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# The instrumentation of global education reforms: an analysis of school autonomy with accountability policies in Spanish education

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## ABSTRACT

This paper analyses, from the perspective of the political sociology of policy instruments, the adoption and re-contextualisation of School Autonomy with Accountability (SAWA) reforms in Spain, with a particular focus on the region of Madrid. Over the last few decades, Madrid has adopted a wide range of education policies that have contributed to consolidate a market-oriented approach in the governance of the educational system. This paper analyses the instrumentation and complex interaction between standardised tests, test-based accountability, school choice and school autonomy in advancing this governance shift. The main objective of the paper is twofold: first, to trace the policy trajectory of SAWA reforms in Spain and Madrid, and second, to identify the rationale of the reform and its related policy ontology in relation to the selection and articulation of different policy instruments as well as the governance implications of these choices. Methodologically, we have conducted a policy analysis case study, analysing data from a set of 35 original interviews with education policymakers and key policy actors, combined with document analysis. The results of our research show how the policy preferences of domestic political actors and the legacies of the politico-administrative regimes mediate the final form and uses of the SAWA policy instruments. These policy instruments can be conceptualised as ‘life objects’ whose development and uses are attached to context specific – and sometimes contradictory – political objectives and rationales.

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## Introduction

The process of globalisation in the fields of policy, economy and culture has resulted in profound changes in the education sector. The emergence of supranational actors promoting education reforms and the consolidation of multi-scalar interdependence in governance activities has indicated that education policy and education reform is no longer – exclusively – a matter of nation-states. Non-state actors are increasingly involved in the design and dissemination of policy ideas, instruments and tools, which travel in transnational spaces and change throughout their journeys (Peck & Theodore, 2010).

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Dynamics of policy “borrowing” and “lending” take place, resulting in specific forms of “reception” and “translation” of global policies in national contexts and their related policy spaces (Steiner-Khamsi, 2004, 2014). In this context, education reform paradigms, such as the so-called Global Education Reform Movement (GERM) (Fuller & Stevenson, 2019; Sahlberg, 2016) or School Autonomy with Accountability (SAWA) policies, have spread and *moved* across countries.

SAWA policies are good examples of ongoing globalising policy dynamics in the education sector, becoming common policy solutions, aimed at addressing many problems that education systems and countries face around the world. According to the OECD (OECD, 2010) “many school systems have moved away from a model of purely administrative control towards one where schools become more autonomous organisations, accountable to their users and to the public for outcomes” (p. 105). Governments are adopting SAWA reforms to allow educational actors, such as school principals and teachers, to take decisions in matters of educational provision and instruction and at the same time, these educational actors are made accountable, in order to ensure the quality and efficiency of their decisions, usually in terms of educational performance. To achieve these performative intentions, SAWA tends to be adopted together with learning standards and more prescribed curricula (Sahlberg, 2011). International Organisations are promoting the use of these kinds of instruments in order to improve education results and raise standards in the quality of education. The OECD is playing a key role in the dissemination of these policies, especially through the consolidation of PISA, which has become an influential policy tool with great impact at a national level. Sellar and Lingard (2014) argue that the OECD is gaining influence in a global education policy field, by generating a sort of “epistemological governance” and “unfolding the scope, scale and explanatory power of PISA” (p. 931). Other authors outline how PISA is becoming an indirect policy tool to govern education systems by numbers on a national and international scale (Grek, 2009). Indeed, in numerous countries, PISA is “being used and integrated within national/federal policies and practices of assessment and evaluation, curriculum standards and performance targets” (Breakspear, 2012, p. 27).

SAWA reforms are broadly informed by New Public Management principles and accordingly, promote (i) higher levels of competition among schools; (ii) an increasing process of education standardisation, as well as a focus on “core subjects”; (iii) the emulation of private sector management models and (iv) the implementation of test-based accountability measures (Sahlberg, 2016, p. 138). Verger, Parcerisa et al. (2019) point out that standards, decentralisation and accountability are core components of ongoing global education reforms. These principles are articulated with the use of national large-scale assessments, which are increasingly adopted in a wide range of settings, as a means of exerting performative and accountability pressure on school actors (Allan & Artiles, 2016; Verger, Parcerisa et al., 2019).

Test-based accountability (TBA) is currently the predominant model of accountability<sup>1</sup> (Lingard & Lewis, 2016; Smith, 2016; Thrupp, 2018) grounded on the assumption that education systems could be evaluated and held accountable on the basis of the assessment of students’ results in external and standardised national tests (Hamilton et al., 2002). Thus, TBA is assumed to be an external policy instrument to monitor and improve education quality and performance. TBA can also contribute to promoting market dynamics in education (Harris & Herrington, 2006; Maroy & Voisin, 2017), for example,

with the publication of school performance results as a means of providing information to parents, to exert school choice (West et al., 2011).

Despite such global status, SAWA reforms are not monolithic and are adapted and re-configured differently, according to educational realities. The implementation and re-contextualisation of SAWA is not univocal; it rather presents “very diverse policy configurations in different settings” (Verger & Normand, 2015, p. 603), according to political, economic and cultural contingencies (Gunter et al., 2016).

Due to the diversity of school autonomy and accountability policy instruments in terms of design, implementation and evolution, more research on the *instrumentation* of these policies is required. This policy instrumentation approach focuses on understanding why and how policy instruments, such as national assessments and accountability are selected and how their uses evolve or even deviate from their initially intended uses (Verger, Fontdevila et al., 2019). The article aims to develop this research strand by focusing on the adoption and re-contextualisation of SAWA reforms in Spanish education, with a focus on the region of Madrid, where these reforms were explicitly articulated with pro-school choice policies. The study of educational reform in Madrid is relevant for two main reasons. Firstly, Madrilenian education reform is a paradigmatic example of a market-oriented SAWA model, based on pro-school choice policies and accountability mechanisms (Verger et al., 2020), under the assumption that “school choice combined with external performance standards measured by standardised tests, leads to better learning for all” (Sahlberg, 2016, p. 137). Secondly, Madrid is an exception in the context of Spanish education, traditionally more reluctant to carry out market-based accountability reforms. In fact, Spain could be classified as part of the so-called Napoleonic administrative tradition, which is characterised by hierarchical, uniform bureaucracies and public services that are reluctant to be ruled according to performance criteria (Ongaro, 2010; Pollitt, 2007; Verger, Fontdevila et al., 2019). Therefore, this paper aims to understand the circumstances that make Madrid partially deviate from the public administration model that predominates in Spain and to a greater extent in the South of Europe.

The main objectives of the paper are (i) to trace the policy trajectory of SAWA reforms in Spain and Madrid and (ii) to identify the policy rationale<sup>2</sup> of the reform and its related policy ontology, in relation to the selection and articulation of different accountability policy instruments, as well as the governance implications of these choices.

To address these issues, the paper is organised into five main sections. The first section includes the theoretical and analytical approach of the study, which is based on a political sociology approach to policy instruments. In the second section, we present the methodological strategy of the research, which is followed by a contextualisation of our case study. The main results of the study are presented in the fourth section of the paper in relation to the different aspects: (i) the main factors behind policy change; (ii) the process of policy instrumentation and the rationale behind it and (iii) the partial retention and consolidation of the policy changes introduced. The final section discusses the results provided and outlines the main conclusions of our case study.

### **Analytical approach: a political sociology of policy instruments**

A political sociology perspective focuses on analysing the ways in which power is exerted, developed and contested by different actors with divergent or contingent interests in

a given policy context. Max Weber's contributions to power and legitimacy represent a point of departure from this perspective, outlining the rational-legal forms of legitimacy as the main source of power in capitalists' societies and problematising "public policy instruments as a technique for domination" (Le Galès, 2011, p. 147). The shift from government to governance, the rise of new policy actors and the changing nature of the state and its governing activities, renewed interest in "how governance is operationalised" (p. 142) through specific tools, devices and policy techniques which constitute *policy instruments*.

A classical functionalist perspective on the analysis of public policies tends to focus on the effectiveness of policy instruments, in order to identify "what works" and "best practices" to address policy problems. From this functionalist approach, the policy process follows a rational orientation in which policymakers and other policy actors choose those instruments which better address the problems to be solved. This rationalistic perspective assumes policies and policy instruments to be "neutral" and "natural" in the sense that they are conceptualised as mere "technical devices", which precede those who implement and develop them and hence are "at [the] disposal" of experts, technicians and policy makers to address and solve a wide range of policy problems (Lascoumes & Le Galès, 2007, p. 3). On the contrary, a political sociology perspective of policy instruments suggests that we need to problematise the choice, design and effects of policy instruments. According to this perspective, we can define public policy instruments as:

a device that is both technical and social, that organises specific social relations between the state and those it is addressed to, according to the representations and meanings it carries. It is a particular type of institution, a technical device with the generic purpose of carrying a concrete concept of the politics/society relationship and sustained by a concept of regulation. (Lascoumes & Le Galès, 2007, p. 4)

Hence, policy instruments are defined as institutions in the sociological sense, because they define a set of rules, expectations and regulations, as well as orient the behaviour and the action of agents. Policy instruments are developed by actors with specific governing purposes and hence "constitute a condensed form of knowledge about social control and the ways of exercising it" (Le Galès, 2011, p. 151). The aims and designs of policy instruments generate second order and unintended effects, which is the reason why policy instruments are conceptualised as living objects, as they tend to increasingly gain autonomy from their initial intended objectives and generate new uses and practices. Therefore, policy instruments "have impacts on their own, independent from the policy goals" (Le Galès, 2011, p. 151). Such unintended effects tend to privilege some actors and behaviours over others, and are the reason why policy instruments cannot be conceptualised as mere technical, flat and neutral devices but as socially constructed policy technologies that define certain "forms of power" (Kassim & Le Galès, 2010, p. 5). Hence, the policy instruments approach aims to understand how specific forms of government work as policy technologies, to define the agents' behaviours and relationships among actors, with unequal distributions of knowledge and power.

A political sociology of policy instruments is mainly concerned with problematising the choices of a given set of policy instruments in order to understand how and why certain policy tools are privileged above others, under what rationales, purposes and motivations as well as the evolving uses and effects of such instruments. This process, known as *policy instrumentation*, "involves not only understanding the reasons that drive towards

retaining one instrument rather than another, but also envisaging the effects produced by these choices” (Lascoumes & Le Galès, 2007, p. 4).

The analysis of policy instrumentation is combined in this paper with a Cultural Political Economy (CPE) perspective to disentangle how ideational and material factors are inter-related in the conformation of specific institutional change in the cultural, political and economic domains, through the evolutionary mechanisms of variation, selection and retention (Jessop, 2010).

Recent research has addressed the global spread of data-intensive policy instruments in the governance of education systems, with the introduction of national large-scale assessments and test-based accountability mechanisms, based on the performance of students in external and standardised national tests (Maroy & Pons, 2019; Verger, Fontdevila et al., 2019). These policy instruments also include other governance related education policies including decentralisation and school autonomy, accountability mechanisms and prescribed learning standards (Sahlberg, 2016; Verger, Parcerisa et al., 2019). However, the motivations, trajectories and sedimentation of these instruments seem to be related to the politico-administrative legacies of states (Verger, Fontdevila et al., 2019). In this article, we aim to problematise the process of education reform in Madrid, combining an analysis of the policy instrumentation with the CPE, in order to understand the re-contextualisation of SAWA policies.

## Methodological strategy

Methodologically speaking, our research is informed by Stephen Ball’s policy sociology approach to policy trajectories and, specifically, by his more recent work on network ethnography. Ball’s work does not only encourage us to understand the global hegemony acquired by certain policy solutions but also to ‘follow’ the trajectory of these policy solutions and understand the bricolage dynamics involved in their local re-contextualisation (Ball, 1998; Ball et al., 2017). Inspired by these accounts, in this study, we trace the political rationales and the ideational sources behind the education reforms carried out in Madrid in the last two decades, in order to understand which components of the SAWA global model have been selected and retained, and how they have been transformed over time.

The data collected combines primary and secondary data, based on semi-structured interviews with policy actors and key stakeholders (n = 35) and document analysis (n = 12). Regarding the interviews, the selection of participants was based on theoretical and qualitative criteria, according to the importance of the actors involved in the policy process. We selected participants according to their expertise and experience regarding the reform process. Moreover, a snowball sampling strategy was adopted in order to enrich the sample of participants and avoid selection bias. The final sample of participants included key informants of a different nature as specified in [Table 1](#):

**Table 1.** Interviews and key informants.

Type of Key Informants	Number of Interviews
Experts/Academics	5
Educational Stakeholders	11
Teachers’ Unions	3
Government Advisory Committee	3
Policymakers	8
Top-level Politicians	5

The data collection was guided through a semi-structured interview script, aimed at encompassing different dimensions which included (i) individual background; (ii) main aspects of the policy formation process; (iii) subjective opinions and perceptions and (iv) different actors' roles, sources of information and policy inspirations (Fontdevila, 2019). The interviews were complemented with document analysis of key education legislation from Madrid, related to school autonomy, standardised tests and school choice ( $n = 5$ ) and parliamentary debates, focusing on the policy instruments analysed ( $n = 3$ ). Other complementary documents were selected, due to the uniqueness of their content, including a press release ( $n = 1$ ), as well as public hearings and reports from the Madrilenian Education Administration ( $n = 4$ ).

The analysis was conducted with specialised software of qualitative data analysis using memos, emerging codes and previously defined analytical codes as the main data analysis instrument. Some of the data collected were used to inform researchers on contextual and policy conjunctures, while other data provided more in-depth information about the policy process. Due to the considerable amount of textual data, only the most paradigmatic citations were selected to illustrate the main findings of the research.

## The context of Spanish education

In this section, we present the most relevant features of the education system in Spain, regarding our research objectives. The Spanish education system is characterised by important levels of decentralisation in education. Since the approval of the Constitution in 1978, a process of political decentralisation began giving political status to regional level institutions, defining 17 Autonomous Communities. This decentralisation process followed a political and territorial rationale and was not adopted for public administration reform motivations or NPM convictions. In the education sector, decentralisation has implied a division of competences in which the state-central powers define the structure of the education system and its basic principles, as well as the general content of the curricula, whereas the Autonomous Communities focus on the regulation of educational provision and school governance.

Another important feature of the Spanish education system is the strong and historical presence of publicly funded private schools, which convert this system into a paradigmatic case of the so-called Historical Public–Private Partnership (PPP) (Verger et al., 2016). This model of education provision implies the coexistence of two different networks of schooling, one public, in terms of funding and management; the other publicly funded but privately managed, mostly by religious Catholic institutions,<sup>3</sup> and with specific regulatory features particularly relevant in terms of school autonomy.<sup>4</sup> This model, together with the practices of students' selection (Benito & González, 2007) and the exit of middle-class families from certain public schools, has generated high levels of school segregation, which is especially relevant in urban areas, such as Madrid (Bonal & Zancajo, 2018).

The politicisation of the educational debate in Spain is highly polarised and has its contemporary roots in the 1980s when the democratic transition coincided with a period of educational expansion and the configuration of a new, post-dictatorship education system. In this period, different interest groups emerged to advance their preferences, highlighting

two major perspectives, the conservative and the progressive (Bonal, 2000). The former defended freedom in education and was represented at that time by the political precedents of the Popular Party; the latter upheld equity and was enacted by the Spanish Social-Democratic Party. Social-democratic laws enacted in the 1980s and 1990s at national level prioritised issues of equity and participation in education, defining the grounds of the comprehensive school and establishing school councils as bodies of representation, decision-making and participation for families, teachers and students. On the other hand, the most recent laws approved by the Popular Party have developed measures focusing on two different political perspectives: *neoliberal*, such as parents' choice, school competition, deregulation and privatisation; and *neoconservative*, advocating a 'back to basics' curriculum model, accountability, standardisation and promotion of Catholic schools (Puelles Benítez, 2016; Viñao, 2016). This dual policy of the Spanish Popular Party, with its many analogies with the English New Right (Puelles Benítez, 2005), characterises both Spanish and Madrilenian educational policies, with constant tension in the implementation of neoliberal and neo-conservative policies, as our research will indicate.

Interestingly, school autonomy, despite not being central to Spanish education legislation traditionally, is progressively gaining in importance (Bolívar, 2006; Prieto & Villamor, 2018; Verger et al., 2020). SAWA policies are becoming more common among both the Left and the Right in Spanish education, even though the classic political dualism remains in its different interpretations and implementations. The social-democratic approach to SAWA policies consisted of an ambiguous definition of pedagogical school autonomy, combined with the introduction of external tests for diagnosis purposes. By contrast, the conservative reforms had intended to implement school autonomy with curricular specialisation, diversification strategies, higher stakes accountability mechanisms and common core standards. However, despite various attempts, the conservative approach to SAWA policies has not been consolidated at the national level.

Within this political and regulative context, the region of Madrid began formulating education legislation in the decade following the year 2000, when educational competences were transferred to the regional administration, governed by the Popular Party since 1995. In the next section, we will elucidate how this process evolved and the rationale behind the selection and development of different policy instruments, associated with the SAWA reform of the regional educational system.

## **The instrumentation and evolution of SAWA reforms in Madrid**

In this section, we present the main results of our research. We analyse various factors that contributed to policy change, the policy instrumentation and the evolution of policy instruments implemented in the Madrilenian education system.

### ***Variation factors and key policy changes***

In the early 2000s, three key events enabled the education authorities to initiate a deep governance reform in the Madrilenian educational system. Firstly, in 2000 culminated the process of educational decentralisation in Spain, which opened a window of opportunity for education policy reforms at regional levels. Secondly, in 2001, the first PISA results were published and were used instrumentally by political authorities as an opportunity for



policy change, given that the results were somewhat disappointing by comparison with international standards. Thirdly, in 2002, a new conservative reform, the Quality Education Law (LOCE) was enacted at a national level. The legal framework of this national reform was used to develop some of the most polemic education measures in Madrid, such as the publication of the external standardised test results. In 2003, Esperanza Aguirre, leader of the regional Popular Party became the President of Madrid. During the three terms that she would spend in office, her government would advance an educational reform, based on a combination of TBA, school autonomy and School Choice policies.

In terms of policy trajectory, we identify two different periods which promoted SAWA reforms and accountability mechanisms, with different policy approaches. A critical point of departure is identified in 2005, when TBA was introduced through the implementation of an external test, the so-called Basic Knowledge and Skills Test (the Spanish acronym for which is CDI). The CDI was designed as an external, standardised and census-based evaluation, having been implemented in the 6th Grade of primary education since 2005 and in the 3rd grade of secondary education since 2008. The transparency of the test results in different formats and the publication of a school ranking during the first period of the reform developed a model of high stakes accountability, generating great opposition amongst teachers' unions, pedagogic associations and families (Verger et al., 2020). Together with the introduction of TBA, a 'back to basics' curriculum model was enacted through the introduction of the Fundamental Knowledge and Skills Standards for Spanish Language and Mathematics "aimed, in a very significant manner, to improve the results of external evaluations" (Policy Document 4).<sup>5</sup>

During the second period of education reform, from 2007 to 2015, TBA was complemented with the introduction of other school measures and policy instruments that contributed to the enhancement of school competition. In this case, the CDI test was operated in tandem with the introduction of new policies and instruments of school choice and school autonomy. During this period we witnessed the development of another component of the SAWA agenda in the context of Madrid, when the focus of education reform shifted from education standardisation and control over the curricula, to a new emphasis on school choice. The policy instrumentation and the rationales for the selection of different policy instruments implemented during this process of education reform are analysed below.

### ***The construction of an educational policy problem***

The implementation of the standardised test was founded on a basic assumption, which presumed a problem of education quality due to the low levels of student performance in terms of basic skills and essential knowledge. This "problem" had already been denounced by a group of policy makers and intellectuals, grouped under the *Foundation for Social Studies and Analysis*, a salient Spanish think tank advocating neo-liberal education reforms (Olmedo & Grau, 2013; Saura, 2015). The Foundation is still chaired by Jose María Aznar, outstanding member of the Popular Party and President of Spain between 1996 and 2004, the period in which the conservative education reform (LOCE) was enacted and in which Aguirre acted as Minister of Education at national level before becoming President of Madrid. Various members of the Foundation argued that the comprehensive education system, developed by the Spanish Social-Democratic Party

since 1990, had undermined the quality of the education system by imposing the principle of equality. The Foundation also advocated the need to regain the conservative principles of effort, merit, discipline and authority in order to restore students' commitment to learning (Delibes, 2008). Most of those advocates were based in Madrid and served in different positions of the national and the regional governments when the Popular Party was in office, allowing for continuity between national and regional policies.

In the case of Madrid, the education administration cited an Internal Report of the School Inspection Body, published in 2004, to explain and justify the need for the introduction of an external and standardised test. Accordingly, the levels of students' performance were below minimum standards in the main areas of knowledge (Delibes, 2005, 2008), due to the social-democratic approach to education reform, responsible for lowering standards in favour of equity and comprehensive education. As stated by a key informant with top-level political responsibilities during the process of education reform in Madrid:

For social democrats, equality is a fundamental objective, hence if you want all children to learn the same, you only have a single solution, which is to lower the standards and make all children learn less. (Politician 5)

More specifically, Aguirre's Administration suggested that school dropout levels, the "educational failure" and the low standards in secondary education were a consequence of the poor quality of primary education, which should be tackled by introducing an external test, in order to identify and address the problems of education quality and increase standards.

The introduction of the CDI test was supported by the use of the PISA results, framed as an indicator to identify the "problems" of education quality in Madrid. PISA results were used several times in the Regional Parliament as an indicator of the poor quality of education and as an argument to legitimise the enforcement of "needed measures" to "formulate a diagnostic and apply a treatment".<sup>6</sup> Surprisingly, the use of PISA to identify the problems in the Madrilenian education system was totally out of context, since the results reported in PISA 2000 and 2003 referred to the whole national context. Madrid had not participated in PISA with its own sample until 2009 and therefore the results could not be mechanically extrapolated at the regional level.

### ***SAWA as an umbrella policy solution for diverse purposes***

The construction of a learning crisis narrative contributed to define an imperative for policy change that required new policy solutions. In this context, the CDI test was framed as a feasible and desirable policy instrument to identify aspects of improvement and change the school governance dynamics. Hence, the introduction of an external standardised test in primary education, with clear learning standards attached, was presented as a core component of a broader strategy to enhance schools, teachers and students to trigger and develop a better "culture of effort" that would ensure an improvement of students' performance. Hence, the education authorities expected that the implementation of the test would "enhance transparency in results" and "improve education quality".<sup>7</sup> In order to do so, public authorities defined the basic learning standards in language and maths and established the implementation of the CDI test in order "to control through

*external evaluations the acquisition of basic knowledge and skills*<sup>8</sup> and inform families' school choices. In this sense, the selection of TBA as a policy solution was seen as a way to encompass two different main objectives:

The two fundamental ideas were to reinforce knowledge and persevere on instruction, which is not a sin and then to facilitate families' school choice. To give greater school choice. (Policy Maker 8)

This statement denotes a double (neo-conservative and neo-liberal) rationale regarding a single policy instrument. Accordingly, the use of an external and standardised test allowed at the same time the control of the learning outcomes and standards, as defended by neo-conservative positions, and the activation of the market mechanisms in education through the publication of the test results as an indicator of quality to inform parents' school choice, as defended by neo-liberal positions.

The introduction of an external standardised test was also seen as a means of emulating international "good practices" as well as a measure to improve Madrid's position in international large-scale assessments. In fact, the implementation of the CDI test was justified as a way "to reach the Lisbon Objectives, improve the PISA results and the position of the country in this ranking".<sup>9</sup> In the same direction, a key informant from the regional education administration stated that initially, the main aim of the test was to "achieve a certain level for all the students and to accomplish the curriculum" but it gradually evolved as a way to "improve the results when comparing it with international tests" (Policy Maker 3).

Specifically, the rationale behind the use of the CDI test focused on the following elements: (i) the introduction of an external test with publication of the results, would be an external incentive for schools, teachers and students to improve performance; (ii) the definition of a set of learning standards would help teachers ensure the development of basic common skills and knowledge among students; (iii) the data provided would help schools and the administration to identify weaknesses and aspects for improvement and (iv) the publication of the results would guide families' school choices.

To put this rationale into practice, the results of the test were posted publicly and since 2011, have been published in a school browser that restricted the classification of schools but facilitated a comparison between a limited number of schools according to the test results, the schools' programmes offered and information regarding school demand. From the policy instruments approach, we can understand TBA in Madrid as a general policy instrument, functioning by means of certain techniques or "concrete devices", such as the CDI test, which used specific tools understood as "micro devices" (Lascoumes & Le Galès, 2007, p. 4), primarily, the scores of schools, the ranking classification or the schools' browser. Hence, such a policy instrument was explicitly aimed at enhancing, channelling and regulating families' behaviour regarding school choice.

In conjunction with such accountability instruments, different school autonomy programmes were enacted (first initiated with the English-Spanish Bilingual Programme and then continued with other specialisation programmes, based on ICT or sports) and the extent of families' school choices broadened, implementing a single school choice area in the whole region of Madrid. The rationale or *raison d'être* of these measures was the promotion of freedom in education, considered as an intrinsic and superior value by the

public authorities. Freedom in education was understood, under a classic liberal approach, as the right for parents to choose school beyond state over-regulations:

We believe that the State is not responsible for education. No-one other than families are responsible for the education of their children and this is why they have the right to choose.  
(Politician 5)

According to the policy rationale of the education administration, the transparency of the CDI test was a way of informing families about school choice, which, in turn, required measures of school autonomy to ensure a plurality of options to exert “real choice” between different options. Interestingly, in the official discourse, the idea of school choice was not directly related to the improvement of education but to the intrinsic value of freedom in education.<sup>10</sup>

During the process of education reform, the PISA results and the OECD recommendations were also used as a point of reference and as a policy legitimisation device. If in the first period of the reform, the PISA results were used as evidence to build an education crisis narrative, in the second period they were used to demonstrate that educational policies have reported the expected outcomes. In 2009, Madrid started undertaking PISA tests with its own sample and its results were notably good and above the Spanish average. In this context, the results were used as confirmatory evidence of the positive effects of Aguirre’s education reform. Despite the obvious problems of attribution and causation, the PISA results were presented as “an endorsement of the educational policy that has been developed in Madrid during the last 7 years”.<sup>11</sup> This case is an illustrative example of a particular dynamic of policy “instrumentalisation” and “selectivity” of PISA reported in Spanish education (cf Bonal & Tarabini, 2013). Paradigmatic evidence of this strategy is reflected in an official press release of the Regional Education Department, which announced the publication of the CDI test results. This press release stresses that “the PISA report advises the development of an external test such as the CDI to improve students learning” as is the case “in the majority of countries of the OECD”. The selective use of “reference societies” (Steiner-Khamsi, 2016) to emulate and legitimise TBA can also be observed in this official media release, where it is stated that “many OECD countries, including Germany, the United States, Canada, Finland, Norway and the United Kingdom carry out this type of test and in 21 of these countries the results are published”. The press release concludes by citing the 2010 PISA report, outlining that “combining school autonomy with accountability through external and standardised tests improve student learning” (Policy Document 1).<sup>12</sup>

### ***The role of political leadership and individual factors***

Finally, regarding the main factors explaining the policy instrumentation of accountability education reforms in Madrid, it is also essential to stress the personal leading role of President Aguirre, as well as that of her closest policy advisors. Several informants noted that the main initiative to adopt the external and standardised test was led by Aguirre, who was politically influenced by Anglo-Saxon education reform and personally inspired by Margaret Thatcher as a political figure.

Aguirre has an emotional bond with the United Kingdom and she values the model of English education in which the culture of evaluation is very important (...). Madrid pioneered this reform because there was a President very engaged with this issue and a team who did our best without thinking about political correctness. (Politician 3)

In fact, the personal role and policy leadership of decision-makers and advisory teams with regard to policy instrumentation is not a new issue. Linder and Peters (1989) suggest that individual variables need to be taken into account in order to understand the policy process and the preferences for adopting certain policy instruments over others. In this sense, it is important to identify the key actors of the policy instrumentation process, considering the interrelationship between systemic factors and individual variables. Hence, identifying the role, background and cognitive factors of key players is essential in understanding how “an instrument’s meaning and appeal to decision-makers can ultimately be traced to individual perceptions and the subjective values that reinforce them” (p. 35).

In the case of Madrid, the leadership and the political preferences of Aguirre exerted a great deal of influence. Educated at Madrid’s British Council School and being a member of the Madrid Liberal Club and the Liberal Union Party in her early political years (cf Drake, 2006), Aguirre’s personal and political background is key to understanding her policy references and preferences, as well as the ideological orientation of education reform in Madrid, including the choices and specifications of particular policy instruments. Regarding her political career, we need to consider that she had previously been the Spanish Minister of Education, a position in which she initiated a reform to promote parents’ freedom of choice at national level, although she did not succeed in implementing this legislation at the time. Nevertheless, when she became President of Madrid, she found a window of opportunity to materialise her project in the region, endorsed by the Conservative National Law, enacted in 2002.

In summary, the process of education reform during the period of the Aguirre mandates contributed to the consolidation of a market-oriented education model based on a juxtaposition of multiple SAWA policy instruments that combined different policy rationales. Under the conservative rationale, TBA was used to achieve standards set by the administration in 2005 and to guarantee that the contents defined in the curriculum were being covered at schools. In parallel, the results of the test were posted publicly in order to inform families’ choices and activate market mechanisms. Finally, different programmes of school autonomy were enacted under a “restrictive” logic (Prieto & Villamor, 2018), based on predefined and limited programmes of school specialisation. In this sense, we suggest that education reform in Madrid is a good example of the Conservative Modernisation educational agenda (Apple, 2004) which in Spain, some authors described as a combination of liberal narratives to justify conservative policies (Viñao, 2012, 2016).

### ***The partial retention of accountability policy instruments***

In contrast with the educational reform trajectory of previous years, 2015 marked a period of discontinuity and even retreat of some components of the TBA system. Regardless of a certain policy consolidation of the education reform model, some relevant changes took place. School autonomy, school specialisation and parents’ school choice were further consolidated during this latter period. On the contrary, TBA evolved from high to lower

stakes, abandoning the transparency and publication of the test results and aligning the evaluation frame to national regulations.

In this latter phase, the lack of a clear and strong leadership in education reform gave more weight to intermediate officials with technical profiles and pragmatic orientations. Relevant policy discourses still advocated to further develop the SAWA model suggesting that “Spain should combine more school autonomy with accountability mechanisms” including the publication of school results and establishing a “simple and deep curriculum” (Sanz & Pires, 2016). However, the Regional Education Department desisted from publishing the CDI results to ensure that the regional policy correlated with the requirements established by the last national reform. The regional education administration changed the denomination of the test and adopted a competence-based approach, in order to align the evaluation framework with international practices being “*inspired with international tests such as PISA, TIMSS and PIRLS*” (Policy Maker 6).

The changes regarding the approaches and uses of the test could be the result of legal, cultural, political and technical factors. The first explanation is the legal – regulative framework of the last national reform, which implied a more restrictive use of accountability policy instruments regarding its transparency and consequences. The cultural and administrative tradition of Spain is also one of the most salient barriers. South European or Napoleonic administrative regimes are characterised by centralised, hierarchical and uniform bureaucracies (Verger, Fontdevila et al., 2019, p. 4), which constitute a rigid public administrative tradition. Such administrative legacy implies a salient obstacle to consolidate accountability reforms in Spain in which the “*tendency to bureaucratic control and mistrust*” represents a barrier “*to succeed at short-term a virtuous system of evaluation and accountability*” (Academic 5).

On the other hand, the political leadership is also a critical factor in understanding the lack of policy retention. Whether the role of Aguirre was key to the selection and advancement of market-accountability mechanisms, it was certainly decisive in understanding the back and fore dynamics of the policy process. Indeed, her resignation in 2012 could, consequently, explain the progressive decline of the accountability stakes in Madrid. Moreover, Aguirre’s policies coincided with a period of economic crisis and severe budget cuts, which together with an ambitious programme of education reform, generated a climate of school opposition and mistrust towards the educational administration, which the next regional government wished to alleviate. Indeed, the new administration recognised that important political factors influenced the decision to stop publishing test results, including the lack of social consensus among key stakeholders and the opposition of teachers’ unions and public school movements to the publication of these results:

I think it is important to do these things with consensus and it is true that the low stakes test works better among the educational community. This seems a consensus and we have to take it into consideration. (Policy Maker 7)

Finally, several key informants noted technical issues regarding the internal validity of the test, considering the lack of a stable and consistent design that did not allow for longitudinal comparisons and required a new evaluation instrument.

In short, a contingency of diverse factors contributed to the uneven consolidation of SAWA reforms in Madrid, especially regarding the interruption of high stakes accountability measures. Such an erratic policy trajectory evidences how, despite political and

ideological engagement on a given policy reform and the strong entrepreneurship backing of the reform at a particular juncture, contextual elements, political factors and administrative traditions operate as key mediators in the consolidation (or not) of education reforms and policy instruments.

## Conclusions

Spain has not been an early adopter of NPM reforms in education. However, over the last few decades, different Spanish regions are adopting test-based accountability, school autonomy and pro-school choice policies, following an NPM approach (Luengo & Saura, 2012; Prieto & Villamor, 2018; Verger & Curran, 2014; Verger et al., 2020). The analysis provided in this paper contributes to current debates on the policy process of SAWA reforms and the use of accountability policy instruments in Madrid, that have profound political implications.

Firstly, the case studied shows that the adoption of SAWA policies does not just respond to matters of rational suitability, neither is it the result of mere emulation dynamics. Policy adoption needs to be problematised and analysed in order to understand the motives behind the selection of certain policies and the specific features they acquire according to the context (Verger, 2016). Our analysis suggests that SAWA reforms in Madrid have been adopted with a complex, evolving and not always coherent set of policy rationales, attached to the deployment and layering of diverse devices and policy instruments. The rationales of SAWA reforms in Madrid condense two apparently contradictory mandates. TBA was initially intended to achieve standards and control the curriculum delivery, implying certain levels of standardisation and back to basics dynamics, under a neo-conservative policy approach. However, the publication of the test results in order to improve and orient school choice resulted in promoting greater levels of school autonomy and specialisation and reinforced the pro-market orientation of the reform. Here a tension emerged between, on the one hand, control and standardisation and on the other, autonomy and specialisation. This tension in the field of policy reflected the corresponding tension in the field of politics, which condensed neo-conservative and neo-liberal principles in education under the so-called conservative modernisation education agenda (Apple, 2004).

Secondly, our findings contribute to a better understanding of the relationship between the different political scales implied in the policy process, especially regarding the relationship between international and domestic education spheres. In this regard, our study shows how current educational reforms are configured by an evolving interaction between international policy models, domestic policy preferences and strategic agenda setting. In the case of Madrid, a global model of education reform – SAWA policies and TBA – has been adapted to accommodate domestic policy preferences – school choice policies and school specialisation – using international references, particularly PISA, to justify a particular approach to education reform. The results of this paper support the well-known key role of PISA in recent education reforms in many Western countries (Breakspear, 2012; Grek, 2009; Lingard & Sellar, 2016). However, consideration must be given to the fact that the uses of PISA can vary during the reform process. Initially, PISA results served to legitimise the learning crisis narrative, the introduction of a standardised test, TBA and a back to basics curriculum model, based mainly on core knowledge. Later,

PISA results were used, politically, to prove the success of the reform. Lastly, and more technically speaking, PISA was used as a reference for (re)designing the national and regional standardised tests, based on competences. The latter use of the PISA results shows that the regional and national education administration assumed the inherent PISA/OECD logics for designing the assessment tools in order “to accomplish with predominant international norms and discourses of education governance” (Verger, Fontdevila et al., 2019, p. 15). Moreover, the multiple and “divergent uses of PISA in specific contexts” (Carvalho & Costa, 2015) explain the attractiveness of this international large-scale test. Overall, this piece of research illustrates how PISA has been instrumentalised for domestic actors in order to “scandalise” and “glorify” (Steiner-Khamsi, 2003) the education system, to first start a process of education reform and secondly, legitimise the orientation of the policies, adopted in the context of the reform.

Thirdly, the results nuance the conception of policy instruments as institutions that have an autonomous life “independently of their stated objectives” and generating particular dynamics “structuring public policy according to their own logic” (Lascoumes & Le Galès, 2007). As in other cases, this process of policy restructuring is generated by an incremental and cumulative use of different policy instruments “not necessarily articulated in a predefined reform programme” (Verger, Fontdevila et al., 2019, p. 16) but with a wide-reaching and diverse impact on the educational governance architecture. In the case of Madrid, this incremental reform took place by combining TBA policy instruments with school choice, specialisation and school autonomy and generated a profound change in the governance of the education system. Nonetheless, the evolution of such instruments has been highly reliant on political contingencies and agendas.

Finally, the partial retention of accountability policy instruments supports the hypothesis of politico-administrative legacies as key mediating factors, explaining policy retention. Spain and Madrid, as part of the Napoleonic administrative tradition, present a late and erratic process of managerial education reform, in which the implementation of accountability instruments has been uneven and highly conditioned by political contestation (Verger, Fontdevila et al., 2019, p. 8). Therefore, the strong leadership and entrepreneurship of President Aguirre could initially explain the first developments of education reform and policy instrumentation. However, political factors regarding social consensus and national legal frameworks hindered the consolidation of high stakes accountability policy instruments. Hence, path dependency and systemic factors prevailed and played a greater role in the phase of policy retention of accountability tools, adapting the uses and orientations of policy instruments to the administrative context, whereas market mechanisms have been routinised and reached deeper policy consolidation. In this sense, and despite the aforementioned back and forth dynamics regarding accountability stakes, TBA is still a salient policy instrument in the governance of the education system in Madrid and still coexists with school choice, specialisation and school autonomy policies. However, the nature of the effects and effectiveness of these policies still needs to be analysed. Since policy instruments are not neutral tools and they produce changing power relations among different actors, more research is needed to understand the evolving relational dynamics among schools, teachers, families and students within SAWA regimes. Exploring the relations of test-based accountability, school autonomy and school choice in different school contexts, is a challenge for future research. Specifically, further research should explore how teachers, schools and families enact



and respond to SAWA reforms and by doing so, identify the implications of these reforms in terms of educational equity and quality.

## Notes

1. The concept of accountability is defined as a “relationship between an actor and a forum, in which the actor has an obligation to explain and to justify his or her conduct, the forum can pose questions and pass judgement, and the actor may face consequences” (Bovens, 2007, p. 450).
2. By rationale we refer to taken for granted ideas about a given policy problem, the main reasons, ideas and principles behind the selection and subsequent privileging of a certain policy option and the projected expectations as a result of a policy solution.
3. The historical retreat of the State from education provision and the traditional role of the Catholic Church in providing education had configured a dual system of schooling. According to Verger et al. (2016) in areas such as Madrid, regional governments took advantage of this legacy to consolidate a dynamic of “education privatization expansion” (p. 115). As a result, and according to official data, the percentage of students enrolled in publicly funded private schools is 37% in Madrid, while the average in Spain is 29%. In the case of private schools, the percentage of students in Madrid is 10% while the average in Spain falls to 4%. Although traditionally publicly funded private schools were Catholic, from 2005 to 2012 this trend may have changed. According to Carpintero and Siemiatycki (2015), among the new private schools funded by the educational authorities during this period, only 24% were institutions related to the Catholic church, while 34% were cooperatives of teachers, and 42% private companies. However, most publicly funded private schools are still Catholic institutions.
4. Regarding the regulatory framework of publically subsidised private schools, two main aspects have traditionally played a key role in terms of school autonomy. First of all, the funding scheme is *de facto* a co-funding model between the state and families. Although in legal terms publicly funded private schools must be free for families and students, these schools usually ask for a voluntary contribution, with amounts that vary depending on the type of school and the socioeconomic profile of the families. Despite the voluntary character of the contributions, most of the families assume it is what gives these schools greater economic and management autonomy. Secondly, these schools have traditionally enjoyed autonomy in the recruitment of teachers, in contrast to public schools, which get their teachers from a centralised system. Both types of management autonomy, economic and teachers’ selection, tended to benefit publicly funded private schools, which can often better adapt to families’ demands.
5. <http://www.madrid.org/cs/Satellite?blobcol=urldata&blobheader=application%2Fpdf&blobheadername1=Content-disposition&blobheadername2=cadena&blobheadervalue1=filename%3Dres+estandares.pdf&blobheadervalue2=language%3Des%26site%3DTurismo&blobkey=id&blobtable=MungoBlobs&blobwhere=1158626404767&ssbinary=true>
6. Diario de Sesiones de la Asamblea de Madrid Nº 419/4 de mayo de 2005, p. 12,147  
See: <https://www.asambleamadrid.es/static/doc/publicaciones/VII-DS-419.pdf>
7. Diario de Sesiones de la Asamblea de Madrid Nº 492/22 de junio de 2005  
See: <https://www.asambleamadrid.es/static/doc/publicaciones/VII-DS-492.pdf>
8. Diario de Sesiones de la Asamblea de Madrid Nº 419/4 de mayo de 2005, p. 12,148
9. DIARIO DE SESIONES DE LA ASAMBLEA DE MADRID/Nº 419/4 de mayo de 2005 p. 12,158  
See: <https://www.asambleamadrid.es/static/doc/publicaciones/VII-DS-419.pdf>
10. This position is well exemplified in several public statements of President Aguirre, see: <https://www.youtube.com/watch?v=5eOmdh21bUs>
11. DIARIO DE SESIONES DE LA ASAMBLEA DE MADRID/Nº 810/16 de diciembre de 2010, p. 23,622.  
See: <https://www.asambleamadrid.es/static/doc/publicaciones/VIII-DS-810.pdf>

12. <http://www.madrid.org/cs/Satellite?blobcol=urldata&blobheader=application%2Fpdf&blobheadertype=Content-Disposition&blobheadervalue1=filename%3D111226+PUBLICACI%33%93N+RESULTADOS+CDI+PRIMARIA.pdf&blobkey=id&blobtable=MungoBlobs&blobwhere=1310778161403&ssbinary=true>

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