves comparable they are mostly oriented to how they compare to the other Nordic countries, as clearly argued in the Icelandic country report and throughout this book.

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