

Joaquim Azevedo

The world's education system

Essay on the
transnational regulation
of education

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Introduction

Why don't we start with some questions?

Why are education results of countries such as Finland so often invoked to justify national education policies? Why does the annual publication of the PISA results or of the OECD report *Education at a Glance* have such a strong political impact and why does it find such a meaningful echo in the media?

Is it not possible that the widespread publicity around the PISA results is influencing national education policies? And what about the way it influences schools and headmasters, classrooms and teachers' pedagogical practices?

In the context of the European Union, are the consequences of adopting the "Lisbon strategy", the "knowledge-based economy" and of committing to the goals – to be achieved by 2010 and by 2020 – of the ensuing Work Programme for the national political agendas, for the rhetoric of various social actors and for establishing priorities when it comes to allocating resources not clear?

If it were not for OECD's efforts, would so many of our national political minds be busy studying the Finnish model of education, now the subject of several international field trips?

What are the dominant logics behind the influence on national education policies of the major international agencies (OECD, UNESCO, European Commission, World Bank)? What mechanisms are employed to guarantee this influence?

The idea that in order for us to understand education, its systems, its policies and processes, we are required to overcome nation-state borders is nowadays a rather obvious one.

In a context of growing globalization, it is imperative that we ask new questions, that we examine education as a social and political realm of action on the basis of this set of influences, causes, effects, processes, results and doubts.

We have been focusing on the local dimension of the issue for too long and now we must analyze the situation in each country and in each school in light of the concept of the "world's education system".

Relying on our work about secondary education in Europe (Azevedo, 2000), this text brings up the debate concerning the theory of the world's educational system, which we formulated then. As time goes by and globalization presents itself as an

advancing and dominant dynamic, this theory has shown to be relevant and pertinent as an explanatory framework for national education policies and as the future ground for a critical stance on the formulation and evolution of education policies taking place all over the world.

It has therefore seemed appropriate that we return to the description and interpretation of this theoretical contribution, and in doing so we have widened and updated its bibliographic base.

Indeed, the evolution of national education policies anywhere in the world tends to be the expression of a continuous, tense, silent e almost imperceptible social construct, regulated by the world's educational system. It acts as a perfume that pierces through national, regional and local vests – quick to reveal magic and legitimating fragrances – but its source is far from being the local, regional or national.

This problem is controversial and it is part of a global power struggle, in which the standards of modern educational institutionalization and the ideologies that support them have replaced every preexisting education model and are nowadays perhaps the strongest legitimating force of national education reforms. Notwithstanding the persistency of high levels of “social cohesion”, which characterizes these reforms (mainly in terms of their execution), this theoretical reflection aims at affirming the growing influence of the world's educational system on national, regional and local education policies. This process has also an effect on the global tendency towards the assertion of national, regional and local peculiarities, known as “glocalization”.

Following several approaches to national and local (or sociocommunitarian) regulation of education, it is now time to introduce a third perspective on the transnational regulation of education. It is important that we do so not only as someone adding an extra leg to the table, but as someone who is aware that this new leg will greatly influence the (un)balances taken into account up to this point. With the present essay we hope to prompt the scientific community to analyze, apply, criticize and develop this theoretical referential.

I am grateful to several authors who have introduced me to this issue; we scientific researchers are all heirs. I thank José Pedro Amorim for his role in updating the bibliography and José Matias Alves for his careful reading of the manuscript.

Porto, September 2007

“There will be great winds through which the eastern things will become western, and those of the south mingled together in great measure by the course of the winds will follow these through distant lands.”

Leonardo da Vinci (2006¹, p. 26)

Establishing our research on secondary education in Europe (Azevedo, 2000) as our starting point, it becomes necessary to face a recurring issue that involves explaining the movement of curricular integration and secondary education despecialization – which takes place roughly at the same time in several European countries² – by questioning now both the fact that it evolves in the context of an apparent international convergence and its surprising homogeneity (Hüfner, Meyer & Naumann, 1992; Meyer, 1992c; Meyer, Ramirez, Frank & Schofer, 2006). Why were different countries – with singular national cultures, with dissimilar levels of social and economic development and with disparate positions in the world's society and with regards to the international division of labour – so much alike when it came to *rebuilding* their secondary education models in the early 1990s? It could hardly be called a coincidence. There are theoretical contributions which analyze and explain these phenomena, mainly as abstract and globalizing ideologies that structure the multiple reforming efforts undertaken by nation-states.

In the present essay we will bring forward theoretical contributions which, according to institutionalists, help explain the development of national education systems, as well as the way in which, according to several economists, the theory of the world's system has been adapted to the field. We will adopt an important part

¹ The date of the original text is unknown; nevertheless, it was probably written sometime during the second half of the fifteenth century or the beginning of the sixteenth century.

² Our essay concerning secondary education in Europe focused on education reforms implemented throughout the 1990s in nine European countries (a summary can be found in the UNESCO's journal *Prospects* ([Azevedo, 2001])). All these reforms – which took place in several countries at the same time – included, among other aspects, a “despecialization” of the educational offers at this level of teaching and training. This “despecialization” – which meant a drastic reduction in the number of courses and specializations in technical and early vocational training, as well as processes of installing and reinforcing mandatory common core subjects – was vast, profound, it happen simultaneously, it was based on common political grounds and it presented a similar technical formulation. National diversity was, and still is, maintained but this phenomenon is nonetheless surprising, particularly with regards to its simultaneity and similitude.

of the theoretical elements that have been put forward and our goal is to build our own explanatory framework to show how the “world’s education system” is assembled and how it operates. This framework is crucial to the understanding of national education reforms, particularly in regards to the structural similitude and synchronism that mark their political formulation on the international stage.

It is important to keep in mind that the analysis of the secondary education reforms is limited to their formal component and normative enunciation. This strategy does not ignore the analysis of the isomorphic effect and ideological adherence, but it is still just a degree, perhaps the first, as McNeely (1995) reminds us, of the research on the impact of the “world’s education system” for the institutionalization of national education systems. Both the similarity in the underlying rhetoric – statements of reasons, social contextualization and general goals –, whose main traits are almost the same in every country, and the simultaneity of its declaration show not only a relative ideological consensus regarding national education policies in different countries, but also a progressive degree of standardization of organizational structures and curricular models.

Several authors begin by noticing and highlighting these tendencies concerning the growing attraction of general education, the integration of vocational training within the realm of general academic education, the despecialization and the deprofessionalization (Azevedo 2000). We would do good to keep in mind Lauglo (1983), Inkeles and Sirowy (1983), Enguita (1986), Keeves (1987), Jallade (1988), Husén (1990), García Garrido, Pedró and Velloso (1992), Pedró (1992), Leclercq and Rault (1992), Kovács (1993), Papadopoulos (1994) and Costa Rico (1995), just to name a few. A considerable part of these, plus others authors, go even further and argue that at the same time a growing convergence takes place between education systems and that this is how they reform and reorder.

Torsten Husén notes a “growing convergence” (1990, p.40), at least in developed countries, between the three education and training models: school, dual and non-formal (*vd.*, for more on this issue, Azevedo, 2000). García Garrido et al. (1992), in their study about the current evolution of education in Europe, point out that the recent cautious curricular reforms, while maintaining institutional differences, have resulted in similar – to an extreme level – secondary education contents, regardless of the kind of education center where students learn, and they conclude by adding that the foreseeable future is likely to bring greater levels of curricular convergence. Inkeles and Sirowy, despite underlining divergences in national education policies, also emphasize the tendency towards convergence, regarding both structures and common practices, and characterize it as being “broad, deep and frequently accelerating” (1983, p. 303). Other authors call our attention to the existence of converging phenomena in the European social stage,

for example at the level of labour systems (Rodrigues, 2001), which leads us to the need for considering convergence in the field of education within a broader social process.

One could argue that there seems to be a center for broadcasting norms and standards concerning the institutionalization of national education systems somewhere, which has become the main reference point for any secondary education reforms in Europe, supplanting any national specificity and giving rise instead to a common social reality, the global society of the twenty-first century. This reference point is real and it is presented through multiple angles, from the technical and economic to the cultural and human, allowing in the end the overwhelming weight of globalization to stand out.

Globalization: a multidimensional process

The dominant view on globalization identifies it as a growing phenomenon of global interdependence of economies and markets, a space of conflict and increased competitiveness amidst the market economy, the effects of which spread across every social area. Globalization, in its origin and effects, is generally presented as a social inevitability these days, a corollary of the fall of the Berlin Wall and the Soviet Bloc, a result of two major revolutions with tremendous social impact – one related to information technology and the other to the financial markets –, a consequence of placing societies before a very efficient combination of pressure coming from expanding markets, technical innovation and organizational changes. A few authors also add factors like a galloping international competitiveness, massive unemployment and growing social inequality and exclusion to the equation. They all point out, however, to the vast global field of international structures and transnational entities, to the companies that operate on a global scale, to the consumers' growing appetite for "global products" as well as to the proliferation of systems of continuous, universal cultural communication.

The predominance of the economic and financial perspectives within the general discourse about globalization is obvious and the loss of national economic and political power in favor of transnational regulating institutions is also becoming increasingly irrefutable. The case of the Economic and Monetary Union, and the creation of the single currency and of the European Central Bank constitute a paradigm of what we have just stated. According to Giddens (1996, p.44), "modernity is inherently globalizing" and the industrial capitalism, as an economic order, has had a decisive and fundamental globalizing influence. The industrialism's ability to transform and broadcast globally communication technologies has definitely conditioned our "sense that we live in a 'single world'" (Giddens, 1996, p.54). New "dogmas" are formed around the economic approach: the unremitting global competitiveness, the new model for flexible production, the inexorable monetary concentration, the inescapable power of financial markets and the optimism that follows the emergence of new technologies. These are presented in such a strong, uncritical and consensual way that some authors dare to announce that we are witnessing the formation of "globalitarian regimes" (Ramonet, 1997) or the cultural reduction to a "single thought" (Morin & Nair, 1997).

The expansion of economic liberalism tends to stress, on one side, the homogenizer effect of global unification – in which there seems to be only one world and where everything is interdependent – and, on the other, it shows a very different effect related to the persistency of diversity and to the way it tends to

enclose its uniqueness within itself. The economic and financial globalization, which represents the engine of the whole process, is, however, only an element of a multidimensional process – cultural, political, social and strategic – of elaborating a complex and civilized unit (Morin & Nair, 1997).

According to Gimeno Sácristan, globalization is “a new metaphor for understanding today’s world and to see how it transforms itself” (2003, p.92), while Bauman, along with others (Giddens, 2000, for example), underlines the “indeterminate, unruly and self-propelled character of world affairs” (Bauman, 1998, p. 38) and concludes that globalization is “not what all of us, or at least the most gifted and enterprising of us, want or hope to do. It is rather what is happening to us all” (Bauman, 1998, p. 39). Nevertheless, the emphasis on the indeterminate and, in a way, uncontrollable character of globalization should not hide its effects on the redistribution of power and resources, that is, the “process of world-wide re-stratification, in the course of which a new world-wide socio-cultural hierarchy is put together” (Bauman, 1998, p. 43).

Indeed, as economies and economic areas interpenetrate and access the global market, the process is as anarchic (Giddens, 2000) as it is deeply unequal and the tendency is for the gap between developed and developing countries to remain the same or, in some cases, to increase.

Boaventura de Sousa Santos argues that the concept of globalization needs to be reformulated, because there “is not, strictly speaking, a sole entity called globalization; instead there are globalizations; for us to be precise, this term should only be used in the plural” (Santos, 2002, p. 62)³. According to this notion, the act of denouncing inequalities is at the heart of the issue, seeing that those have increased as a result of globalization processes (Santos, 2002).

The contemporary market economy presents itself as a complex system, which should not be understood as a simple collection of national economies nor as a completely globalized reality, because within it we find several international, transnational, multinational, continental, regional and local networks, linked to each other and hierarchically organized, and we can also witness different economic activities, with a dissimilar level of internationalization, intersecting. Globalization is not a “complete process”, that is, it meets several instances of resistance and innumerable restrictions at different stages, from the local to the international.

Furthermore, economic globalization is not a social process circumscribed to the period following the “thirty glorious years”; it should instead be analyzed as a movement that is part of a short cycle (the last thirty years) and also of a longer

³ *Vd.*, also, Santos, 2001, 2006; Dale and Robertson, 2004.

one (the evolution of capitalism in the nineteenth and twentieth centuries). In this sense, globalization is a phenomenon marked both by continuity and rupture with the past. The internationalization of economies has been taking place for a long time and the process has only intensified in the last decades. What distinguishes the process of globalization in the past decades is its acceleration, within which the surprising and continuous weakening of time and space constraints in planetary interconnections stands out. The “revolution” in communications, based on new technologies of information, has nourished an unexpected acceleration in the internationalization of several aspects of social life – including economic, technological, ideological, political and cultural relations – as well as a greater interdependence between apparently dispersed elements, as acknowledged by Stewart (1996), such as capital markets, multinational investments and ideological elements.

Thus, globalization can also be defined as “the intensification of world-wide social relations, which link distant localities in such a way that local happenings are shaped by events occurring many miles away and vice versa” (Giddens, 1996, p. 45), and also as the intensification of global relations of interaction in the field of social communication and as the transnational harmonization of social models and structures (Schriewer, 1995).

One could say that a new object emerges in local social contexts in almost every society: the world, the globe, the planetary scale or the global space, as Edgar Morin and Samir Nair call it (1997). In this process, building meaning – in individual and social terms – and understanding it are increasingly included in a dynamic process that operates within a permanent and interactive flux between the local and the global, where it is hard to tell the individual and the social apart.

Globalization as a social phenomenon includes a set of characteristics and standards of thought and action which influence, decisively and broadly, our way of thinking and acting, even at a local and individual level. There is even a certain appeal and a cultural attraction in regards to what is global. There is, as it always was, a human fascination with what is global and universal, which is understandable given the passing, unique and mortal nature of the human being. That is why humans are so open to embrace that which overwhelms them so completely, that which is so much larger and higher, that which appears in the world media to be so much brighter: global products, global discourses, any global utterance, all this attracts and inebriates as if it were a kind of extra source of life that inhabits a hungry – and often times filled with questions that find no answer, as Lipovetsky (1989) emphasizes – imagination. Moreover, this externalization is a mechanism that helps remove responsibility from the equation and, as we will see further on, it works as an act of vassalage regarding the established international

powers. This shows the growing difficulty in understanding politics as a service to each citizen, as a result of a careful articulation of the three dimensions of regulation: the global, the national and the sociocommunitarian. Globalization as an ideology, even in its toughest version of ultraliberal market, is also nourished by the transaction of this imaginary which, like common sense, has a powerful persuasive force that leaves aside and annihilates arguments, repeats slogans to exhaustion and continuously hides its multiple meanings. Scientific research has an important role to play: it must question and unveil these “natural” and interwoven processes.

Globalization must be considered, thus, as a process founded in time, irregular in its local displays and multifaceted, generator of new international (un)balances but also as a process that goes very much beyond a restrict economic dimension. Following the contribution of A. Little (1996), globalization standards can be divided into three main categories (Table 1). This categorization has the advantage of underlining the multidimensionality of globalization and the significant range of its effects. Among the most relevant, we would like to highlight three: the global becomes an important referent for analysis, debate and action; we witness a strong restructuring of the place and role of the nation-state; the ideology of globalization has a strong impact on the regional and the local, producing new tensions and social reconstructions.

Table 1	
Economic dimensions of globalization	<p>Immediate financial markets, decentralized and with less state involvement;</p> <p>Reduction of foreign direct investment to a minimum;</p> <p>The economic and productive relevance of a given place is determined by its physical and geographic advantages at an international level;</p> <p>Free exchange between localities, with specific fluxes;</p> <p>Increase in the free movement of labour;</p> <p>Flexibility of production locations.</p>
Political dimensions of globalization	<p>Increasing number of centers of power at the global, intermediate and local levels and loss of sovereignty by the nation-state;</p> <p>Analysis of local problems using the local community as referent;</p> <p>Predominance of powerful international organizations over national ones;</p>

	<p>Strengthening of common and global political values and deterioration of the nation-state's value;</p> <p>Relevance, at a national level, of matters related to the state and the social model.</p>
Cultural dimensions of globalization	<p>Deterritorialized religious mosaic;</p> <p>Widespread consumption of "global products" and global representations and simulations;</p> <p>Global online broadcasting of images and information;</p> <p>Growing "worldlization" of the ideology of modernization following the fall of the Berlin Wall and of the Soviet Empire;</p> <p>Growing multiculturalism everywhere in the world.</p>

Source: Adapted from Angela Little (1996, p. 428).

Seeking to focus this approach on the context of our reflection, we could say that globalization affects education on a national level and that national education has an effect on the process of globalization, as Stewart (1996) argues. It is commonly accepted that the development of education and training in each country has an effect on labour productivity throughout time and, subsequently, on the ability of different countries to cooperate and compete in international markets. Furthermore, national education and training systems evolve as a result of the impulse of economic cycles and in order to adjust to market forces, and these processes are growing less dependent from economic policies derived from national plans, as the European case – through the creation of the Economic and Monetary Union – shows. On the other hand, the level of educational development of the population of a given country has an equally important effect on the countries' ability to compete internationally, because it strongly conditions its aptitude to attract international technology and capital. In fact, the low cost of the workforce is not usually a factor in international competitiveness when the general level of education and training of a given country is not high. If this level was already a critical factor in terms of national development, it is now increasingly becoming a relevant factor in the context of a globalized economy, where space and time constraints are disappearing, in both developed and developing countries. The social process of globalization is now a part of local education systems and its evolution could hardly be understood if we were to focus only on the local and the national dimensions.

Adding to this, the multifaceted process of globalization, led by the most competitive companies, in a context of growing international competitiveness, also

includes an opposite anti-competitive side, thus contributing to emphasize the social dualization. So the process of globalization appears to be more dualizing than homogenizing. As António Teixeira Fernandes reminds us, those who cannot access the highly competitive labour market in a way that allows them to succeed “place themselves in a position of clear deficit in terms of meaning and social relations” (1998, p. 28).

According to this sociologist, the ideology of globalization, within which the ideology of competences mentioned above vivifies, “reinforces the meritocratic character of our societies and increases the appeal to individual mechanisms of social mobility” (Fernandes, 1998, p. 28). The most competent are those who get the best jobs, which not only widens the gap between those who are awarded high academic degrees and those who leave school – whether early on or at a later stage – but it also accentuates the level of competitiveness within the school system. The ideology of the “information society”, of “knowledge” and of “new competences” is not part of a neutral political discourse about education.

Indeed, in current societies, strongly marked by the access (of some, not all) to information, the gap between the active and culturally self-defined elites, on one hand, and the increasingly insecure social groups, deprived of information, resources and power, on the other, has been growing. We could also say that the “symbolic analysts” and the “generic workers” are growing apart. The latter are left with undifferentiated, routinary and repetitive jobs and the former get the dominant positions because they have access to the facts, codes, formulae and rules and/or because they know how to combine, opportunely and pertinently, the available sources of knowledge (Azevedo, 2000, 2001, 2005, 2006; Carneiro, 2001; Castells, 1997, 2004; Jarvis, 2000; Reich, 1993).

To this fragmentation, regarding access to qualifications and labour markets, we should add the progressive atomization of the understanding of social problems, as well as the increasingly important role that consumption plays as the primordial platform of social “participation” and creation of personal identities (as Bauman keeps stressing).

It would be pertinent to add another element to our analysis, in order for the notion of globalization to be as precise as possible, which has to do with the different degrees of intensity it can bear. It is in that sense that Boaventura de Sousa Santos suggests the distinction between “high-intensity globalization” and “low-intensity globalization”. The first are the rapid, intense and relatively single-caused processes of globalization. They usually happen, therefore, in contexts of significant inequality in regards to power (between countries, interests, actors or practices) and exchanges. The second are slower, more diffuse, more ambiguous

and more indeterminate and they tend to occur in contexts where the power differences are smaller (Santos, 2002).

Based on this characterization and in the fact that education policies must (for now) be mediated by national states, it does not appear to be right to assume that education is a case of low-intensity globalization, much less a “paradigmatic” one (Teodoro, 2003, p. 61)⁴. Arguing in favor of this implies considering that in the field of education exchanges (again: between countries, interests, actors or practices) and power relationships are not unequal, that they are not even marked by the position that countries occupy in the global system; that education resists singularly to the impact of globalization, in such a way that “the effect on this field [does not appear to be] as direct and as deep as in other sectors” (Afonso, 2001, p. 41). It also implies arguing, *avant la letter*, in favor of fixing an agenda or global goals for education, to the detriment of explicit mandates. So, how do we explain that, as António Teodoro also points out, Third World countries suffer from an indelible “institutionalization of international influence” (Samoff, 2003)? Unlike what happens in central countries where people are, in fact, more prone to manage agendas than to complete mandates.

It is important to keep in mind that, as affirmed by João Barroso, “‘transnational regulation’ comes oftentimes from central countries and is a part of the system of dependencies within which the peripheral [or semi-peripheral] countries find themselves, namely in the context of different constraints of political, economic, [geostrategic], etc., nature that integrate the so-called ‘effects of globalization’” (2006, p. 45).

We do not believe, therefore, in the hypothetical “immunity” of education to the influence of globalizations, because, and this is a recent example, we have been witnessing the “vertiginous expansion and acceleration” (Antunes, 2005b, p.9) of the implementation of the Bologna Process, characterized by the “imposition” of a precise progress and by the “coercible transfer of several ideas” (Pacheco & Vieira, 2006, p. 122) and normative procedures. We do not think that these and other examples allow for the argument that education is an instance of low-intensity globalization. In fact, if some educational phenomena are slow, diffuse and ambiguous, others erupt fast, in a clear statement of the predominance of the global over the local. We would do well to remember furthermore that the global “is always the successful globalization of a particular localism. In other words, there is no global circumstance for which we cannot find a local origin, either real or imagined, a specific cultural insertion” (Santos, 2002, p. 69).

⁴ See also Afonso (2001) e Barroso (2003).

Bearing in mind this main element of contemporaneity and given the importance attributed to a certain international ideological consensus around the basis and formulation of national education reforms, it becomes necessary to question in more detail, in light of the input from social sciences, the transnational interdependency in the field of education.

Education, a global institution

Anyone interested in the issues surrounding school education will notice not only the differences but also the similarities between the education systems of different countries in Europe and throughout the world (it is enough to mention preschool, primary and university education transnational models). Their main features are almost similar anywhere in the world. As Hüfner et al. suggest, education is a worldwide institution (1992). Beyond the clear evidence, several international studies have concluded that there is an effective tendency among nations and national education systems to converge into common structures and practices. According to Inkeles and Sirowy (1983), this tendency is vast and deep. Despite the diversity of cultures and societies, researchers are able to travel around the world to study a given degree or level of education because, as Hüfner et al. remind us, there is a “decrease in human complexity, based on rationalist scientific ideas” (1992, p. 367). In the last two centuries, we have developed an internationally relevant model for the modern school, a subsystem adopted by very country in a process of modernization, a transnational and universally applicable model (Hüfner et al., 1992). The emergence of these systems can be inscribed in a long-term historical dynamic.

The concept of *longue durée*, presented by F. Braudel in a famous 1958 article, in the tradition of the pioneers of the Annales School, established the event, concerning moments of short duration, the “most deceiving of durations”, as the opposite of the long-term model, involving decades and centuries, home of inertia, resistance and “long-term prisons”. The latter was the time of history, the only one capable of grasping the almost timeless quality of human mentalities and behavior and their myths. As M. Vovelle (1978) suggests, political history abandons the thread of events in order to understand the social problems which can only be conceived of in duration, namely the issue of the state.

The economic history broke new ground when it escaped the prison of the short duration of the event and proposed a three level modulation: the short-time of crisis, the medium-term duration of intermediate cycles and the long-term periods of “long duration”. In the context of social history, this model appeared to be of little use for not being able to account for the multiplicity of times that come into contact and interweave in historical time, which constituted an appeal to the rediscovery of the event in another relationship between short and long-term times, in what P. Vilar calls “the moderately long time”.

The modern system of school education, developed for the last 200 years, starting in Europe, is an historical system associated to long-term duration which

results from the intersection of several historical, economic, political, social and cultural times that cannot be isolated. If, as we have argued, economic development has become a propagation factor for this model, the social and political evolution of mentalities has been an important factor in its slow and continuous implementation all over the world.

Inkeles and Sirowy (1983) support their analysis of the convergence and divergence tendency among education systems with the observation of the patterns of change in several dimensions, which has led them to conclude that change is at times slow and at times fast, that it sometimes converges and other times diverges, reminding us of Braudel's expression about "symphonic" history, in which different rhythms of change meet in a converging whole or in a manifestation of divergence.

The world-systems theory

A few authors employ the world-systems theory in an attempt to explain the processes of homogenization we have mentioned. The structures and practices, common to several school education systems throughout the world, are a part of the modern global system and they basically follow a transnational, modern and global model of education (Adick, 1993; Hüfner et al., 1992). Social sciences have identified and examined world-systems as a unit for analysis: it includes more than any society organized by the state, it takes into account a historical dynamic and the systems' own logic, which does not derive from its components.

The world-systems that we are referring to, in the wake of Wallerstein's economic studies, is a historical subsystem that has been developed around both the expansion of a transnational production system – the capitalist global market – and the expansion of the social and political model of the nation-state. This evolution carries within global cultural models, among which we highlight the modern system of school education. This system has the strength of the planetary space and the weight of long-term duration, which, at least apparently, is enough to gradually mitigate potential divergences or attempts to affirm alternative educational routes.

Thus we can only understand each modern education system in light of the “modern world system”. Every modern society has adopted subsystems of education with similar features. There is a secular tendency, historically prolonged, towards developing national school systems with common structural characteristics (Adick, 1993).

According to this author, the expansion of education in Third World countries is connected to the general hope of overcoming development challenges, by means of the investment in alphabetization and education. By doing so, each country has gone through a process of local adaptation to a new situation with transnational characteristics. This adaptation was part of the evolution of systems, from pre-modern to modern education systems. What is new about global modern education is not the adoption of a formal system, but the “new quality of education, as a part of a national development project in a new global context” (Adick, 1993, p. 409).

Christel Adick, following the Stanford team – Boli, Meyer and Ramirez –, underlines that what education is (its ontology), the way it organizes itself (its structure) and that for which it is worth (its legitimacy) are qualities that evolve primarily at the level of global culture and economy (Adick, 1993). The modern school follows a global model, internationally valid for education systems

organized by nation-states. The modern transnational model of education – which opposes any kind of pre-modern education – has expanded all over the world and has led to the creation of similar, unified and systematized national education systems.

John Boli and Francisco O. Ramirez, of Stanford University, have studied the propagation of the model of institutionalization of education. The structural features of this model are:

- a general administrative organization funded and controlled by the state;
- a school system internally differentiated according to consecutive levels, courses and the corresponding final exams;
- the organization of the classroom teaching and learning process, according to different age groups and unvarying time units;
- governmental or public regulation of those processes, through programme requisites, guidelines and evidence from exams;
- the creation of different roles for teachers and students and the professionalization of teachers and teaching methods;
- the use of certificates, diplomas and credentials to establish a connection between the school and the professional careers, associating school selection with social stratification (Schriewer, 1995).

To these we might add the subjectification of knowledge, the atomization of academic times and spaces and the distribution of students in classes.

These education systems are globally relevant for three reasons: because they are a component of the modern global system and a subsystem of every country that is in a process of modernization; because their main features and social functions are relatively unspecific from the cultural point of view and are also the same everywhere; and because this model of the modern school is globally applicable, is and will always be of long-term duration (Adick, 1993).

National and historically situated efforts of economic and social development are themselves processes of inscription in heavier trends within societies and global economies. In the same way, changes taking place in education systems of developing countries are processes of inscription in a modern and global society. Thus, national processes of education reform are, in general, processes of approximation, and not dissociation, to the characteristics and potential of the “education institution of the global society”. According to this perspective, the disparities that we find in education systems, their impasses or important conflicts, are not so much local and partial phenomena as they are elements of a hierarchical “world’s education system”. These processes are contentious and they are usually

translated into the supremacy of a “universal” model of education: general school systems, selective, standardized, professionalized, controlled by the state and hierarchically organized into levels, diplomas and certificates.

The already mentioned structuring features of the modern school spread all over the world; a “world education discourse” is created and it influences the social units which operate at a lower level – state, companies, political parties, parent-teacher associations, reform committees, social groups – binding them ideologically in such a way that they are unable to act independently. Besides, the global relevance of this discourse adduces local evidence to the performance of these social agents.

The introduction, grip and expansion of the global political culture, which favored the emergence of the nation-state and which also led to mass education, cannot be considered as a historical inevitability; it should be seen as a wave of cultural restructuring of the West that, for decades during the nineteenth and twentieth centuries, has rearranged public life. In this process, the slow but continuous adoption, by every nation and by imposition or copying, of the “principles of the territorial nation-state and individual citizenship” has played the main role (Ramirez & Ventresca, 1992, p. 50). The national systems of school education were in charge of the special social mission of conveying these same principles, consecrating a dominant model of modernity. Let us explain, before moving on, in what framework we will consider this process of tension and conflict, of imposition and resistance, of imitation and autonomy.

Convergence and divergence

According to Halls (1990), the theory of convergence is a premise of Comparative Education and it constitutes one of its specificities, since it belongs exclusively⁵ to it. According to this theory, applied to the international education relations, the larger the number of international connections between countries, the better the prospects for cooperation and abandonment of cultural autonomy. The bilateral and multilateral cooperation agreements, European Union treaties and the agreements for the mutual recognition of diplomas are a few examples that illustrate the convergence of interests and its contribution to a growing harmonization between different education systems. The examples are, indeed, numerous and the evidence appears to be convincing.

The institutionalists John Meyer and David Kamens used to say that dreams with national roots are more homogenous in celebrating economic modernization than in valuing specific cultural and political traditions (1992). These authors also highlight the fact that the modern educational model – which is extremely important as an instrument of individual and social progress – is adopted in places where progress is taking place and it will be adopted wherever progress is a significant or crucial goal, which nowadays means everywhere in the world.

The modern conception of “society” as a thread ball of interdependent individual actions is to a great extent based on the disposition and ability of individuals and on the idea that improving them will lead to social development. This ideology has decisively contributed to a rational educational programming, increasingly promoted by the state, in which human development is assisted by a rational system that improves the personal, social and productive performance of individuals. That is why mass education is a part of the basic model of modernity, as Meyer argues (1992a).

The expansion of school education is becoming a social investment of extreme importance all over the world, based on a series of causal associations which, more that supported by any real evidence, are hypothetical. Among these we find: educated adults generate more social development; educated children and youngsters are healthier and their risk of disease, road accidents and teenage pregnancy is lower; the expansion of mass education has led to a decrease in social inequality; selective school systems are considered to be unequal and “comprehensive” systems are understood to be more democratic; there can be no economic development without educated human resources; productivity at work

⁵ The exclusivity does not belong to Comparative Education alone; it is part of every area of knowledge based largely on comparative and international studies.

is proportional to the level of qualification of human resources; applying “new technologies” in companies requires them to employ a highly qualified workforce.

Finding evidence to back up these kinds of causal associations has not, in general, been an easy task. However, as developed countries (in the center) adopt certain converging policies, they create a powerful homogenization factor. Even if we cannot find the evidence to support those associations, at an international level, concerning the impact of education on personal and social development and on equality of opportunities, on productivity and on the levels of social participation, it is difficult to deny them socially and politically, at a national level, because the advantages of copying the models of developed countries with a higher average income abound.

However, and without denying the existence of this convergence, Inkeles and Sirowy (1983) and Scott and Kelleher (1996) alert, pertinently, to the need for exploring this concept further. According to them, the fact that there is a common movement towards a same point does not mean, *ipso facto*, that there is convergence among countries. They believe that the existence of similarities in national education systems says very little about the convergence between them, about the process of moving from different positions towards a same common point, as if there were very small variations around the main tendency.

Now, the notion of convergence, predominantly supported by empirical evidence, explains how we move from diversity to similitude, both from an institutional point of view and from the point of view of values and attitudes. Analyses done under the protection of this theoretical perspective spread from the more or less converging elements of social organizations to the factors that facilitate converging motions and to the mediation of the patterns of convergence.

But the analysis, carried out by those first researchers, of the patterns of change concerning a set of education dimensions – nature and ambitions, organizing structure, demography, management and finances, as well as interpersonal and institutional dynamics –, has allowed them to conclude that every nation is moving towards new patterns and that, at the same time, they remain dispersed around a new norm in the exact same way they did concerning the previous one. They also witnessed motions in which the systems, as time goes by, diverge more than converge.

Roger Dale (1999) emphasizes that globalization is not a homogenous process and neither are its effects. He suggests, beyond “imitation” and mutual “learning” – which he believes to be traditional mechanisms of external influence –, a categorization of five mechanisms with external effects on education policies as part of the “effect of globalization”: “harmonization” (taking place within the

European Union, as we will examine later); “dissemination” (of priority agendas, as those coming from the OECD’s CERI – Centre for Educational Research and Innovation); “standardization” (for example, norms concerning scientific criteria or human rights); “installation of interdependencies” (adding common curricular subjects like ecology and peace to the curriculums) and “imposition” (by international donors and financing organisms such as the World Bank). He concludes that the effects of globalization on each country’s education are largely indirect and that they are the result of adaptations imposed by nation-states as a response to globalization and not so much a direct effect of it (Dale, 1999). Distancing himself from the institutionalists at Stanford, Dale believes that the existence of a “global institutionalism” has not been proved; it still lacks actual and verifiable results in individual states (Dale, 2007, p. 111). But if it is true that there is still lot of research to be done on transnational effects, beyond former categories, and on national and social and community education policies, it is also true that the effects of globalization on education policies, whether they are examined from the global to the national and local contexts, or vice-versa, are growing ever more present.

Thus, we witness two opposing forces at work. Convergence is favored, in the field of education, beyond imitation and mutual learning (even if in a “soft”⁶ version), by pressure from other elements within the social system, namely the development of the market economy and its overwhelming weight upon the world and also the significant diffusing power of the international elite’s “opinion” – political leaders, experts, international agencies and technical consultants, the ones that inhabit the globe, as Bauman puts it (1998, p. 45). Divergence, on the other hand, is fed by the differences in economic development (an unequal position in the capitalist economy) and in political systems (it is the case of Spain and Portugal, in Europe, which have suffered for a long time the social and political effects of dictatorships), as well as by the persistency of values and historical traditions with a coherent and formal social expression, by the different social and historical dynamics that mark each society, by conflicts of interests and by the disparity when it comes to available resources meant for education, to which we would add the usual “gap between political discourse and practice” (Schriewer, 2000, p. 72).

Nevertheless, neither the notion of convergence nor the notion of divergence is sufficient to explain a fundamental issue of current European social reality, which Scott and Kelleher (1996) have identified as such: using different solutions, the national education systems of Europe are following certain paths in order to

⁶ Several international congresses and seminars on education, which take place every week, despite not being organized with the intention of establishing conclusions and dictating norms, end up “dictating” more “implicit” material than one might think after a superficial analysis.

respond to a common set of pressures and problems. In three important channels, through which the convergence among different education systems can flow – such as (i) political pressure within the European Union and its influence on national reforms, (ii) the ensuing real changes in national education and training policies and (iii) the real adaptations taking place within different structures of national education systems – we witness simultaneous motions of convergence and divergence, which evolve from a greater convergence towards a greater divergence, as we analyze the three types of channels following the order in which they were presented. It is therefore necessary to formulate a more general theory to explain what these two are unable to cover.

Jürgen Schriewer, in line with the theory of “societal cohesion”, suggests opportunely the use of the concept of national or local reinterpretation. Despite highlighting the significant degree of global standardization that has been reached in organizing structures, political models and reformist discourses, Schriewer has recently proposed a more careful reading of the national reinterpretation of the global education system “guidelines”. According to him, several comparative studies allow us to affirm that there is also a significant intranational interdependence among specific national standards. These independencies develop as “interconnection networks, which, while remaining consistent at an *intra-national* level, vary significantly when examined at an *inter-national* level” (Schriewer, 1995, p. 19 [our italics]). Here is an example of these interdependencies between specific national standards: those that operate somewhere between the industrial labour organization or the structure of workforce qualifications and mobility and career progression. Moreover, Schriewer focuses specifically on research related to the interconnections between the technical and vocational education systems, the structure of workforce qualifications and the organization of labour, in order to point out that the technical and vocational education and the use of human labour “are defined, even within industrialized and technically advanced societies, largely by [national] social and cultural factors” (Schriewer, 1995, p. 17).

We could mention, in particular, the structures of qualifications, which are for the most part social and local constructions, and the way they are used by employers. Firstly, the way in which they are defined is profoundly affected at least by three factors: the beliefs of different types of employers regarding the efficiency of different ways of organizing labour; the organizations that represent the workers’ ability to influence the production of qualifications and the characteristics of national education systems, which are also influenced by their governments’ policies. Secondly, the way these structures are used is dependent on several factors, namely the type of labour organization, according to which the organic structure of companies differs greatly and where different roles are given

to equally defined professional categories. The case most often mentioned in Western European literature is the comparison between industrial companies in France and Germany, established using companies operating in the same branch of activity, with roughly the same size, the same kind of production, technology and subject to the same level of global competitiveness in the same markets. They structure their workforce and they organize themselves “according to distinctive national standards of company organization and division of labour” (Schriewer, 1995, p. 19). We are, in fact, standing before nationally divergent business cultures and ways of structuring the internal labour market. The national systems of education and training operate, in this context, as subsystems, “largely autonomous, building their own social environment and inducing other subsystems to adapt” (Schriewer, 1995, p. 18). This is what happens both in the case of the dual vocational training system in Germany and in the case of vocational training in schools in France.

After studying the same countries, Maurice, Sellier and Silvestre (1982) had already identified the importance of the different “spaces of qualification” as games of interdependencies between processes of socialization, organization and regulation, which contribute to shape in a different way the roles and actions of social actors. Maurice (1989) and the group of sociologists from Aix-en-Provence had employed the concept of “societal coherence” (later recovered by several authors, including Plantier, 1990) in an attempt to establish criteria for international comparisons, namely in the field of education and training. Also, Michael Piore and Charles Sabel (1989), when analyzing the way the US, Germany, France and Japan reacted, economically, in the aftermath of the Second World War, realized that these countries had evolved in technological and productive terms in the same direction, but they had not converged at least in one domain: the way in which they organize labour. These different ways were dictated, the authors argued, by former commitments, which varied according to the different war experiences, inflation and threats of economic crisis.

Boaventura de Sousa Santos also mentioned, in 1985, that “the inclusion of a given society in a transnational category should allow for the specificity of each society’s historical process. Even considering the weight of the globalizing impact of the world-systems logic, different societies evolve according to different historical processes, following different rhythms and directions” (1985, p. 873). He adds that this global logic feeds on those differences, found in different segments of the systems. We believe that in context of this analysis it is important to argue that the evolution – rhythms, directions – of these localized differences also feeds on the same global logic.

We all agree that different societies, when looked at through the same time period, can present solutions or characteristics only seemingly identical, while maintaining “distinct sociological meanings”, as Boaventura de Sousa Santos observed (1985, p. 873). In this case, different education reforms which occur in the European social space, during the same time period, affecting similar educational and training levels, necessarily show, under an apparent similitude, historically sustained differences. Nevertheless, at the same time, these similitude and simultaneity also suggest a construction taking place according to the rhythm and direction of transnational education models. Clear examples of this have been the Labor Programme, on the future concrete goals concerning education and training – to be reached by European Union countries by 2010, it was established in 2000 by the European Council as part of the “Lisbon Strategy” –, and the matrix, defined at the same time, of the “knowledge-based economy”.

Two other areas of study to which we can apply the same reading are the one that examines the relationship between education, modernization and development and the one that argues for the global prevalence of the post-Fordist model. Regarding the first kind, we could say that despite the reigning linearism, these relationships are not mechanical: on the contrary, they are extremely problematic. These studies view education as being at the same time determined and determining within societies (Fägerlind & Saha, 1985, quoted by Schriewer, 1995). An institution of modernization, such as the “modern school”, does not linearly drag – as suggested both by those who support a universal rationality linked to industrialism and by those who support any kind of functionalism – modern values, modern behaviors or economic development. As Schriewer underlines, there are no universal determinants; historical processes are “too numerous, too complex and, in fact, too independent from each other” (Badie & Hermet, 1990, quoted by Schriewer, 1995, p. 20), which strongly calls into question all theories of universal value, be it the one about modernization, the one about dependence, the one about structural functionalism or the one about Marxism (Schriewer, 1995). The second, the post-Fordist production model, is characterized, *grosso modo*, by flexibility and the demand for a highly qualified workforce in possession of a vast range of “new skills”. However, the theory about its global implantation, resulting of a general and abstract consensus, capable of mobilizing political action at the national level, is met with several problems, even in the European stage and in its most developed countries, where a local system of Taylorist (even archaic) production prevails, sometimes completely out of touch with the dominant ideology. Yet these problems are increasingly being functionally included in a globalized market economy. Portugal, for example, as we showed with the study on the social and professional integration of youngsters, continues to report production problems regarding the inclusion of an unqualified workforce, both at the school and professional levels, which are considered as

secondary labor markets within the dominant world order (Azevedo & Fonseca, 2007). These researches in the social and educational fields have shed light on the contrast between the diffusion and global adoption of transnational standardized education models and the persistence of several networks of national and local sociocultural interconnections. The case of the expansion of the European University model is, perhaps, the most convincing. It was developed throughout the world, without alternatives. However, as it grows and develops, it also diverges nationally, instead of, simply and increasingly, converging. Such a phenomenon lies, argues Schriewer, in the “reinterpretation and adaptation procedures promoted by receiving cultural and national groups” (1995, p. 20). In every new environment, as higher education institutions lose their strong elitist quality, the models conveyed between cultures are selected, reinterpreted and re-elaborated according to prevalent local interests and specific needs, following differentiated “culture lines” (1995, p.23) and “adaptation logics” (1995, p. 24).

Roger Dale (1999, but also Dale & Robertson, 2002) has also joined this societal coherence perspective, stating that globalization represents a new set of rules, which are nevertheless interpreted differently by different countries. Dale and Robertson argue that, despite globalization, national differences have been preserved and they refuse the idea of “convergence among countries” (2002, p. 12). They believe that international organizations contribute to the strengthening and reinforcement of a discursive and processual global agenda but that they also do very little to hinder divergence when it comes to implementing that same agenda (Dale & Robertson, 2002). António Nóvoa states that it is “obvious that no ‘homogenization’ will take place. To talk about the diversity of national education systems is almost a tautology and that will not eliminate tendencies aiming at defining common goals, similar strategies and, subsequently, identical policies” (2002, p. 133).

At this stage it seems important to bring to the fore the concept of glocalization, introduced by Roland Robertson (1992), as it tries to show how completing and interpenetrative homogenization and heterogenization tendencies are (Bauman, 1998; Giulianotti & Robertson, 2006; Luke, 2002; Nóvoa, 2005).

According to Green (2002, quoted by Webb, Vulliamy, Sarja & Hämäläinen, 2006), cultural homogenization has not been taking place other than at a superficial level. Steiner-Khamsi (2002), on the other hand, suggests that convergence is convenience, and that it is circumscribed, more often than not, to political rhetoric and it serves political opportunity and manipulation. This is because “externalization works as a last resource of authority and it tends to be activated only when self-referentiality is at a loss for arguments. In many cases, self-referentiality prevails and internal references are enough” (2002, p. 70).

For John W. Meyer (2000), however, homogenization sticks to the main dimensions involved in the phenomenon of globalization, whereas the legitimacy of heterogeneity, unicity and identity is restricted to that which “does not matter” (Meyer, 2000, p. 245). That is why he believes that “nations celebrate their unique heritages while moving towards standardized models” (2000, p. 245).

Pan (2006) advocates that the division between convergent and divergent tendencies is not established according to the importance of the dimensions but according to the fact that the pursuit of common political goals knows particular local practices. For this author, glocalization does not mean “thinking globally and acting locally”, it means “thinking and acting both globally and locally” (Pan, 2006, p. 245). It constitutes, therefore, a way to “understand the complex interrelations between transnational, national and local factors which shape the translation of global imperatives into local realities” (Pan, 2006, p. 245).

At any rate, the local may be (and is) confined by the walls of the classroom, by the school walls, by the limits of vertical groupings of schools, of the village, town or city, by the regional, national or even set of nation-state borders. And what about the global? We could define it in opposition to the local, which would mean that a given socio-geographic context could be understood both as local and as global. Let us take the European Union as an example. When compared to all the other global subsystems it can represent a local context. When the observer backs away from a global perspective and lands in a school, a decision agreed upon by all EU member states takes on a global quality. It is as if the local gained ground on the global while the global gained ground on the local in an increasingly small arena. According to Giddens, the “local and the global [...] become inextricably intertwined” (1996, p. 76). Urry (2000) corroborates this idea, stating that globalization intensifies localization and localization intensifies globalization, in an endless cycle.

We will keep in mind, in the context of this essay, the inherent complexity of the development of national education systems, as we consider them to be an important part of the construction of modernity. We notice, on one hand, the pertinence of the theory of the world-systems, as it values the action of transnational education models as global cultural models, internationally valid, conveyors and conveyed not only by the global transnational production system and the capitalist economy but also by the expansion of the sociopolitical model of the nation-state and by a multiplicity of pressures which we will look at in detail later. On the other hand, we register the important observation on the limits of a linear and deterministic universalism, as we witness the persistency of strong “societal coherences” that configure, in the national-local space, significant divergences in the midst of the verified convergence and which are the result of a

labor of national-local reinterpretation promoted both by political decision-makers and by the social actors. Convergence and divergence are, therefore, simultaneous social dynamics, more or less conflicting.

Retrieving the words of a UNESCO report (1980), we could say that there are many voices and a single world – given the plurality and multiplicity of voices that we find in the world (which is far from homogenization, despite the points of convergence) –, as well as that there are few voices and a lot of worlds (Traber & Nordenstreng, 1992), given the hegemonic intensity and reverberating projection of the few voices that are able to travel the globe – while others vanish in the air not far from where they were uttered. Some, as Zygmunt Bauman puts it, are chained to the place, others inhabit the globe, masters of freedom (1998).

Building transnational educational models and how they operate

It is important for this text's economy that we clarify and question the concept of the "world's education system", which we will do by appealing to some contributions from systemic approaches to social systems.

In order to define system, we will adopt a broad perspective that characterizes it as a set of dimensions or variables which possess autonomy and at the same time interact, connecting to each other by a set of relationships. Other perspectives – which understand it as an entirety organized by solidary elements that can only be defined in relation to one other – are more difficult to apply to the analysis of interrelations present in the world's education system.

A system, particularly a social one, can be defined around four main pillars and can be described according to two main perspectives, a structural one and a functional one.

The pillars are: the interaction between the dimensions that the systems is comprised of; globality, seeing that the whole cannot be reduced to its parts and that we can only understand these, as a whole or in part, when they are part of a whole; organization, which includes the processes through which the variables come together and are combined, ordered and optimized; and complexity, as there are always multiple combinations between the elements and seeing that uncertainty hovers over the ways in which they are established at any given moment.

The world's education system, as a transnational sociocultural model which spreads, copies and imposes itself throughout the world, embraces a set of dimensions we will, provisionally, try to identify by placing them in the context of the following seven: the expansion of mass education in the nation-state; the expansion of the ideology of modernization and progress; the externalization of the national education systems; economic, cultural and political globalization; the system of scientific communication; the action of international organization; comparative and international education.

Before we describe them, it is important that we mention that this system should include, from a structural angle, a certain circumscribed territory or border, a set of well identified and analyzed dimensions, a network of intercommunications and facilities for storage and nourishment of the system. From a functional angle, the system can be analyzed from the perspective of the different fluxes that circulate in the connecting networks, from the prism of the decisions centers and flux regulation, from the standpoint of retroaction modalities

that constantly provide for the decision, and it can even be analyzed regarding intercommunication and decision times.

The world's education system is an open system in which these dimensions interact and that should be considered as a pertinent unit of analysis of local and national educational phenomena. We shall begin by looking at each and every one of these dimensions and at some of their interactions so that afterwards we can examine them following a global approach.

1. The consolidation of the nation-state and the expansion of mass education

We can begin with a now familiar basic fact: the world has witnessed the development of school education systems which share a similar mould. Most of them are controlled by national states, are declared mandatory and follow a modern transnational model of education, which has slowly, for decades now, been covering every pre-modern or non-formalized form of education.

For some time, people stood behind theories which suggested that the responsibility for the growth of modern school education models laid almost solely on growing industrialism. Education was an instrument for preparing and training the workforce necessary to the development of the capitalist way of production. On the one hand, there was the need to secure the social and professional integration of every individual; on the other, the need to make sure that those individuals specialized in areas for which there was a demand according to the new division of labour, following the demands of the industrial society.

According to this perspective, mass education emerged alongside the industrial society and it now expands throughout the world alongside market economy. However, several economic studies have questioned this linear and one-dimensional connection. On the one hand, as the historian Eric Hobsbawm (1996) put it, English industrialization did not rest on a hypothetical systematic recourse to new skills, namely technical and vocational, nor did other countries, where industrialization arrived later, stand by waiting for the capitalist way of production to boom in order to develop modern school systems with enormous social impact, as was the case in Sweden, examined by Boli (1992).

Theories inspired by Marxism have in the meantime mobilized another theoretical instrumental: the contribution of modern school for the reproduction of social relationships of production at the heart of the capitalist economy. These points of view remained prisoners of a functionalist approach to education and economy, making little not only of numerous maladjustments between the two

fields, but also of the multifunctional quality of school education, of the diversity of demand behaviors and the relative autonomy of its social action.

The institutional theory, developed by J. Meyer and F. Ramirez, would bring a more consistent proposal for the analysis of the expansion of mass education in light of the more global processes of expansion and consolidation of the nation-state. The political, economic, religious and cultural changes, in which "legitimizing myths" assume a relevant role, are the ones which are part of and explain the construction of a modern education institution. By evolving from pre-modern to modern forms of social organization, all societies adopt the modern model of education systems.

The institutionalist theory has mostly been developing around the analysis of the mass schooling process. Mass schooling is a global phenomenon, not only in terms of its reach, but also because it is highly institutionalized worldwide (Ramirez & Ventresca, 1992). It has a global status as a highly legitimate entity, not only because of the benefits it confers to individuals and national societies, but also for its role in forming a global society, in which school for all will result in universal understanding and world peace (Ramirez & Ventresca, 1992).

Several global trends concerning the organizational development of mass schooling systems illustrate the pertinence of the institutionalist approach. The same authors grant particular attention to three of these trends: the increase of enrollment in primary school, the creation of legal mandates regarding mandatory schooling and the establishment of a centralized authority to deal with educational policy, the Ministries of Education. They examined, concerning the first case, the years between 1870 and 1980 and concerning the other two the period between 1810 and 1990. The authors found, from the mid-nineteenth century onwards, surprisingly similar regional tendencies, resulting in expanded mass schooling systems, declared mandatory and subjected to the state's national jurisdiction (Ramirez & Ventresca, 1992).

Sweden's national adhesion to mass schooling case is analyzed by Boli (1992). According to him, mass schooling is an inevitability of modernity, that has emerged in different Euro-American countries "because it appeared in Western civilization as a logical and even necessary consequence" (Boli, 1992, p. 73) in a whole civilizational complex.

Citizenship is a fundamental vector in the origins of mass schooling. The nature and content of childhood socialization are intimately connected to the nature of citizenship rules that unite members of society to their broader community. The individual has, in turn, become the basic unit of society, a citizen capable of participating fully in the community, which is itself rationally tutored by the state.

The state has been replacing the churches as dominant structures of authority and the national community has become secularized, reconceptualizing itself as a unified social project, oriented towards progress and collective success through the individual actions of “competent and loyal” citizens (Boli, 1992, p. 69). Building these types of citizens implied removing them from their traditional socialization centers and training them in the midst of a new formal structure: distinct and disciplined.

The general afflux of Swedish citizens to a State-driven socialization, away from their homes – mass schooling – happened because “they were all inspired by the same institutional imperative” (Boli, 1992, p. 72). A highly idealized notion of a pious, productive and disciplined citizen accompanied the view that only a formal socialization process could convert these “little brute beasts” into the “right” type of participant in the national community (Boli, 1992, p. 72). A general faith in schooling pushed every sector of society towards mass schooling (Boli, 1992). Despite not having any evidence that basic mass schooling produced better citizens than the home, the churches or the work place, everyone assumed that schooling could and should do it.

It is in this sense that Hüfner et al. (1992) talk about modern school education as a “scientific construction”, which does not emerge in articulation with society's primordial traditions, it surfaces instead as a “general technology” programmed to reach success. Seeing that this has openly and globally turned into a “fundamental and legitimized” goal, basic mass schooling has become a “worldwide technology”, not to be mistaken anywhere in the world for a “local national institution” (1992, pp. 347-348).

As Boli made clear concerning Sweden, the global movement towards the construction of modern nation-states was to a great extent supported by the worldwide establishment of mass schooling. The adherence to the modern state, that is, to new models of organization of sovereignty, and to the modern nation, that is, to an organization of society based on the individual citizen as the main social unit, implied the adherence to the normative principle and organizational reality of mass schooling (Meyer, Ramirez & Soysal, 1992).

The nation-state, according to these authors, can be considered to be “a transnational cultural model”, at the heart of which mass schooling has become an important mechanism to develop social activities, through which individuals and states establish reciprocal symbolic relationships.

Thus, the institutionalized model of schooling has been disseminated as an ideology intrinsic to European modernity. Educational goals have been reflecting guiding principles of this global modernity – such as the development of individual

personality, of citizenship and of skills of social participation; the equalization of social and political opportunities; national economic development and a political order guaranteed by the nation-state – since the nineteenth century (Schriewer, 1995). In other words, and drawing on information technology vocabulary, the software of mass schooling has expanded thanks to the potential associated with its application to the hardware of the modern sovereignty form, the nation-state, and the latter has developed, to some extent, thanks to the potential of mass schooling.

In fact, the global mass schooling institution has developed and has established itself as a “cultural model”, with an increasingly familiar set of ideological principles and organizing measures. This model is bind to the ascending principle of the nation-state and the connection between mass schooling and nation-state has become an axiom (Schriewer, 1995).

In this process, the institutional perspective stresses the ideological and organizing isomorphism's surprising influence. DiMaggio and Powell (1983) highlight three sources of this isomorphism: coercion, imitation and adhesion to normative and/or cognitive criteria. In the explanatory universe of isomorphic processes, they emphasize normative processes, asserting the appearance of a global culture which has favored the form of state and national organization of collective action and social structure and which has led to mass schooling has a means to educate members of a national society (DiMaggio and Powell, 1983).

The growing national adhesion to the global models of mass schooling has also produced this overwhelming isomorphic effect. Despite the differences, explicit and present in many specific characteristics of national society, mass schooling is now globally institutionalized.

At the curricular level, Meyer also examines the “surprising homogeneity” that exists around the world (Meyer, 1992b). Again, the analysis deals with mass schooling at primary level education. The evolution of the curriculum, he argues, is a global process, not so much a national one. It is a fact that national curricula, prescribed by the states, reflect local and national interests and particular needs, but Meyer adds that they also reflect global forces. He goes on to argue that local interests and needs, by taking mass schooling forward and by defining it, tend to be filtered by cultural forces spread throughout the world. This explains why we frequently find more homogeneity and standardization among the curricula prescribed by nation-states than expected (Meyer, 1992b).

As several countries moved towards the modern global policy of nation-states, they were able to develop mass education systems, regardless of local social conditions (Meyer at al., 1992). These authors, following Wallerstein, analyzed the

global expansion of mass schooling and they divided countries, according to their proximity to that model, into famous categories: core, periphery and semiperiphery. The conclusion is as follows: the level of adhesion to the world's system of mass education is structurally affected by a country's place in the global society.

The analysis of the process of building the nation-state and expanding mass schooling in over 100 countries, since the mid-nineteenth century, allowed us to observe that the increase in school attendance was around 5% per decade, until 1940. After the Second World War the growth rate went up to about 12% per decade.

This can be explained by two main causes: on the one hand, international political pressure towards setting up the model of the nation-state everywhere; on the other hand, the legitimacy of the close connection between the model of the nation-state and mass schooling, supported by theories concerning human capital and economic and political organization (Meyer et al., 1992).

Thus, there is a historical logic in the expansion of the global education systems. Soysal and Strang (1989), in a famous paper on the "construction of mass education systems in nineteenth-century Europe" typify, within the European stage, three models of social development of education, given the diversified rhythms of construction and dissemination. They bring our attention to the existence of a political model⁷ for the development of education, a social model and a rhetorical model (as countries that can "represent" these models they mention, respectively, Sweden, the United Kingdom and Portugal).

It is not a trend or a mere mimetic isomorphism, to use DiMaggio and Powell's expression. On the one hand, the state's model of school education is a social subsystem, adopted by every modernized society. On the other hand, the modern education model is inscribed in contemporary history as a universal and long-term phenomenon.

Recently, with the expansion of the process of globalization, the nation-state started to lose its referential importance, mostly at the economic level (and, as part of the latter, at the financial level), in favor of a "global space", evermore present on the local and international stages. National rhetoric, mediated by the nation-state, which supports national education reforms, also seems to be replaced, to a great extent, by a global rhetoric, more powerful, more persuasive, legitimizing and uncomplicating. According to this view, globalization may hasten the emergence of global and structured education models and it may also reinforce their power to level the differences, thus weakening even further the state's role as mediator.

⁷ They call it "statist".

The model of analysis of the expansion of mass schooling we propose is susceptible to being applied to secondary education reforms (Azevedo, 2000), which are not only similar in several countries in Europe (and beyond), but they have also been presented with surprising synchronism. National reforms are born and affirm themselves by means of a supranational rhetoric that appears to translate, above all else, the appeal to scientific construction and to the general technology of modern education. In order to keep on developing at a national level, the transnational cultural model of the nation-state must resort to global ideologies and general transnational models of education, at the heart of which trends and views of reform – which cross the whole world and have at once an effect on developed countries– are conveyed.

National curricula and changes made to them are also, according to this perspective, hardly deniable expressions of the general transnational models of education and of the ideologies that support them. The differences that might show up here and there may reveal adaptations to diversity and specific national appropriations, but they can also be seen as variations on a global and globalizing ideology and on a general common model. This model must be familiar with the expansion of globalization and with the adjustments of the market economy.

2. The expansion of the ideology of modernization

In modernity we build a much rationalized way of looking at human beings and it, in turn, builds its own modernity. Education is at the center of this process of observing and building. This “common good”, whose “kindness” we barely question, became institutionalized, leading the way to a “standardized and rationalized system of investments and results” (Hüfner et al., 1992, p. 364), rooted in a global and universalist ideology of modernization. Education is an essential component of the progress and modernization technology and this presents itself as a social and political desideratum in most countries.

The expansion of the ideology of modernization works, therefore, as another conducting wire for the expansion of the general global education model (Carneiro, 1996; García Garrido, 1996; Ottone, 1996; Stoer, Stoleroff & Correia, 1990). Hüfner et al. (1992) have identified three revisions of the concept of modernization between the nineteenth-century and today. Initially, modernization emerged associated with the affirmation of the liberal bourgeois society, whose main aspirations were the political, economic, cultural and religious freedom and the emancipation of the individual. This notion of liberal individualism was later joined by that of an interventionist public authority, responsible for the institutionalization of the state. After the Second World War, following the processes of decolonization, the privilege of citizenship was extended to non-white

racess and peoples and there was also an expansion of the universalist ideology regarding the equality of human rights. Modernization was based on the presupposition that all States were equally sovereign and the United Nations were the radiating center of this ideology. At the same time, the doctrine regarding the specific economic benefits of education was also developing, through a rapid expansion of the theory of human capital, which supported the extension of the national education systems and reinforced the emergence of the modern global system.

During the seventies, the paradigm of the “single interdependent world” was institutionalized, both at the political level and amongst the world's scientific community. The development or modernization of nation-states proceeds in a climate of conflict, inequality and interdependence, and profound disparities between countries are registered. The idea of a New Economic World Order emerges, then, linked to the need for reducing inequalities and to the global perception of education as a crucial factor in national progress and equality between nations.

In this “cumulative process”, strengthened by the acceleration of globalization by the end of the twentieth-century, education continued to expand, the reformist discourses spread to the whole world and international competition in the field kept on growing. In an increasingly large number of countries, both the educational goals and the “general mandates” on childhood, family and education are determined by guiding principles, globally valid, which have been a part, since the nineteenth-century, of the European interpretation of modernity.

The rhetoric of modernization, an instrument for producing large social consensusess and a structuring element of the syntax of the dominant educational discourse (Stoer et al., 1990), is generally assembled in reference to more developed, modern and competitive economic systems, therefore creating a mimetic effect, which starts in the peripheral countries and leads them towards the countries at the core of the world economic system. This effect shapes the new “consensual” national policies on education and training. These general and abstract consensusess, indelible main pillars of those discourses, encourage the existence of an atmosphere of opinion that is particularly useful when it comes to putting together national education policies, both for its ability to attract and create convergence among the diversity of opinions and the conflicts of interest and for its inherent ability to hide that diversity and those conflicts. As Popkewitz (1988) points out, the reformist rhetoric in the field of education is very sensitive to these general consensusess.

Among the main ideological trends that underlie the development of education systems, J. L. García Garrido also identifies – besides nationalism and scholarly

optimism – the progressive or developmentalist notion. According to his formulation, the development of man and of society is conceived in a fundamentally materialistic order which places school systems and their institutions in an attitude of prevailing, when not exclusive, service to the economic progress and material well-being of societies and individuals (García Garrido, 1996).

Thus, what Roberto Carneiro calls the “industrial model of education” – that is, school systems inspired by the ruling economic system and whose “supreme mission” it is to support it, “without daring to touch its inexorable advancement” – kept on developing (Carneiro, 1996, p. 38). The expansion of school systems has, to a great extent, attached itself to this other component of the modern cultural system: school education is, above all else, a decisive instrument of economic growth, it occupies a privileged position when it comes to spreading and promoting the acceptance of economic rationality, productive efficiency, technical progress and social unification by means of consumption. Theories of development have been supported by this ideological basis and their text-books are filled with estimates of return rates on the investment in education, proving to society that it is a sound financial investment (Carneiro, 1996). The human capital ideology, its massive expansion and its vast and hegemonic power, inscribe themselves as the “crown jewels” of the broader ideology of modernization’s own expansion, an abstract general consensus which worked as an ideological steel frame that supported the expansion of schooling throughout the second half of the twentieth-century.

The market economy hegemonic position is perhaps clearer, due to the growing economic globalization process, when it comes to formulating education mandates. The “knowledge-based economy” synthesizes unequivocally and brilliantly the ideology which impregnates international agencies and the European Union and which inspires new political agendas for education and its technical and political pillars (such as strategic innovation, creativity, entrepreneurship, learning to learn). Education was handed the new and noble mission of training the new “producers-consumers”, the “*prosumers*” (OECD, 2006, p. 118), the new creative citizens of the twenty-first century, to obtain “new skills”.

Finally, we ought to mention that the defense of the expansion of schooling as an instrument of reinforcing citizenship and democracy has always been linked to this developmentalist ideological bloc. In fact, as we have seen before, education and training systems have also grown under a general political legitimization, following the belief that schooling contributes to form critical citizens, which will then lead them to be freer, more aware of their rights, more prone to respect others’ and to participate in social life. These rights and abilities were, however, politically

understood to be collective values that the school system would always be prepared to encourage.

Nevertheless, we have witnessed a growing latent tension between these paradigms which legitimize the political orientation that we find at the root of the evolution of national education systems. It is important not to cloud this tension and so we will come back to it later.

3. The evolution of the world's economic system

Other authors emphasize above all the emergence of the global education models developed within the framework of the evolution of the global capitalist market. The changes that take place in developing countries and which aim at adapting local education systems to the process of homogenizing internationalization ought to be seen, according to Adick, "in the broader context of the growing rule of the modern sectors of economy and of society in its process of integration in modern global society" (1993, p. 410).

According to this view of the theory of conflict, modern school, being a part of the modern global system, is the expression of the (globally competitive) capitalist way of production. Thus, the expansion of those transnational education models is not neutral, it is the equivalent of "Western" cultural dominion processes, which are little more than the expansion of "capitalist unilateralism" (Adick, 1993, p. 419).

To this perspective we might add the precision introduced by Morin and Nair (1997): what is becoming global is the economic liberalism, not the social version of capitalism, more or less Keynesian. This means that the policies that encouraged social models based on a "historical compromise" between capital and labor, well established in Europe, are being questioned by the current process of economic globalization.

Ginsburg and Cooper (1991) have also analyzed the reforming movements in several countries and they have concluded that there are parallel dynamics in education and they have also noticed that there were similar education policies taking place in different countries at roughly the same time. They relate these to the "fleeting movements within the world's economic system" (1991, p. 376) and argue that only a global and local reading of the crisis of the capitalist economy and of the legitimation of the state would allow for a proper contextualization of political rhetoric and national reforming actions.

The movements of education reform, which have taken place in very different countries since the beginning of the seventies, should also be inscribed in a "period

of global recession or crisis in the world's economic system" (Ginsburg and Cooper, 1991, p. 376) and they ought to be read in a global context. According to this perspective, if there are education problems waiting to be solved, they will remain largely unsolved once the reforms are completed. Therefore, keeping in mind the prevalence of the economic referent, reforming movements in education also derive from an "ideological work" unleashed by strained social groups, political decision-makers and social actors, who transform problems and social, economic and political conflict into educational problems. These will, from then on, need urgent and vast reforms, much more urgent and vast than the ones required by the basic structures of the economy and the state.

We believe, however, that what prevails internationally is a certain macroeconomic discourse, conveyed by big international organizations (which we will mention later), who work as an ideological bloc with a political rhetoric, legitimizing a number of reforms carried out worldwide. This rhetoric – formulated in a context of uncertainty, which prevails concerning both the evolution of interest and exchange rates and the perspective for economic growth and the need to harden international competition – grants superiority to a "new productive model", emergent and flaming, the post-Fordist production model, and it increases the adhesion to rhetorical and, in part, a-historical principles such as permanent innovation and the communicating, multifaceted, and networked company, which sells high quality and high added value products in the global market, always calls for high qualifications and guarantees high salaries, generally protecting jobs (Boyer, 1993; Durand, 1993). These principles are exactly the ones that are transformed into ideological axioms which in turn enhance, for example, anywhere in the world, the need for reforms that tend to integrate courses and school programmes in unspecialized secondary education, decidedly shaping recent education reforms in Europe.

Seeking to skip over real – and sometimes socially alarming and conflicting – segmentations of the labor market (vd., for example, Azevedo, 2000, 2001, 2005, 2006; Carneiro, 2001; Castells, 1997, 2004; Jarvis, 2000; Reich, 1993), standing under a great wave of unpredictability concerning the evolution of labor, employment and society, governments, unions and employers' organizations tend to, now more than ever, adopt as safe referents the lines of a rhetoric, expressed mainly at the international level, about the present and the future and the new functions of education and training systems. The new dynamics of cultural globalization and continuous – online – communication between different parts of the world do little more than accelerate and bring on the adoption of the ideological wave of post-Fordism, of flexibility and "new skills", anywhere in the world.

As we have made clear, nowadays this rhetoric tends to included itself in the competitiveness and globalization slogan (as it did previously regarding modernization), the new “knowledge-based economy”, as the key-word for the explanation of the evident ascendancy of the economic dimension among the ones that might be influencing recent education reforms.

Roger Dale (2000) has been highlighting precisely this point by adding that economic globalization is having its own obvious and important effects not so much on the rhetoric and curricula organization but on the state and the way national education policies are regulated.

4. The system of scientific communication

The dissemination of the semantics of modernization and the corresponding modern school model would also not have been possible without a social and institutional infrastructure ensured by an international system of communication and publishing in the field of social sciences and education. International organizations that operate at a global scale, such as the OECD, the UNESCO or the World Bank, provide guidelines “for an immense international education establishment” (Schriewer, 1995, p. 13)⁸. On the other hand, powerful multinational publishing companies control the production and distribution of the results of education research. In recent years, the Internet has also speeded up and eased communication and broadcasting fluxes when it comes to scientific endeavors.

Since 1925, the *Bureau International d'Éducation* [International Bureau of Education (IBE)] has been encouraging comparative studies and the dissemination of information in the field. In 1929, The IBE became the first intergovernmental organization to operate in this area and in 1969 it became a part of UNESCO. Its specialized bibliographical editions on current affairs, its regular assessment of ongoing events, its international network of information concerning education and the biennial organization of the International Conference on Education, in Geneva, are the elements which guarantee that the IBE contributes greatly to international scientific communication in the realm of education.

Several autonomous and non-governmental associations, whose relevance to the field of education is widely recognized, operate outside the specific sphere of large international organizations. After the Second World War, in 1956, the Comparative and International Education Society was created in the USA (and it

⁸ In the next topic we will focus our attention on the long-term action of international organizations. At this point we will consider them side by side other activating agents of scientific communication on education and training worldwide.

was initially known as Comparative Education Society of America); in 1961, London witnessed the formation of the Comparative Education Society in Europe and in 1970, during the First World Congress of Comparative Education, held in Canada, the time came for the World Council of Comparative Education Societies to be established. These associations invested, from an early stage, in the publication of periodicals which have become undeniable references for any researcher interested in education and training anywhere in the world. The *Comparative Education Review* was published for the first time in 1957 and in 1964 it was the *Comparative Education's* turn.

The International Association for the Evaluation of Educational Achievement (IEA) was created in 1958 and its international studies on the results and performances of students in specific curricular areas has led to significant international recognition. A very good example of that is TIMSS (Trends in International Mathematics and Science Study) (*vd.*, among others, Adick, 2002; Cussó & D'Amico, 2005; Jakobi & Martens, 2007; Lindblad & Popkewitz, 2001; Lingard, 2006).

These big international organizations have served as models for the creation of several other regional and national organizations, some of which outside the hegemonic sphere of Anglophone expression – such as the Association Franchophone d'Éducation Comparée, established in 1973 – and their published material inspired dozens of other national and international publications.

From 1970 onwards, the World Congresses of Comparative Education became important global forums of scientific communication, organized in the five continents, as an expression of the worldwide reach of comparative and international studies on the subject of education.

This system of scientific communication is considerably hierarchized: in the center we find the Anglo-American production and distribution and in the periphery we find every other example of scientific communication in the field. Thus, what is predominately conveyed as relevant scientific knowledge is the result of a particular way of looking at the world which then becomes universal (the *International Encyclopedia of Education* is a good example of this). Researchers tend to specialize in and focus on the international centers, much more than on their national colleagues, as Lauglo (1995) points out. In the scientific communication networks in this field, communication is chiefly vertical, hierarchical and, as a result, unequal. Despite the fact that we usually associate horizontality, as an almost matricial characteristic, with the way modern information technology and the Internet work, it is also verticality that dominates the communication fluxes, attracting “users” from the periphery to the center, from other languages into English, from several countries into global “search engines”.

Our argument is that the system of scientific communication, expanded and permanent, favors general harmonization among all modern school systems. In fact, as the number of countries that, supported by scientists, technicians and education researchers, promote education reforms rises, different education systems tend to move in the same direction and to become more homogeneous. As Meyer and Kamens (1992) suggest, what is conveyed as functional will be so everywhere. In the veins of this increasingly fast international scientific communication system run ideologies, which are consequently transported and broadcasted. Technical functionalism is almost a hegemonic ideology in the modern education system, these researchers underline. What is seen as being appropriate for central metropolis is also appropriate for the periphery. In the latter, in turn, it is difficult to find an expert putting forward arguments that promote a different and divergent route, when it does happen, the experts commonly find their discourse undervalued for lack of legitimacy – which is conferred almost exclusively to the industrialized global system.

Let us examine the conclusions of two empirical studies. In 1996, Pam Christie, with a study about the secondary (higher) education reforms in South Africa, showed the strong impact of global orientations, included in the most recent material published by the EU, on local needs and interests and on the course of said education reforms, signaling furthermore the resulting anachronism – the incoherence between the fundamental rhetoric of the reforms and the local economic and productive reality (post-Fordism, on one side, and Taylorist production, on the other). After studying the way in which recommendations and norms from international organizations pierce through and impregnate the guiding principles of national education policies, UNESCO being the most noticeable case, McNeely (1995) has also concluded that the global interchange of educational ideals and information is a legitimate basis that supports the organization of each country's education system.

An equally disseminating scientific and ideological role is played not only by the movement of several thousand graduate and post-graduate university students towards countries at the heart of the global economic system and scientific production, who later return, in part, to their peripheral countries of origin, but also by international congresses and seminars, bilateral meetings between countries and by networks of experts. In a more informal way, these means of communication influence the scope and direction of the changes taking place in the institutional education systems. Several authors have underlined the relevance of some of these international meetings. Let us look at a couple of examples. Husén, Tuijnman and Halls (1992) argue that the view that school education is a primordial factor of social and economic progress was largely conveyed, during the sixties, by two important international conferences. The first was held in

Washington, in October 1961, under the patronage of the OECD, and it was followed by an echo, later in the same year, in Kungälv, Sweden. The second one is known as the Williamsburg Conference, and it took place in Virginia (US) in 1967, gathering pedagogues and political leaders from all over the world. During that meeting, P. Coombs presented, for the first time, his famous report on *The World Crisis in Education*, exactly a year before student movements stirred Europe.

We could also mention a recent meeting with relevance to this study – the International Conference of Santa Barbara, California, which took place in 1993 – around the themes of investment in human capital and economic performance. Buechtemann and Soloff (1995), while assessing the outcome of the meeting, realized that representatives from different countries faced the same challenges concerning the general themes and they pointed out that the growing generalization of education and training was a central concern among the participants.

As an example of an international network of experts we could mention NORRAG (Northern Policy Research Review Advisory Group on Education and Training). This is a network of individuals and organizations – connected to universities, public and private research centers, development agencies and non-governmental organizations – created in 1986, which aims at promoting the interaction between research, policy and practice in “Northern” countries with the ultimate goal of supporting the development of education and training in “Southern” countries. This network organized, for example, in 1994, in Geneva, a round table to discuss theoretical and strategic issues raised by globalization pertaining to education and training policies.

We can, thus, look at six types of facilitators of communication and cooperation which act internationally, building referents about school education (Table 2). First, there are international organizations and experts' networks. Among them we find the previously mentioned World Council of Comparative Education Societies and the International Associations for the Evaluation of Educational Achievement (IEA). A second type is made up of international seminars and conferences, subdivided into regular and irregular initiatives. Among the first, we find the International Conference on Education, institutionalized by the UNESCO, which takes place in Geneva; among the second, adding to the ones already mentioned, we find the World Conference on Education for All, held in Jomtien, in 1990. A third type results from the annual movements of students from the peripheral countries to the center, in order to pursue graduation and post-graduation degrees, and the subsequent return to their home countries.

1. International associations and experts' networks	Examples: World Council of Comparative Education Societies; IEA; NORRAG
2. International seminars and conferences	Examples: International Conference on Education; World Conference on Education for All
3. Annual movements of graduate and post-graduate students	
4. Publications with international circulation	Examples: <i>The World Crisis in Education</i> ; <i>International Encyclopedia of Education</i> ; <i>Education at a glance (OECD)</i>
5. International cooperation programmes	Examples: Leonardo, Socrates, Grundtvig, Erasmus
6. Electronic networks of communication and online and offline databases	Examples: Institutional websites (Eurydos, Educnet), small groups' websites, electronic magazines and researchers' personal web pages

The fourth type includes publications with international circulation, which must be subdivided into international reports, encyclopedias and statistical indicators. The most noticeable examples are Philip Coombs' *The World Crisis in Education*, edited in 1968 and 1985, the *International Encyclopedia of Education* and the publication of the OECD's statistical indicators, *Education at a glance*, and similar publications from the UNESCO and the European Union (*Key Data on Education in Europe*). The fifth kind of facilitator includes institutionalized programmes of international, bilateral and multilateral cooperation, developed by almost all international organizations that operate in this realm and which mobilize considerable financial resources, allowing thousands of experts from different parts of the world to continuously circulate and communicate. Within the European Union this type of actions is particularly relevant since the mid-1980s. The sixth and last type concerns the electronic networks of communication, among which the Internet is the most relevant. It has become, in a few years, a powerful facilitating instrument of worldwide intercommunicability. Online databases about education and training issues grow and multiply every month: from the international (Eurydos) to the national kind (Educnet, in France); from the institutional (universities and research centers) to the individual kind (researchers' personal web pages). Being used as a horizontal communication network among researchers and people interested in education issues, the Internet does not circumvent the dominant flux from the center to the periphery, even though it applies to new interconnections, whose reach can hardly be estimated.

To sum up, the international scientific community has a double and relevant role when it comes to institutionalizing transnational education models: on the one hand, because, from a technical point of view, they generate skilled workers, data and techniques, and they conceive research models and publish; on the other hand, because they formulate theoretical conceptions of education as an “abstract institution, standardized and rationalized, and these conceptions make comparative study seem useful and necessary” (Hüfner et al., 1992, p. 392), which internationalizes, *ipso facto*, the educational institution.

5. *The long-term action of international organizations and the case of the European Union*

A certain structural conformity and the organizational isomorphism of the world's school education systems have been equally and particularly assured, in the second half of the twentieth-century, by the long-term action of international organizations. Among them we find the UNESCO, the World Bank, the OECD, the Council of Europe, philanthropic foundations such as the Ford, the Rockefeller, the Carnegie or the European Cultural Foundation, as well as their respective international technical assistance networks. International organizations have become greatly important when it comes to promoting comparative research about education (Hüfner et al., 1992), thus contributing to the “scientific construction” of education. They work as a sort of organized “transporters” of global systems, exercising a real global pressure in their quest for harmonization.

Several authors have pointed out the influence of international organization on national education policies. In the Portuguese case, we could mention the cases of, for example, Sacuntala de Miranda (1981), Stoer et al. (1990), Antunes (2001, 2004, 2005a, 2005b), Cortesão e Stoer (2002), Nóvoa (2000), Seixas (2001), Alves e Canário (2002), Estêvão (2002), Teodoro (2003), Barroso (2006), Pacheco e Vieira (2006). Nonetheless, this influence is seldom addressed in a dynamic fashion. In fact, the globalization of education is generated in the movement of reciprocal international references. There is not only a movement from the outside towards the inside, even if this holds the power that goes from the center to the periphery; there is an important movement of the inside towards the outside, meant to grasp an additional significance. Let us look briefly at some of the most noteworthy traits of the action of international organizations, with a particular emphasis on the case of the European Union.

The OECD has particularly influenced the European, the American and the Western Pacific areas, while the United Nations organizations, chiefly the World Bank and the UNESCO, have mainly influenced developing countries. For the last three decades these organizations have expanded the ideology of modernization,

highlighting in particular the positive effects the investments in education had on demographic and sanitary features, on literacy, life expectancy and consumption behavior. In addition to having evolved homogeneously, the national educational systems have also developed surrounded by a remarkable optimism. This has been based on the belief that educated people transform society's opportunity structures (Meyer, 1992). The monographic studies, based on a single country, and the analytical and statistical studies of these pan-organizations have greatly contributed to the appropriation of this concept. With the fall of the Berlin Wall and the end of the Soviet Empire its reach has become global.

The practice of systematically publishing national monographic studies on education was initiated by the OECD, after a 1961 deliberation, and several dozen "Reviews of National Policies for Education" have been published and have also proved to be particularly significant in their ability to influence the European continent. Hübner et al. (1992) have pertinently emphasized that national monographic studies are a good example of the ways in which the world's education system is built, mainly for two reasons: on the one hand, they are guided by an apparent invisible set of concepts and shared notions and they also have common norms; on the other hand, their results are mobilized to support general conclusions as regards education policy.

Adding to these monographic studies, the OECD has developed several programmes and multiple activities. In 1968, it created CERI (Center for Educational Research and Innovation), an organization based in Paris which develops an intense activity in the field of international studies on education and training, feeding a very significant number of publication in English and French throughout the years. Recently, the OECD has promoted, for example, an international movement of reflection about the new paths of technical teaching and vocational training, in face of the changes that have affected the economy and social demand (VOTEC it was called). Since 1989, and for five years, experts from every continent have gathered for a series of seminars which took place in Switzerland, in the USA, in Portugal and in France. In addition to this, several documents produced by specialists have been disseminated, some of which were later published as official OECD documents, a part of which has since then been translated into languages other than English and French.

Nevertheless, the OECD's influence on national and international education agendas – in terms of gathering, treating and circulating indicators on education – has perhaps never been greater than it is nowadays. This is, for Jakobi and Martens (2007, p. 248), "one of OECD's main pillars, for which it has received attention, recognition and fame".

Up until the 1990's, despite the OECD's significant efforts and the creation of specific Working Groups, the available indicators were based on data offered by national entities (often times following different methodologies) and focused on input variables, leaving aside the processes and the results of educational systems, which made it difficult to produce international comparative studies.

The situation changed in the 1980's, mostly under the influence of the United States of America, following the publication, in 1983, of the "A Nation at Risk" report, which alarmed the Reagan Administration and led the country to turn to the OECD for international comparative studies that would allow it to evaluate its position in the global context (which shows the need to guarantee a political and economic hegemony).

Beginning in 1995, work has been done to allow for a regular publication of comparative educational results (of students around the age of 15) about "learning levels" in the fields of reading, mathematics and science. Presently, it also gathers in over 40 countries data on each education institution and the social and family context.

The PISA (Programme for International Student Assessment) is nowadays the most famous instance and one of the most powerful examples of the institutionalized action of the world's educational system.⁹ In countries like the United Kingdom, Germany, Denmark, Austria, Spain and Portugal, the publication of these data has triggered intense political debates, a genuine shock effect, the most notorious example of which took place in Germany in 2005 (Jakobi and Martens, 2007). Mimetic isomorphism appears to be the best path to follow, even more so when based on the diffusion of the "best [national] practices" throughout the world.

UNESCO is the organization that has been supporting international cooperation in the field of education the longest. Among other international initiatives, it regularly promotes the already mentioned International Conference on Education, which brings together several Education Ministers, experts and national and international organizations from over 120 member states. According to Juan de Luis Cambor (1989), this Conference is a global observatory on the state of education throughout the world. The 1986 Conference, for example, focused on secondary education (a recurring theme whenever these initiatives take place) and adopted a significant recommendation (no. 75), aimed at national Education Ministries, concerning "the improvement of secondary education: objectives, structures, content and methods".

⁹ At the moment of publication (2007), the OECD will release the results of PISA 2006, on a predetermined day (4th December), at a predetermined time (to allow for simultaneity in different time zones) and in several predetermined places (Tokyo, Brussels, Berlin, London, Washington and Paris)

Furthermore, UNESCO encourages regular international fluxes of seminars and publications on education (for example: *Perspectives*, a journal published in three languages) and it supports the existence of organizations which act amply and vigorously in the field of education and training, such as the International Institute for Education Planning (Paris), the Institute for Education (Hamburg) and the UNESCO's organizations for regional (continental) coordination.

The World Bank – in this case mainly through financial loans – also plays an important role in the development of education at an international level, particularly in developing countries. Since 1963, as Heyneman (2007) points out, the World Bank has attributed, under the orientation of the human capital theory (divulged by authors such as Schultz, Becker and Bowman), vast sums to the “diversification of secondary education” (Heyneman, 2007, p.169) as well as, later on, during the 1980's and 1990's, to primary and academic education. The World Bank's funding has clearly influenced national priorities and policy, for example, as regards the strengthening of the private participation in the cost of higher education or the creation of systems of loans for poorer students, which allow them to pay for university enrollment.

Besides the World Bank, the programmes of fiscal and financial adjustment have also involved the IMF (International Monetary Fund) (Mundy, 2007). The effects of this funding on education policies in Latin America and Sub-Saharan Africa have been patent, frequently upsetting national political priorities (technical and higher education instead of primary education and support for teachers) and leading countries to create veritable and more or less useless “white elephants” (Heyneman, 200, p. 196).

The role of the International Monetary Fund is also highlighted by several authors. Almerindo Afonso (2001) stresses its undeniable role in promoting externally-defined priority agendas and in its ability to dictate parameters for national states reforms, in the present context of transnationalization of capitalism and hegemonic globalization. Boaventura de Sousa Santos states that this “neoliberal consensus” imposition, which has been controlled by the IMF and the World Bank, has also accentuated “the globalization of poverty” (Chossudovsky, 1997, quoted by Santos, 2002, p. 41). Robert Boyer (1999) emphasizes the IMF's underlying mistake in imposing economic measures throughout the world following the “same size for all” model, and Dale (2000, 2006) remarks on the fact that this aid from the IMF and the World Bank leads to Structural Adjustment Programs that condition Governments and place countries under the orientation of neoliberal globalization (defined in terms of what is now known as Washington

Consensus¹⁰). That is why Habermas (2000, p.2) argues that “globalization is not *just* an ideology”. Finally, Ramirez (2006) reminds us of the central role played by these organizations in imposing agendas on countries dependant of external financial aid, which leads nation-states to become coercive sources of institutional isomorphism.

Modern education, as a highly standardized global institution, owes a lot to the efforts of comparison promoted throughout the years by these organizing structures that knew how to combine technical assistance and financial aid.

But before we focus on the case of the European Union, two conclusions must be drawn. First, these international organizations convey, before all else, the interests and the perspectives of the countries at the center of the global economy and many of their programmes serve those interests and perspectives. Second, the effect is not only isomorphic: in many cases it is imposing, which leads us to the existence of coercive adjustments (Dale, 2000) in national education policies and reforms.

Even in the European Union, where the field of education has been relatively absent from the strong dynamic of harmonization taking place within the economy, the markets or the monetary system, several authors detect a certain “denationalization”, starting exactly in the field of education and vocational training. It is important for our argument to understand in more detail how the reforming tendencies mentioned before are in a way conveyed and amplified in the European arena.

The Galician researcher A. Costa Rico (1995) observes the existence, during the 1990's, of a greater convergence, pointing out to what he calls the “European educational project”, that is, an articulated set of programmes of communitarian financing in the field of training and in the establishment of exchanges and partnerships, which bring national educational systems closer together.

Husén et al. (1992) establish 1989 as the beginning of an era of harmonization among the European Union's school systems and they argue that this process has been guided less by any formal determination than by some sort of “hidden agenda” (1992, p. 18). To the latter have contributed the economy and the labor markets' structural adjustment and, most of all, its effect on other social spheres, among which we necessarily find education and training. As Husén et al. (1992) point out, even if the goal is not explicit, some degree of harmonization will have to take place and if it is true that, in the field of education, cultural resistance will be a

¹⁰ The Washington Consensus comprised a set of ten policy prescriptions: fiscal discipline, redirection of public spending, tax reform, trade liberalization, unified and competitive exchange rates, market liberalization, liberalization of inward foreign direct investment, privatization, deregulation and security for property rights (Williamson, 1990, but also Dale, 2007; Held, 2005, and Rodrik, 2001).

reality, it is also important to bear in mind the effects that adopting converging or common economic and political principles and practices will have on each country.

Even before the new Treaty on European Union, signed in 1992 by the European Economic Community countries, several cooperation activities concerning these spheres took place. The 1957 Treaty of Rome includes three articles concerning education: all focus on the need for mutual recognition of diplomas and certificates or on the importance of establishing general principles for a common policy of vocational training, as in article no. 128. Both this normative text and the policies that rendered it concrete show that a doubly reductionist notion of common action prevails in the field of education, seeing that it is restricted to vocational training and that it aims solely at promoting human resources adjustments within the expanding common market countries.

In any case, the cooperation process was slow. It was only in 1963 that the Council approved the first relevant decision, establishing a set of principles for the creation of a common policy on vocational training, and the first meeting of Ministers of Education did not take place until 1971. The Janne report, *Pour une politique commune de l'éducation* [For a common education policy], elaborated in 1973 by a group of experts following that meeting, represents a first and important step aiming at redirecting cooperation efforts towards a wider education sphere, in an attempt to avoid separating teaching and vocational training. The second would appear in 1974, included in the Ministers of Education's resolution on "Cooperation in the education sector". Nonetheless, it was not until 1976 that the Council and the Ministers launched the "First community action plan on education" and created a permanent Committee on education.

Following these steps, cooperation on education and training has remained as a developing dynamic among member states, leaving aside the main common decision bodies. Furthermore, the respect for national specificities is expressed with the utmost clarity and policy harmonization is rigorously and vehemently set aside.

Meanwhile, only in the second half of the 1980's would accelerating steps be taken towards cooperation in education and training. In 1980, Eurydice, a network of information on education is created; in 1981, education moves from DG XII, where it had been for 10 years, to DG V, which also includes training, social affairs and employment; in 1983, the European Social Fund is revised and, in 1986, the Single European Act is signed. Despite having come a long way, education had failed to become a common action ground and vocational training remained overdetermined by its dependence from the evolution of labor and the labor market's needs.

The network of information on education, Eurydice, has been developing an important work in comparative studies. Particularly after 1992, several comparative thematic studies have been produced: for example, in the field of pre-school and primary school education, concerning issues such as school hours, teachers' training, fighting school failure and administering and financing education systems. Moreover, Eurydice, in cooperation with the Commission services, is in charge of the Eurydos database and has been publishing, for the past years, thick volumes of comparative descriptions of the teaching and early training systems of all member states; it has also, more recently, published an important new report on key data on education in Europe.

This effort, which relies, in every country, in a National Unit of the Eurydice network, inevitably leads to a silent and continuous effect of approximation in speeches and procedures, in the establishment of common priorities and in the definition of common policies. The European citizenship, recognized in the Maastricht Treaty, is also built within this network of information, which represents, it must be highlighted, an enormous effort to overcome tensions and conflict between countries and national cultures, and this in turn supports the formation of new circles, ever wider, of common education policy, that is, the slow institutionalization of an European educational system.

In this context, national languages – the greatest expression of different cultural identities – enable the approximation to the world's educational system. When, for example, Eurydice's network documents – namely the descriptive and comparative analyses of European educational systems – which in 1997 included 12 countries and which are published every 10 years, start to include 31 countries and the respective translations into every national language, we will be reducing diversity and promoting uniformization through a process in which the center invades the periphery by means of a cultural manifestation of identity from the periphery itself, national languages.

On the other hand, there is the permanent coming and going of experts from all over the EU, who gather hundreds of times every year around many different tables to debate particular and general aspects of education and training policies. Little by little, a mesh of personal and institutional relationships is woven and it strengthens a common fabric. The permanent creation of *inter-national* partnerships – financially supported by the Union, in the context of several programmes, among which we highlight, beginning in 1995, the Socrates and the Leonardo – greatly reinforces this fabric, which is only completely disorganized and disconnected at first glance. This might, however, be the process that has contributed the most to make the plan of building a common identity viable, namely by, in an apparently naïve network system, easing the release of tensions

and conflicts, forever latent, without any imposition of mandates and norms which will promptly lead to more or less unsolvable gridlocks.

We should also mention a set of efforts from the European Commission, carried out through the DG XII, aimed at encouraging studies and research in the fields of education and training. The Council's decision concerning this matter¹¹ clearly stated the objectives of the research: to support member states in their efforts to reinforce the links between research, education and training thanks to research and circulation of good practices and innovation (European Commission, 1996). The specific fields which received funding can be curiously divided into important spheres with a significant potential for international harmonization: (i) the policies and actions efficiency and the European unit and diversity, (ii) the methods, the instruments and the technologies, quality and innovation in education and training and (iii) education, training and economic growth.

Meanwhile, the efforts towards harmonizing qualifications and diplomas went on, in an attempt to make it easier for the workforce to circulate within European grounds. The first efforts towards establishing systems of mutual recognition of diplomas date back to the 1960's, but it took 16 years to establish a directive for pharmacists and 18 for architects to have theirs, and all this concerning professions under regulation. Only in 1988 did the Council approve the first general directive on higher education diplomas (Council Directive 89/48/CEE); the second was adopted only in 1992, after a long and painful negotiation process.

The second half of the 1980's was the time for cooperation programmes in the field of education and training: in 1986 the Comett is created, aimed at encouraging cooperation between universities and enterprises regarding training in the field of technology, in 1987, it is Erasmus' turn, a programme aimed at fostering mobility among university students and professors; in the same year Petra is also created and its goal is to support vocational training of young people and their preparation for adult and working life; in 1988, it is Delta – a programme for the development of learning through technological advance – and YES (youth exchange scheme) for Europe's turn; in 1989, Lingua – for the promotion of foreign languages learning –, Force – which stimulates investments in vocational training –, the NARIC network – to foster recognition of academic titles and credits – and Eurotechnet – to promote technological innovation in the vocational training field – go into operation. If it is true that these programmes, and the ensuing financial efforts, represented a significant increase in European cooperation in terms of education and training, one must also add that, on the one hand, their creation processes were not peaceful – the Court of Justice was even called to resolve occasional conflicts – and that, on the other hand, the economist approach to

¹¹ We are referring to Area II of the TSER programme (15th December, 1994).

cooperation not only remained in place but was reinforced. Two elements, within a longer list, support this view: (i) the Court of Justice's decision, which allowed the first two programmes to start and which had to resort to the argument that cooperation was part of the common policy on vocational training (Treaty of Rome, 1957); (ii) in the reorganization of the European Commission, which took place in 1989, education issues were once again placed within the framework of a task force for "Human Resources, Education, Training and Youth". Following the economic crisis of the 1970's and given its permanence and aggravation in the second half of the 1980's, particularly when faced with growing youth unemployment and the EU's loss of international competitiveness, the community's rhetoric and practices in matters related to education yielded increasingly to its immediate economic functionality. Despite all this, the reaffirmation of the importance of education for the European construction and social cohesion was a constant throughout the years.

In the mean time, a number of organizations that allowed for and extended the effect of this community policy were created. Among them we find the Advisory Committee on Vocational Training, which gathers social partners and provides opinions and recommendations, the IRDAC's (Industrial R&D Advisory Committee) working group concerning education and training issues – including these fields' connection with industrial development and competitiveness – which emits opinions and prepares reports for wide circulation in several languages, the European Centre for the Development of Vocational Training (CEDEFOP), which plays an important role both in the study of and comparison between national systems and in the creation of systems for matching and comparing qualifications.

The turning point (Costa Rico, 1995; García Garrido, 1996; Nóvoa, 1995) in the way we face the role of education and training issues in the construction of the European Union came with the signing of the Treaty on European Union (1992). The former Title III, dedicated to "Social Policy", was replaced by the new Title VIII, "Social Policy, Education, Vocational Training and Youth". Within the latter, chapter 3 refers to "Education, Vocational Training and Youth". The Treaty plays a key role in this evolution, by consecrating, in articles 126 (education) and 127 (training), an European dimension to education and vocational training, fostering cooperation among member states, creating room for the Union's intervention when it comes to supporting and complementing the action of these states and contributing to the development of quality education at a European scale. This led to the creation of a political ground favorable to the development of a broad range of activities and to a deeper cooperation. Corollaries of this decision are the European Commission's White Papers on "Growth, Competitiveness and Employment", from 1993, and on "Teaching and Learning. Towards a Learning Society", from 1995; the declaration, in 1995, of 1996 as the European Year of

Education and Lifelong Training; and the new community programmes Leonardo (vocational training) and Socrates (education). Besides national states, metanational dynamics now grow and greatly condition and configure national policy on education and training.

The European Commissioner Viviane Reding said, in 2002, that “Socrates, Tempus, Leonardo da Vinci and Youth have for years been the most important means of supporting and promoting cooperative action in education, training and youth within the EU and beyond, and, most importantly, of bringing a European experience to millions of individuals in these countries” (2002, p. 3). The European Union’s action in education, training and youth involved, as we have mentioned, several programmes – Erasmus, Comett, Socrates, Youth for Europe, Lingua, Petra, Force, Eurotechnet –, during the 1980’s and early 1990’s. In 1995, following a restructuring of these actions, three major programmes were created – Socrates, Leonardo and Youth for Europe – which, besides assembling previous initiatives, widened the range of action to include adult education. These major programmes went through two phases. The first took place between 1995 and 1999, after which they were revised and relaunched for the 2000-2006 period. This new phase introduced “partnerships”, which led to a new wave of international initiatives of cooperation in education, training and youth.

During this second phase, Grundtvig – a programme which fostered cooperation in adult education and fought to prevent early school leaving – and Minerva – which allowed for the development of cooperation in distance learning and e-learning – were introduced. This diverse and heavy range of cooperation initiatives also contributed to the enlargement of the Union, from 15 to 27 countries, by involving candidate countries in specific programmes such as Tempus (from 1990 onwards, right after the Fall of the Berlin Wall).

Two cooperation programmes deserve a special mention: the Bologna Process and the Bruges Process. The former was built out of the will to create “a higher education European space”, sometime until 2010, and it was the result of an initiative by the European Ministers responsible for higher education, who gathered in Bologna in 1999. Since then, the cooperation has deepened to the point of having brought major transformations to the way higher education works and is organized in most European countries, which resulted from processes of adaptation to a common model of academic structures and degrees, thus guaranteeing graduate and post-graduate students’ mobility.

The process of Bruges, the city where the EU’s Directors-General gathered, aims at increasing cooperation in European vocational education and training, a political view validated and consolidated during the 2002 Barcelona European Council. Through this course of action, the development of instruments to reinforce the

transparency of qualifications and professional skills among EU countries was intensified. Among these instruments we could highlight the adoption of a credit transfer system (similar to one in place for higher education) for vocational education and training, at all levels, and the adoption of a set of common principles for the validation of non-formal learning.

In 2002, the Erasmus Mundus Programme was created to facilitate cooperation with third countries regarding higher education.

The networks of cooperation, that have been developed in the meantime between member states, have weaved webs of meanings and representations, powerful interconnections of thought, in which the different participants from several countries draw complex networks of goals, plans and projects, necessarily interconnected, hence forging European bases for the orientation of national education and training systems. As Chisholm (1995) opportunely mentions, there are notions (such as mobility, competitiveness, social cohesion) which slowly become political key concepts, which inform and mould national and community policies.

Notwithstanding the slow evolution of community cooperation in terms of education, the bi and multilateral programmes constitute effective instruments and powerful factors of harmonization among member states. The endless series of projects already developed, the established partnerships and the regional consortiums in place contribute in several ways to this: on the one hand, through the products which are generated, spread and which are then used almost everywhere (databases, information, thematic files, methods); on the other, through contact networks, projects and experts networks and also through the common analysis they generate, in terms of notions and definitions, in terms of the adopted common nuclear curricula and also in terms of common methodologies integrated in the activities (Gordon, 1995). From a long and not very successful attempt to create complete and complex systems of correspondence and comparability between certificates and national education and training systems, we move on to the "transparency" route, that is, we then begin to understand what is different, to transmit and exchange information, to build a myriad of multilateral, common and small projects under the effect of a regulating ideal (Nóvoa, 1995, 2002) of national policies from the different nation states. This is also what Hargraves (1989) argues when, analyzing the impact of community deliberations concerning education and vocational training on the evolution of political perspectives in the United Kingdom, he points out to the existence of clear connections between community and national policies. Despite not being evident in official literature, he goes on to say, these connections are present in concrete policies that have been formulated and executed throughout the years.

García Garrido (1996) predicted, by way of the window that the Treaty on European Union opened, a very different future outlook from the one that existed up to that point. In a while we would be facing, he forecasted, a “European school system” (1996, p.35), respectful of the diversity of structures and of the cultural diversity of nations and European regions.

In fact, following the adoption of the “Lisbon Strategy”, in 2000, by the European Council, the creation and constant revision of the “Detailed work programme on the follow-up of the objectives of education and training systems in Europe” (Official Journal of the European Communities, 2002) appear to confirm this insight. Adding to the establishment of fairly “concrete” goals, which each country should meet by 2010 (for example, to reduce in half the number of teenagers between the ages of 18 and 24 who have only attended primary school and who did not participate in complementary education and training actions; by 2010 at least 85% of 22-year-olds in the EU should have completed upper secondary education), we also find a mention to the reference values and to the major goals, which always appear in a careful comparison with the educational development levels of the United States and Japan (Azevedo, 2007c; Nóvoa DeJong-Lambert, 2004).

The Council of Europe, in turn, developed, during the 1990's (1991-1996), an important activity called “A secondary education for Europe”, addressing in several symposiums and later in monographs issues with a tendency towards harmonization, such as the goals and aims of secondary education, teachers and non-teaching staff training, multicultural education and the role of the local community. Moreover, the Council of Europe, a self-entitled pan-European intergovernmental forum on educational cooperation, has published monographic studies concerning secondary education in each member state. These studies follow a common standard of presentation and in them we find both the national differences and the tendency towards international convergence. In 1997, the education ministers of the 47 countries of the Council of Europe, gathered in Norway following a decade of reflecting on secondary education, adopted a common specific recommendation regarding this stage of education, convinced as they were that “educational cooperation in Europe may play a determinant role in light of new challenges (the acceleration and unpredictability of economic and technological changes, multiculturalism and the dangers of intolerance, the skepticism and apathy towards political life), while respecting common fundamental values” (Conseil de l'Europe, 1997, p. 9).

The prospective studies that the major international cooperation organizations are devoting their time to with renewed emphasis are also reinforcing the construction of the world's educational system, fabricating, together, an

increasingly common future. UNESCO ventured to elaborate a report on Education for the twenty-first century, coordinated by Jacques Delors, and it launched, the following year, in 1997, a reflection on the future of the human species, called *Entretiens du XXIème siècle*. The European Union, through its “Forward Studies Unit”, has supported a study of scenarios for 2010, concerning possible futures for Europe, giving special attention to the issues of European identity and multicultural integration. The OECD has also launched a series of international activities around the theme of “futures”, among which we find the Forum for the Future, the Future Studies Information Base and the International Futures Network.

The private philanthropic associations are also a major part of this construction, particularly after their first summit in Bellagio, Italy, in May 1972, since they promote and maintain international networks of experts and technical assistance programmes which make the world's educational system more actively present. In the case of Europe we would like to highlight, for example, the European Cultural Foundation – which supports research organizations and institutes, European information networks on education and publications on education and training – and the van Leer Foundation – which supports local projects of educational development in several countries. It is important to understand the extent to which there are different ways of “observing” and “applying” economic mandates on education, particularly in what refers to the role of these independent associations.

To summarize: the continuous and long-lasting action of international organizations working in the educational sphere is an active part of the construction and action of the world's educational system. As António Nóvoa argues, “it is about, on the one hand, building categories of thought, organizing languages, showing solutions that will become dominant schemes in approaching education issues and, on the other, it is about acting on a given number of fields (employment, training, qualifications, etc.) which trigger reconfigurations of the educational system” (1995, p.18). In fact, international organizations operate by isomorphism, by imposition, by externalization, as we will see later on, and by the growing influence on education policies and education regulatory models.

6. *International and comparative education*

In the field of education, international interdependence is a contemporary global history fact. The analysis of the “world's system” brought up again the need to consider the background of relationships of interdependency, which encompass the whole world, in order to understand present social macrostructures. According to Arnove (1980), if we limit the analysis of education to the national sphere, we

will fail to understand the country's position in the international system, which is the same as forgetting an important element which conditions the effects of the *intra-national* economic, political, social and cultural factors on education.

The design of the global society's educational institution is due also to the continuous effort of the International and Comparative Education, within and outside the action sphere of the World Council of Comparative Education Societies, its congresses and publications. Education is such an international institution that national academic and research organizations have maintained a permanent interest in comparative work (Hüfner et al., 1992). To this national interest one must add the involvement of international networks of experts, the bilateral relationships between countries and the action of the "world's system of international organizations" (Hüfner et al., 1992, p. 393). Well, these constant investments in comparative work increase education's status as a global institution. As C. Adick (1993) mentions, the comparative education's analytical labor will, on the long run, draw the model-school as an educational institution of the global society.

The modern type of education, by participating actively in the ideology of modernization as a central ingredient of progress attainment, as we have mentioned earlier, has made comparative work easier and more attractive. The conveyed educational models are so standardized and international that comparative research must be considered an integral element of the system. The diversity of societies and contexts does not constitute, therefore, a significant barrier to comparative work. The complexity is greatly reduced by the "homogeneous, rationalist and modern" (Hüfner et al., 1992, p. 397) quality that coats the notion of education, which is in turn incorporated by every modernizing and progressive society. These authors refer to the existence of a "worldwide standardized formal classification system" (Hüfner et al., 1992, p. 369) which results from and produces the international comparative analysis.

Thus, the emergence of the world's educational system is also the result of a body of research, based on empirically supported studies, that has been amassed throughout the years.

Comparative research, as an appropriate field for discovery and dissemination of ideas and ideologies of the scientific and professional world, is "an intrinsic part of the system" (Hüfner et al., 1992, p. 366), mainly by defining programmes, analyzing problems and suggesting recommendations and solutions. In other words, national changes and reforming movements are nationally valid also because they are internationally validated, by comparison and by their adoption, as guiding principles, by economic and culturally dominant countries. We once again realize that, even if it is true that local circumstances determine the adoption

of this or that formal route of a country's school education, it is also crucial that we take for granted the virtues of the modern school model, spread all over the world through common ideologies and theories (Meyer, 1992c). Educational policies and the evolution of a nation's educational systems are usually more influenced by standardized external criteria than by specifically internal criteria. As we have mentioned, scientists and researchers in the field of education, international meetings, networks of experts and international organizations are the main conveyers of the "abstract consensus" that Meyer talks about (Meyer, 1992a, p. 23). The models keep on copying each other for years and decades and standardization keeps on growing.

In the last decade, as we have seen, several international organizations have contributed to this comparative work, mainly by producing monographic studies concerning national educational systems, based on common analysis grids and statistic production, an area in which the power of harmonization is perhaps stronger than in any other domain of international action.

Ramirez and Ventresca – who examined this process of "ideological and organizational isomorphism" (1992, p. 50) and its surprising penetration ability – also add their voice to the profuse comparative literature that deals with differences between national education systems. Noting briefly the "interesting discoveries" (Ramirez & Ventresca, 1992, p. 50) uncovered by these studies, they go on to argue that the studies ignore or underestimate the powerful supranational forces that influence national education systems and that, little by little, build up standardized systems, national educational institutions that are at the same time educational institutions of the modern global society.

For Adick (1993), this analytical view of comparative and international education presents a few advantages: it favors a long-term historical view at the macro level; it adopts a non-Eurocentric, global and comprehensive perspective; it focuses on a theoretically well-defined object, namely how to describe and explain the origins and the global expansion of the modern school structures.

Under the effects of a globalization that disorganizes everything within national states and communities, comparative education has had to face the greatest issue which concerns the validity and pertinence of comparative studies on national educational systems. The relevance of the national dimension to the comparative analysis on education, on the other hand, appears to remain unambiguous. What comes up again – seeing that the processes of national reinterpretation of the world's educational system's orientations, based on "societal coherence", persist – is not the level of the analysis but the nature of the comparative study (Green, 2007). Andy Green suggests that, in the framework of historical sociology/comparative social science, there is room for overcoming the mere quantitative

comparison between countries and the linear and paralleled connection between observable facts, as long as we move towards a “macro-casual comparative analysis” (2007, p. 81) and choose to connect the relationships and the relationship patterns that we can make out in between those observable facts.

7. *The externalization of national systems*

Externalization, which was included in the topics mentioned before, presents itself as a particular way of affirmation of the world's educational system and of construction of homogeneity in national educational systems; that is, we develop comparisons with foreign models and global situations, we mobilize international indicators and we visit other countries, hoping to capture ideas and stimuli for the development of internal policy. Through this process, political in nature, countries turn to, in Schneider's expression, a “transnational contemplation” (1931/1932, quoted by Schriewer, 1995, p. 32). This means that looking beyond one's borders into comparable countries constitutes an act of “supplementary significance absorption” (Schriewer, 1995, p.31). Externalization tends to be used as a source of additional meaning, of authority and of legitimation of national reforms, like resorting to “flags of convenience” (Steiner-Khamsi, 2002, p. 72), even if the use of these flags – “examples from abroad”, “global experiences”, “global situations” (Schriewer, 2000, p.114) – is a predominant political act during the preparation and in the early stages of education reforms, fading away later as policies are implemented. The instrumentalization of external sources of authority goes through, in fact, several levels of intensity throughout the long reform processes, but it is never absent.

This transnational contemplation does not ignore the nation state crisis (Ginsburg & Cooper, 1991; Morin, 1981; Stoer et al., 1990). Globalization has, in its various facets, underlined a crisis of legitimation within national states, mainly in the way it questions and belittles the role of national sovereignty. The economic sphere, particularly in the financial domain, is the most receptive to international dictates. As we have seen, national policies tend to be presented under the effect and increasingly by means of economic rhetoric and, in particular, of the economy's most competitive sectors. This phenomenon of depolitization of politics (Morin & Nair, 1997) tends to include the national political statements in the same global wave of economic liberalism, the general and global-reaching technology that Hübner et al. (1992) examined. Given that this wave is led within the EU by the European Commission and on a global scale by the United States of America, it is likely that externalization presents itself to a lot of countries as a necessary and unbridgeable “attitude”, besides being useful for legitimizing national policies.

Among the processes of externalization we will highlight, for its symbolic power, the one concerned with statistical production. From the 1970's onwards there has been a joint action involving the UNESCO (U), the OECD (O) and the European Union (C, for it was then called European Community) called UOC, whose main goal is to articulate themes and harmonize gathering and circulating procedures of statistical data on education. In the 1980's, following a long period of relative apathy, the OECD's INES (International Indicators of Education Systems) project brought a new strength to statistical gathering and treatment of international data on education and training. In 1994, the former joint action, now called UEO (the E comes from Eurostat), is once again boosted and international agencies carry out a review of ISCED (International Standard Classification of Education).

In the past few years, the OECD has published, through INES, extensive statistical studies, suggestively entitled *Education at a Glance*, in which we find a laborious work of comparative synthesis concerning the educational systems of the OECD countries. The impact of this publication on the public opinion in developed countries has been increasing every year: a rough inventory was carried out, for example, and found around 170 mentions in newspapers, in 17 different countries, regarding the launch of the 1996 edition of *Education at a Glance*, in Paris. Presently, the annual volume of news has increased spectacularly.

The European Union, through the Eurydice network, has also boosted the publication of statistical data on education and training, by means of the *Les chiffres clés*. It is clear that there is, in every case, a national ground work, with national cells of statistical production, linked and synchronized with these transnational units. Following this production work, we are left with two results. On the one hand, the international space becomes the most visible and it is now where national statistics are valued more and, on the other hand, as the statistical work develops and diversifies, the international harmonization of national educational systems grows. The systems tend to adapt and even to change their reality in order for it to become statistically closer and, thus, "more comparable".

Schriewer identifies the three main internal effects of externalization processes on global situations: they involve minimizing social and cultural differences by suggesting that countries move towards "reference societies" (Bendix, 1978, quoted by Schriewer, 1995, p. 31) in the international stage; they objectify the *rationale* essential to reforming policies; they neutralize the obligation of appealing to values and value-based ideologies by referencing scientific standards. The process of creating "professional schools" in Mozambique (Azevedo & Abreu, 2006) has made the continuous and stressing effect that transnational models have

on local political decision makers very clear¹². Those who look at the outside and at the center are frequently called to look at them more often and harder.

Externalizations occur in a vast thread of interconnections in the midst of the world's system, as it is defined by the institutionalists' perspective. In fact, the constant externalization towards global situations imbricates on a self-reflecting process during which the educational system confronts itself with other systems and their own self-reflection processes. We therefore witness an accumulation of relations of cross-system unlimited observation that lead to the emergence of "a web of reciprocal references which takes a life of its own, moving, reinforcing, and dynamizing the worldwide universalization of educational ideas, models, standards, and options for reform." (Schriewer, 1995, p. 33).

This web of externalization processes contributes decisively to sustain and legitimize, on a national level, symbolic actions of education reform anywhere in the world. Ginsburg and Cooper (1991) argue that a significant part of national conflicts around educational reforms lies in the conflicts triggered and explained by the world's system's external dynamic. The reforming rhetoric that we encounter in different countries at the same time and with similar contours – as is the case with despecialization and curricular integration in secondary education – constantly refers to a global contextualization, which is where crises take place and where policies to overcome them are announced.

We should also mention that, since externalization processes are uncritically constituted in relation to "reference societies", they lead peripheral countries to approach the center, made up of richer and more developed countries, whose political, economic and educational systems perform better in international comparisons. Still, the context of the relations established on an international level does not fit into such a mechanical appreciation of center and periphery. The reality of inter-states relations is much more complex and, according to warnings by institutionalists, they incorporate a multiplicity of types of relationships that bring about a broad range of influences, from domination to competition and alliance, a situation which, despite not being analyzed here, deserves a proper mention.

¹² For a deeper knowledge of the effects of the world's education system on policies and practices in Angola, see Ngaba, 2006.

Building the world's educational system

To sum up, we must conclude that the world's system can be, as we have stated, a pertinent unit for the analysis of education phenomena. According to the world-systems theory, by the end of the twentieth-century social macrostructures can only be adequately understood if we consider the global context, in which we have witnessed an increase in the number of relationships of interdependence and a shift in the way they come about (Ginsburg & Cooper, 1991; Schriewer, 1995). A country's place within the world's system conditions the effects of international economic, political, social and cultural factors both on the development and underdevelopment of the education system (Arnove, 1980).

Albert Bergesen adds that – seeing we are now far from the 1950's and the early formulations of the world system, created around the theory of dependency – the time has come for us to conceive the world system as a *sui generis* reality that emerges as a “collective reality exogenous to nations” (Bergesen, 1980, quoted by Schriewer, 1995,p.10), such as the world and the global space that Morin and Nair talk about. In this paradigm shift, Bergesen goes on to argue, the final moment will come when we invert the structure of analysis of the world system, dominated by the parts-to-whole framework, and move towards a whole-to-parts paradigm. In this case, the world system would have its own laws of movement, which in turn would determine the social, political and economic realities of national societies.

Despite not going as far as Bergesen – who suggests replacing sociology with “globology”, the science of “the collective reality of world order” (Bergesen, 1980, quoted by Schriewer, 1995, p. 11) – we believe that this final route, through the theory of the world system and through the ways in which the world's educational system builds itself and acts, constitutes a new analytical arch of greater relevance to research and action in the field of education.

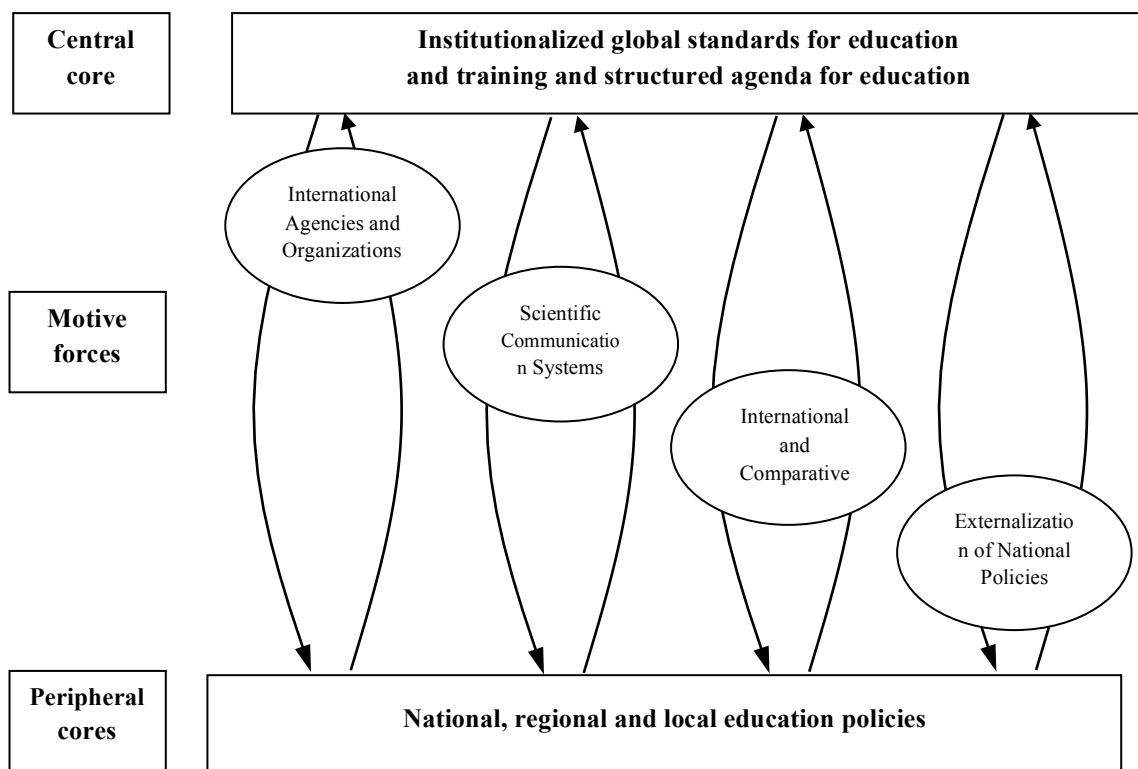
In short, the construction of the world's educational system is a historical process in which the long-term fluxes and effects necessarily prevail. This social construction is a game, largely imperceptible, but also continuous, strong and tense (this globalization is not of low intensity), in which several factors – we have highlighted seven, to which we now return as we sum up – cross each other.

Before, however, we must add that these dimensions consubstantiate the world's education system as a specific social and cultural transnational model and that various interconnections and interdependence networks are established in their midst, by the action of different feeding centers of the system, among which we underline the continuous action of international organizations, from the outside to the inside and from the top to the bottom, in isomorphic as well as

coercive ways, the scientific communication system, the international comparative education and the externalization of national systems to the world system, this time from the inside towards the outside, from the bottom to the top and from the periphery to the center.

Picture 1 tries to express some of the functioning characteristics of the world's educational system. It shows a set of dimensions and some of its interactions (mentioned throughout this text), it gives us a global perspective of the way in which it works, it identifies the decision-making centers and the system's motive forces and it explains some of the fluxes that circulate in the connecting networks between the different dimensions and between the center and the peripheries. The

Picture 1
Elements for understanding the mechanics of the world's educational system



four motive forces identified in the picture feed a continuous seesaw movement between the "imagined society" and the "structured agendas", with their attractive central power, and the diversity of real social contexts, with their peripheral tendency. As these circular movements are described as part of long-term processes, the measures of education policy – education reforms – are always drawn under the effect of a great tension between the two poles. A critical junction of rationalities, teaching and training are also crossed by the polarization of the

world's educational system, by national policies and local social contexts, with their specific games involving specific actors, inscribed in new political and economic regulations at the global level.

This framework needs investment in new research, both on theoretical and empirical perspectives, chiefly to try and discern the processes (their irregularities, their uncertainties) by which the several dimensions we have mentioned combine, order and optimize. The task is not clear nor easy, seeing that the globalization we are witnessing, and within which we are actors, this new historical process, should be seen more as a “moving whirlpool” (Morin and Nair, 1997, p. 119) than as a real global system with an organizing center. It would be worth the effort, in particular, to explore the concepts of polycentrism, of unifying matrix and erratic practices, of subjugation to the market economy mandates vs. the reinforcement of citizenship, of participation and solidarity, of the “butterfly-effect”, of decentralization- autonomy and of inequality-inclusion.

As we have seen, the most important contributions to solidifying this matrix and to disseminate it – highly interconnected processes – come from the expansion of the ideology of modernization and of the globalization of the capitalist economy, the global expansion of education models, the scientific communication system, the long-term action of international organizations, the work of technicians and international and comparative education scientists and the externalization sponsored by national political powers. The lace pattern of the world's educational system, like a spider web, is a construction: unstoppable, conflicting, continuous, silent and, paradoxically, almost imperceptible to citizens who look at it hurriedly. Dozens of international organizations, thousands of experts and education scientists work within this fabric, weaving in hundreds of magazines, books and websites, in conferences and meeting throughout the world and in permanent and long-term transnational contemplations, which move mostly from the periphery towards the center of the world system. This way the standards of education institutionalization are framed, spread and sustained by the ideologies that support them.

All this takes place as when we look up at the sky, blue and clear, and all we can see is the blue vastness. However, invisibly and strangely, the sky remains riddled with an important network of plane routes coming and going. Even if we do not see them, these routes exist and play a crucial role in regulating this continuous traffic which involves millions of people everywhere. The world's educational system appears to work in a similar fashion. When local schools and their headmasters, as well as national political leaders, look up at their firmament of models and ideologies, they find it difficult to see the work of the world's educational system. Occasionally, they even reject the notion that it exists, in the name of national and

local identity. But it will still exist and it will still work, seeing that it is also build by the hands of those that deny its action (while being fed by it) and who remain dependant of a logic of domination.

Nevertheless, we recognize that every national context witnesses a specific conflict of interests between social groups and a national “societal coherence” that should not be underestimated. This coherence is based on different historical cultures and traditions, as well as multiple relation games among national subsystems, such as companies, education and training, wage commitment and social concertation. We believe that Schriewer’s perspective – the best when it comes to working with the theory of the world system –, which refers to the national reinterpretation and further elaboration of the world’s educational system’s “guidelines”, based on national interdependency between specific national standards, is the best at noticing the singular historicity of the divergence that occurs in the midst of a process of growing homogenization. According to Cantor (1989), in the conclusions of his international study about training and vocational education systems, the most obvious and pertinent aspect worth mentioning is the way in which each system faithfully reflects the characteristics of the society it is a part of.

Thus, we witness at the same time the proliferation of a transnational rhetoric and its virtuosity, namely around the emergence of the “knowledge-based economy”, the new technologies of information and communication, the new production system, the post-Fordist and flexible production system – a voluntaristic discourse, optimistic and concomitant with a time of restructuring of the capitalist economy, of fragmentation of cultural references and of growth in social inequalities –, and the preservation of a great number of contradictions, conflicts and regulation methods, which are different in every country and which draw out attention towards the need not to trade the aspiration and transnational scenario for the concrete reality of social relationships of a given territory, which appeal to a redoubled attention in light of the perverse effects which result from the fact that we sometimes take as fundamental referents statistical simplifications, excessively lyophilized and too removed from the thickness of local social fabrics. The international ideological convergence that we have explored as well as its consequences at the national educational level share a place in the significantly diverse everyday lives and local social territories, from the segmented labour markers and differentiated production systems to the school systems with dissimilar organizational foundations, diverse methods of regulating the connection between school-work-employment and several types of social representations and social and professional expectations.

Considering all we have stated so far, it is inevitable that we also refer to the permanent tension between the centripetal and homogenizing force of globalization and the centrifugal force of preservation of local and national diversity, glocalization, which includes this interpenetration of universalizing and particularizing tendencies (Robertson, 1998). As the world system conceives and organizes the diffusion of models as virtuous social systems (Strang & Meyer, 1993), shaping national education reforms according to a hierarchy that runs from the center towards the periphery of the world system, the local or national system elites set off the processes of reception and organize their own appropriation of these models. It is certain, however, that the power and legitimacy of these elites are amplified by the use of general rhetoric and global standardized models, expressed by “global elites”¹³, which frequently lead to a silent consensus at the national level in face of its science-like virtuosity.

The degree of global standardization that has been reached in reform discourses, in political measures and, to a certain extent, in organizational structures is such that “there is perhaps no other area of public policy, not even the economy or social and environmental policies” (Schriewer, 1995, p. 15), in which the process of internationalization and globalization has gone this far. Education systems and educational research are, still according to Schriewer, components of this process which is “particularly susceptible to the growing dynamics of internationalization” (Schriewer, 1995, p. 15). It is therefore important to determine the point from which to look at national and local diversity: from a local standpoint, from a national angle or from a global perspective.

In addition, we will still have to examine the effects of globalization on the evolution of national education systems, whether they are the result of the continuous loss of the national state referent, of the growing need for a legitimizing rhetoric, arising from the global space, or of the feeling, seldom explicitly shared, that politicians, for want of orientation and resources to solve national and local problems, prefer to set off education reform processes packed with tensions

¹³ For some authors, the “global elite” is characterized by mobility, by its power and by the fact that it is not tied to a territory or space (Bauman, 2001, 2002a, 2002b, 2003a, but also Featherstone, 2006; Lawn & Lingard, 2002, Rizvi, 2004). In Bauman’s work, this elite gains other epithets: “new” (2003a, p. 66), “flying”, “wanderers” (2003a, p. 134). It is interesting to note that, according to a “Study of Cultural Globalization” carried out at the Institute for Advanced Studies in Culture at the University of Virginia, the “globalizers” “inhabit a socio-cultural bubble that is insulated from the harsher differences between national cultures” (quoted in Bauman, 2003a). In any case, Bauman goes on to add, this elite “prefers to call itself, flatteringly, multicultural” (Bauman, 2003b, p. 18). As we have argued before “this affirmation of multiculturalism [often constitutes] a mere device to express the indifference towards what is different, through the loss of important cultural references or, at least, the loss of centrality of important social and political narratives, through the growth of individualization and consumption, as if it were the hottest current refuge for exercising social participation” (Azevedo & Fonseca, 2007, p. 19). Finally, Lawn and Lingard describe this elite “as a new magistrature of influence” [the expression first appeared in Alves and Canário, 2002] in the field of education policies in Europe: a political elite which operates beyond borders, reveals similar habits, leans towards the same political game and, in a sense, promotes an emergent European education policy” (Lawn & Lingard, 2002, p. 292).

between the global and the local. In any case, and going back to the blue sky metaphor, is it likely hard for anyone to obtain detailed descriptions and profound confessions by national governments and national social actors about their attitudes of international and global “contemplation” and the benefits they derive from it.

Finally, it will be important to reflect, in the future, on a major issue, which results from what we have just mentioned concerning the centripetal and centrifugal movements and glocalization, which has to do with knowing if the abyss of the restructuration of capitalist economy – namely through their most unequal neoliberal manifestations, depersonalized and cruel to the humanity of individuals – is not in fact occupying almost every referent and social mandate in which the present and the future of education system and schooling, in every school, local community and national state, is being analyzed.

Reconsidering regulation in education

At this point one might also conclude that it is important that we rethink transnational, national and local dimensions in education. What is the place and function of nation-states in this new framework? And the same question ought to be asked regarding the local. Is the “city as a learning community” for all, in life and throughout life (Azevedo, 2007a), the horizon of reflection that we have been suggesting, a mere illusion? Is it possible to review social analysis in education, this time integrating in a new way the tensions between the three levels of regulation, the global, the national and the local? Will the methods of governing education ever be the same? And, if not, what are the new paths available, what are the opportunities and the risks?

Our proposal includes always considering, in the social analysis of education, the multiple connections between the three levels of regulation. After all that we have stated concerning the world's education system, it is now important to enhance that national states still play a crucial role – we are always national citizens of the world – as spaces and times for exercising citizenship.

Redefining the role of the state has been part of many countries' political agenda. There are hurried discourses, within the neoliberal mainstream, that argue that, in a context of deregulation and deterritorialization (Ferreira, 2006) the state should limit itself to the role of the evaluator, after many decades of playing the educator. Nonetheless, in the current process of re-composition and interpenetration of times, places and functions of the local, national and global spheres, we ought to bear in mind, even if just for a minute, four arguments that highlight the role of national states and social citizenship.

Firstly, the nation-state is still a major instance of real exercise of individual citizenship and social participation. Secondly, the nation-state still holds a good share of the “monopoly of legitimacy” (Ferreira, 2006, p. 23) over the definition of the public policies that it carries out, by itself or in partnership with other social actors. Thirdly, it is the nation-state's job, as we have mentioned frequently, to deal with the complex reinterpretation of the “mandates” and international and global orientations. Fourthly, the nation-state still plays an important role as regulator (encouraging, following up and evaluating, correcting asymmetries...) in face of the dynamics, projects and powers which arise from various instances and local, social and community initiatives.

Yet, in order for us to analyze regulation in education in all its complexity in a modern democratic state it will not be enough to consider (besides transnational regulation) national regulation, that is, the way in which the states conduct their

public education policies, or, in a wider sense, the set of actions and adjustments that seek to balance the education system, a goal reached through coordination, control, assessment and amendment actions, predominantly bureaucratic and administrative (Barroso, 2006). We must consider at the same time the local sociocommunitarian regulation in order to include both the complexity of institutions and initiatives, strategies, interest games and the social actors' desire to cooperate and the participation of each citizen.

In Portugal, a country with a strong centralist and bureaucratic tradition as matrix from the state's action (Lima, 2006), there is a tendency to overdetermine – when it comes to planning political action and social change and to promoting educational common good – the state's normative and hyper-regulating intervention, underestimating the action of local social actors (or valuing it only as a place where central administration's norms are fulfilled). This model of pre-regulation of the educational public good has reigned in Portugal since the eighteenth century.

Local regulation – as a process of articulating and coordinating the action of different social actors in every local community, which results from the (re)cognitions, interactions, conflicts and compromises between different interests, rationalities and strategies of social actors – could also be described as sociocommunitarian regulation. The conjugation of these two terms aims to reflect the existence, in each territory, of, on one hand, the society – the instituted organizations, with their rationalities, their calculations and their own goals, interests and actions – and, on the other hand, the community, that is, on one hand, the common memory, the sense of belonging and of common identities and interests and, on the other, of the bridges that we build between those institutions and people.

The point of attraction and convergence between the two sides can be the search for, the establishment and the construction of superior interests and common goods for the communities, properly shared and chartered, in the service of each citizen's education throughout life and with it.

This regulation mode, systemically complementing and interacting with both the action of the “world's educational system” and the national state's regulating action, becomes crucial during processes of social change, to the extent that it is the only one that takes into account the local game of actors, the huge variety of situations in life and exercises of citizenship, the concrete social situations, in particular ones to do with inequality and injustice, as well as the dynamics of articulation and territorial proximity (horizontal perspective) and the conditions for setting in motion the political measures created and launched by the central or regional administrations (vertical perspective) (Azevedo, 2000, 2002; Barroso,

2006). These local social dynamics, as we all know, can jeopardize and even render those global and state policies unfeasible, if they are not properly examined during the strategic planning of education development.

In the field of education in particular, (in the open and anthropological perspective we have adopted [Azevedo, 2007a]), which comprehends the learning conditions of every citizen, throughout life and with life), if we focus on state regulation and disregard sociocommunitarian regulation we will be running the risk of forgetting about real people (especially those at a greater risk), of neglecting the creation of bonds and of a sense of community between people, of managing action through “catalogues” and norms that exclude, from the outset, the very same they are looking to include, of compromising individual freedom and the efficacy and efficiency of policies. This happens because it is, to a great extent, the local actors and their ability to rally people that carry out (or fail to) the local social demand for education and that can follow, assess and control (at a primary level) the quality of any educational offer and demand and the common and personal goods generated. We know that personalized welcoming practices – of constant proximity, permanent guidance, investment in social citizenship and in the social and professional integration of every citizen, the ones born there, the ones passing through and the “foreigners” – make a difference in education, in every school, training or local learning centers.

Cities are nowadays the rivers through which the exercise of social citizenship runs and “educating cities” are already expressing this central preoccupation with hospitality and promotion of each citizen’s civic participation, favoring permanent learning dynamics involving everyone.

Local processes of sociocommunitarian regulation, side by side with the heterogeneity of territories, are very complex and, in general, unpredictable. They coexist with a multiplicity of possible (and unpredictable) connections between institutions and cultures, interest groups and individual actors. This multiform and, in general, flexible and poorly articulated connectivity is the expression of small networks whose action is fundamental in the context of conflict of interests, mutual aid, citizen mobilization in favor of the educational common good (parents, families, youngsters, teachers, municipalities, companies, associations, museums, health centers, libraries, foundations, etc.)¹⁴. Nowadays, these networks are an essential branch of social policies and they express and nurture the potential for interaction and solidarity that exists in every community. The participation of the actors and the autonomous, local, sociocommunitarian, formal (for example, the Municipal Education Council) and informal (cooperation networks and common

¹⁴ The *TCA-Trofa Comunidade de Aprendentes* [Trofa Community of Learners] project is filled with examples of these sociocommunitarian regulation characteristics. (cf. www.trofatca.pt)

projects between institutions, among others) regulation constitute, in our view, one of the pillars for the improvement in the quality of education, in line with international and national political orientations and the regulating intervention of the national state¹⁵.

If we wanted to focus this meditation on school contexts, we could broaden and deepen the range of new questions that arise around, for example, the repercussions (impacts and retroactions), for each school and classroom, of the massive circulation of the PISA results¹⁶, of the creation of the Europass, the introduction of the Bologna Process and of the standards and guidelines of the European Association for Quality Assurance in Higher Education (Azevedo, 2007b). Schools are in fact “polyphonic organizations” (Estêvão, 2003) where several local and national voices meet international ones, inextricably connected and often contradictory, which generate profound crisis of institutional meaning.

The historical situation in Portugal configures a very special framework from which to examine this issue. In face of a uniformizing state, which destroys the autonomy it has decreed¹⁷, the sociocommunitarian regulation of education could be a path towards the reinforcement of civic participation, citizenship and intercultural welcoming, towards improvements in the quality of education for all, towards closing the gap between the demand for education and the satisfaction of each and every one's needs, in a continuous articulation between the local and the global.

We do not know what the future will bring, but are we not facing a scenario where, despite the importance of national states, the dynamics of articulation between the local and the global will increase and become more autonomous, because national policies often lose coherence, consistency and legitimacy, by drifting with the tide, and because schools and local actors will have an easier and more direct access to the same external and global sources of legitimacy, inspiration and action? If this is true, what consequences will the equality in social opportunities and democracies derive from this tendency?

Moreover, following the social and political devaluation of education/learning in the home-family, in the churches and in the working communities and after its exclusivist link to the state, which chooses to follow abstract principles and collectivistic ends, will not the return to individual and social citizenship, to welcoming others, particularly the most fragile, and to sociocommunitarian

¹⁵ The issue lies beyond the scope of this essay, but it is obviously important that we re-examine the role of the state in promoting educational public good, in light of the adoption of this perspective of inevitable articulation between multiple processes of regulation.

¹⁶ Cf. <http://www.pisa.oecd.org>.

¹⁷ João Barroso goes as far as arguing that school autonomy is “a political fiction” among us (Barroso, 2004, 2005, 2006).

regulation imply a re-institutionalization of the local social institutions such as the education/learning homes, with their own pedagogical design, always available and accessible to all, throughout life and in life, in strong intergenerational and intercultural bonds?

Between the excessive weight of the world's educational system and the growing individualization of "dissocialized" (Touraine, 1997) citizens, what is now the place of the national state, of decentralization (Carnoy, 1999) and of sociocommunitarian regulation of education? If the national state and the local institutions do not place political intervention and the education of every citizen at the center of their development priorities, will societies be able to follow a path other than the one towards the increase in social inequalities at international and national levels, towards social exclusion and citizen-participation-through-consumption, to the sound of the music from the great structured agenda of the "knowledge-based economy"?

On the other hand, is the "school crisis" – nowadays proclaimed so loudly in the local context, in face of many and complex and even contradictory societal mandates that weigh upon it (Nóvoa, 2006), which also reflects an escape from the real day-to-day problems that we must face – not working as a powerful instrument of its own subjugation to the world's educational system, backing away or even running away from the concrete pressures of local actors and of the extremely frail situations in which so many citizens find themselves in, by invoking, for example, global "structural" agendas (of economic nature) in order to avoid facing local problems (with a human face)?

In this framework of difficult articulation between different and important levels of education regulation (transnational, national and sociocommunitarian) and in which the action of these different levels is in a process of accelerated re-composition, we undeniably find ourselves before scenarios of socio-educational conception and action which are very difficult to predict and design, contingent, necessarily supported by political humility and a precious and careful strategic management, by hope, by continuous reflexivity and citizen participation and, because of that, "doomed" to go through permanent revision.

The development and improvement of education have a clear opportunity to follow new paths. The question that remains is how to escape the economicist mandates and the technical, functionalist and collectivist referential that have guided national education reforms for the past decades, in a framework marked by a greater presence of the world's educational system, hesitancy, a crisis of national states' legitimacy and low levels of local civic participation.

Social development, whose main pillars are human development and solidarity, is demanding social innovation and sustainability, strategic points that can only be developed in a new framework, characterized by meetings, interaction and co-accountability, involving citizens and local institutions, national states and international organizations. Overcoming the crisis of democracies and fighting for a greater social equality will possibly depend on persistent innovation in social development efforts.

A return to politics – to the public arena, public debate and civic participation – may be decisive for formulating education policies, pulling them away from technical constraints (the only things that appear to be under discussion are technical solutions, as if the – global – political agenda were defined and established!) and the guidance of “external”, and almost exclusively economic and entrepreneurial, mandates. Education policy should be, above all, this political and citizen participation, the freedom and responsibility of social actors in each community, the real construction of justice and democracy, the continuous creation of social capital and a new ability to answer the great and beautiful challenge of learning and personal fulfillment for all¹⁸, throughout life, in life and with life, always under the light of solidarity, “looking for a greater human proximity” and the citizen’s sovereignty (Baptista, 2007).

Nowadays, when (only) a fourth of the world’s population is in school, we stand before situations and scenarios that demand hope, determined and long-term action, a lot of freedom, innovation and a great ability to open up to social complexity, sustained by a positive outlook regarding the other, each “other” (which is always another kind of freedom, according to the Levinasian notion), because only this anthropological vision will account for the inalienable human ability to search for perfectibility and educationability, regardless of the person’s situation.

To sum up, the notion of “thinking globally, acting locally” is no longer viable. That paradigm has been replaced. We must now focus on thinking globally and acting globally, thinking locally and acting locally, thinking and acting globally, without missing the reference to proximity, without losing sight of those who look us in the eye. On the one hand, the city and the exercise of citizenship, education for all, in life and throughout life, hospitality as a permanent social practice within the city are more fruitful practices and concepts, that we must look into carefully, when it comes to thinking and acting both locally and globally. On the other hand, if universal human rights are now often called solidarity rights, which is a crucial point in education, and if they are implemented at local as well as a global scale, we

¹⁸ This text’s supreme irony: after several important contributions by the UNESCO, the OECD had a defining role, during the 1990’s, when it came to inscribing “lifelong learning” in the political agendas of its member states (Jakobi, 2007; Jakobi & Martens, 2007.)

will not be able to walk anywhere other than towards the democratization of international organizations and global institutions.