

**Industrial relations in global educational governance\***

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**Abstract**

This paper provides a critique of the unfolding relations between state authorities, capital and labour in global education governance. Like in other public policy areas, education has become a subject for global governance over the last decades, raising the issue whether and how civil society and social partners like unions and professional associations are included in decision-making. So far, little research has been produced in this area. The paper focuses on the case of the Teaching and Learning International Survey (TALIS). TALIS is coordinated by the Organisation for Economic Co-operation and Development (OECD) and the survey programme targets teachers and school leaders with questions concerning school leadership, teacher education and professional development, appraisal and feedback, pedagogical beliefs and practices, job satisfaction and self-efficacy. The TALIS programme represents a pinnacle so far in the unprecedented political attention directed towards teachers internationally, and the design and implementation of the programme involved a range of policy actors, including the European Commission and the global teacher union Education International, along with state authorities, research institutions and business interests. TALIS thus reflect a major transformation under way aimed at reframing and rescaling where and how decisions are made around teachers' work and the nature of the profession more generally. This paper draws on critical realism and the emerging research agenda of critical cultural political economy and is based on an empirical material of documents (reports, policy papers and conclusions, meeting materials, news items, websites) and eleven theory-laden qualitative interviews conducted in the period September 2014 – September 2015 with personnel from the OECD Directorate for Education and Skills, the European Commission's Directorate General for Education and Culture, Education International, and business interests. We show that government, labour and capital are all entangled in the expansion of a common space of measurement for the purpose of unifying and administering education systems on a global scale. In particular, we show the distinctive ways the OECD and the European Commission attempt to frame teachers' work; why and how Education International became engaged in TALIS and thereby legitimated the programme; and that private enterprises and foundations are very active in trying to make business on the basis of TALIS data. Most importantly, our analysis shows that the practical enactment of industrial relations in the TALIS programme are embedded in soft governance mechanisms, not subject to legal regulation and without a third party to be called upon. Due to its strong engagement in TALIS, especially labour as represented by Education International is highly visible in TALIS. Yet, while they have the right to speak there is not any guarantee that that they will be listened to.

### 1. Teachers on the global policy agenda

The objective of this paper is to provide a critique of the unfolding relations between state authorities, capital and labour in global education governance. Like in other public policy areas, education has become a subject for global governance over the last decades, raising a range of issues concerning democratic legitimacy and accountability, including the ways civil society and social partners like unions and professional associations are included in governance and the strategies they adopt to further their interests (Carter *et al.*, 2012; Robertson, 2012).

The paper focuses on the case of the Teaching and Learning International Survey (TALIS) which is coordinated by the Organisation for Economic Co-operation and Development (OECD) and follows a five-year cycle. The TALIS programme represents a pinnacle so far in the strong political attention directed towards teachers internationally since the early 2000s, with the OECD, the World Bank, and the United Nations Educational, Scientific and Cultural Organization (UNESCO) as the major transnational players (Connell, 2009; Robertson, 2012a; Robertson, 2013).

TALIS is a survey among teachers and school leaders that asks questions concerning school leadership, teacher education and professional development, appraisal and feedback, pedagogical beliefs and practices, job satisfaction and self-efficacy. TALIS has been conducted twice, with 24 and 34 political entities (mainly countries, but also a few sub-national political entities) taking part in TALIS 2008 and 2013 respectively (OECD 2009; OECD, 2014a). The main target group is school leaders and teachers in ISCED 2 schools. However, TALIS 2013 offered participants to sign up for the “international options” to include ISCED 1 and 3 staff as well, and a TALIS-PISA link aligning sample populations with those of the Programme for International Student Assessment (PISA), OECDs high-profile programme (OECD, 2014a, p.27).

The critique is based on literature reviews, policy documents and eleven theory-laden qualitative research interviews (Pawson 1996) conducted between September 2014 – September 2015 with staff and representatives of the OECD (3 interviews), Education International (4 interviews), the Directorate General for Education and Culture (DG EAC) of the European Commission (3 interviews), and the Business and Industry Advisory Committee to the OECD (BIAC, 1 interview). These organisations are all directly involved in the TALIS programme.

Theoretically, the paper highlights the epistemic gain for critique, and more specifically *explanatory* critique, in bringing critical cultural political economy of education

and historical institutionalism into a conversation. While critical cultural political economy of education is a broader research agenda and arguably better theoretically equipped than historical institutionalism in explaining the mechanisms driving social change, the concepts of institutional regimes, path-dependency and feed-back effects developed in historical institutionalism might be helpful in pursuing the stated purposes of the former, that is, capturing the complexity of the global educational policy field in terms of its forms, scope and outcomes. In this sense, critical cultural political economy of education and historical institutionalism might complement each other in empirical inquiry.

The paper proceeds with a brief literature review before a section outlining the ontological and epistemological foundations of historical institutionalism and critical cultural political economy of education. The core part of the paper then follows with a discussion of state, labour and capital relations in the OECD programme TALIS, with the basic tenets of the two research agendas as reference points. The concluding remarks summarise the explanatory critique of industrial relations in global education governance that comes with bringing the two research agendas together.

## **2. Industrial relations in global education governance**

Little research has been produced into how the relations between state authorities, teacher unions and capital unfold with contemporary globalising processes in education governance. It would appear that relations between state authorities, teacher unions and capital are subject to a dual dynamic of de-nationalisation (Robertson and Sorensen, forthcoming) but the particular implications for industrial relations are not clear. The rescaling is bound to have cultural, political, economic and educational implications. Since the advent of mass education, teachers have been employed as a key labour force in continuing processes of state formation and nation-building (Anderson, 2006; Connell, 1995; Green, 2013), and industrial relations in education have played out differently in national and sub-national contexts depending on prevailing ideologies and institutional regimes (Robertson, 2000). In our contemporary era of global governance, it appears pertinent to ask for which new major projects teachers are employed, and how labour unions in the area are to respond.

The relationship between international public bodies like the OECD, labour unions and capital thus provides for a topical issue with wide-ranging implications as well as an obvious case for a conversation between critical political economy of education and historical

institutionalism. Due to its character as a survey addressing the teaching profession itself, TALIS stands out as a particularly intriguing.

Industrial relations between state, labour and capital in the policy area of education have been subject to remarkably little scrutiny in the literature, and this is even more the case in global education governance (Carter *et al.* 2010; Robertson, 2000; Robertson, 2012). The political attention directed towards the teaching profession internationally only serves to stress the need for knowing more about the ways teacher unions serve as countervailing powers in the organisation of education in various policy spaces.

The account by Farnsworth (2005) provides a backdrop for the analysis in this paper. Farnsworth shows that labour in OECD fora during the 1980s and 1990s faced an international bias towards capital driven by a state sponsored neoliberal agenda committed to the institutional privileging of business-centred social policy. Moreover, Farnsworth shows that labour during that period became more accommodating of business preferences while organised capital also came to endorse a more positive view of social policy. Yet, Farnsworth argues that OECD social policy continued to be driven primarily by the needs of business rather than the needs of labour, and on this basis calls for the strengthening of labour's voice in tripartite negotiations at the international level.

These points resonate with the few studies focusing on industrial relations in global education governance. Robertson (2012) argues that teachers are simultaneously visible and invisible in global governance, a paradox owing to that the subject of teachers and their role in knowledge economies is a prominent theme on the political agenda yet the voice of teachers themselves is not recognized in the debate. Major analytical points include that state authority has come to operate across the national and global scale, and that the global teacher union Education International's endorsement of the TALIS programme suggests that this major labour organization to some extent has aligned with the policy preferences of state authority and its brokering, classification, and framing of teachers' pedagogical practice as the social base of the new knowledge economy. Moreover, capital in the form of companies and philanthropic foundations has been able to position itself in global education governance as key providers of research, assessment, data management and consultancy with strong implications for politics and policy-making.

Robertson's analysis calls for the investigation of the extent to which teacher unions have aligned with the "globalization comparativism" (Cusso and D'Amico, 2005) driven by international assessments of student performance like PISA and promoted by various agencies of state authority since the late 1990s - and skilfully exploited by capital.

The account in Sorensen and Robertson (forthcoming) goes some way in this respect by outlining the institutional structures of TALIS and the overall TALIS ensemble engaged in the programme. We pointed out that TALIS is a major research exercise as well as a political construction. With the OECD as a master framer in global education governance due to the successful enterprise of PISA, TALIS is part of the efforts to reframe the teacher profession for global competitiveness with implicit preferences for constructivist pedagogy and increased flexibilization of teachers' labour. In particular, we showed that Education International endorsed TALIS somewhat cautiously. Largely based on the same empirical material, this paper elaborates on this previous analysis with a focus on state, labour and capital relations and referring to the tenets of historical institutionalism and critical cultural political economy of education.

### 3. A common agenda for explanatory critique

The notion of explanatory critique adopted in this paper draws on critical realism and refers to a particular form of critique based on causal analysis through the identification of generative mechanisms, contextual conditions and contingent outcomes. Without suggesting absolute truth claims, explanatory critique provides for a strong form of critique oriented towards the reduction of illusion in society through the critical evaluation of influential concepts and accounts, showing the extent to which they are false or at least inconsistent by ignoring something significant. Moreover, explanatory critique seeks to explain *why* such false or inconsistent beliefs are held and expose their potentially self-confirming character – intended or not – whereby they help to maintain circumstances that are favourable to dominant groups (Sayer, 2009, pp.769-770; Sayer, 2010, pp.253-257).

Coates (2005) argues that a sustained critique of contemporary capitalism should include the analysis of interests of collective actors and how these interests change over time in various capitalist models, and the implications of global trends for the viability of particular internal settlements between classes.

The conversation between critical cultural political economy of education and historical institutionalism helps us to clarify the role of labour as a countervailing power in the organisation of production. Both research agendas are broad and susceptible to cross disciplinary boundaries. Along with rational choice institutionalism and sociological institutionalism, historical institutionalism is associated with the “new institutionalism” that became prominent from the 1980s (Hall and Taylor, 1996; Thelen, 1999). Critical cultural political economy is a more recent attempt to bring political economy into a productive

conversation with the cultural turn in social sciences (Jessop, 2007; Sayer, 2001; Sum and Jessop, 2013).

Despite their eclectic nature, the two research agendas share distinctive characteristics in terms of ontology and epistemology (for historical institutionalism, some key texts include Hall and Taylor, 1996; Steinmo *et al.*, 1992; Thelen, 1999; for critical cultural political economy, see for example Jessop *et al.*, 2008; Robertson and Dale, 2015; Sayer, 2001; Sum and Jessop, 2013). With regard to their knowledge interests, they are both committed to explanation of social reproduction and change through tracing of processes over time. They view social reality and change as contingent but not random, non-deterministic yet non-voluntarist. There is a scope for agency, ideas, strategic reflexivity and unintended consequences, embedded in structures, situationally constrained and enabled by contextual conditions, without subscribing to generalization or particular basic drivers, such as rational self-interest or class tensions. It follows that they distance themselves from functionalist views of policy-making as coordination fluctuating around equilibrium. The ontological positions of critical cultural political economy and historical institutionalism would thus appear to correspond with Granovetter's seminal argument (1985, p.487):

*"A fruitful analysis of human action requires us to avoid the atomization implicit in the theoretical extremes of under- and oversocialized conceptions. Actors do not behave or decide as atoms outside a social context, nor do they adhere slavishly to a script written for them by the particular intersection of social categories that they happen to occupy. Their attempts at purposive action are instead embedded in concrete, ongoing systems of social relations."*

In terms of epistemological positions, critical cultural political economy and historical institutionalism both aspire to identify generative mechanisms of change and their basic conditions through process tracing or "diachronic analysis" informed by theory-laden empirical inquiry on the interplay of policy actors, their interests and how these interests change over time. Organisations and institutional arrangements are obvious objects of empirical inquiry, with an emphasis on the asymmetries of power associated with their operation and development and the ways some interests are privileged while others are demobilized or sidelined. While both research agendas are committed to theory-building through empirical research, they make no claims to universal applicability or future predictability. Operating on the basis of a retrospective time-orientation, they are mid-range theories occupying a mid-way position in the broad philosophical space between methodological individualism of the neoliberal tradition and the structuralism of historical materialism.

Historical institutionalism and critical cultural political economy of education construct their objects of study as “institutional regime” and “education ensemble”, respectively. Like in the case of other theoretical resources such as field (Bourdieu, 1981; Bourdieu *et al.* 1994; Lingard and Rawolle, 2011) and assemblage (Robertson, 2012b; Sassen, 2006; Landri and Neumann 2014), these distinctive constructs have implications for what is captured and what is left outside the frame. In the following sections, they are applied for the explanatory critique of the unfolding industrial relations in global education governance.

#### **4. The institutional regime of TALIS**

Historical institutionalists encourage us to explain political and economic development as a structured process and how institutional regimes emerge from particular historical conflicts and constellations. In historical institutionalism, causal analysis is thus inherently sequence analysis. Rich descriptive narratives informed by theory-laden empirical inquiry are favoured means of reflecting upon complex processes by examining the interplay of actors, ideas and institutions and identifying the mechanisms of institutional change, their basic conditions and developmental pathways.

It follows that contextualization is deemed imperative to capture contextual conditions and explain how developments in one realm impinge on and shape developments in others, as well as how processes at the international and domestic levels unfold in relation to one another. Political systems and economies are thus understood as socially embedded clusters of institutions that vary in the character of the distinctive institutional structure for governing the markets of labour, land, capital and goods.

Institutional regimes are perceived to be ‘sticky’, that is, not easy to change or likely to change mostly along an established path. In comparative research, institutional variations and their sustained divergence are to be expected and observed over time, because of parallel virtuous and vicious circles of growth and decline that pull and keep economies apart. With the notion of path-dependency, historical institutionalism thus suggests rigidity in institutional regimes and that political entities and institutional regimes at critical junctures have been set on different developmental paths. These might to some extent be viewed as mutually complementary yet the potential complementarity should not be understood in functionalist terms, but rather as an indication that institutional regimes develop and define themselves in relation to each other.

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In this sense, institutional regimes reflect enduring legacies of political struggles. Labour institutions regulating collective interests and collective organization between the market and the state are deemed especially important for capitalist variety, in terms of the extent to which these intermediary institutions are labour-inclusive and allow non-capitalist interests to insert themselves in the governance of the capitalist political economy, for example through tripartite negotiations with the state and capitalist employers (Coates 2005, pp.14-21; Hay 2002, pp.45-50, 148-150; Streeck and Thelen 2005; Thelen, 1999; Zysman 1994).

Taking these cues to the case of the TALIS programme and industrial relations in global education governance allows for several insights.

First, it is clear that TALIS has been conditioned by a number of overlapping developments, some of them internal to the OECD, others external. Within the OECD, TALIS represents a case of path-dependency, involving elements of both continuity and structured change from its beginnings in the mid-2000s building on previous indicator development and especially the major policy review reported in the *Teachers Matter* (OECD, 2005), to its recent upgrade to a so-called OECD Part II programme in January 2016 which reflects that the TALIS is regarded as being past its phase of consolidation and that participating countries are supposed to commit themselves to TALIS for more rounds.

The main OECD body concerning TALIS is the TALIS Board of Participating Countries (BPC) the general features of which have been stable for both the 2008 and 2013 rounds. The TALIS BPC is at the centre of the TALIS institutional regime as it is here that the policy objectives for the survey and the standards for data collection and reporting are established. The board consists of a representative from each participating political entity. Moreover, the European Commission, UNESCO, the Trade Union Advisory Committee to the OECD (TUAC), and the Business and Industry Advisory Committee (BIAC) have observer status in the body. TUAC and BIAC are the formal OECD mechanisms for consultation with civil society. The TALIS BPC selects its own chair, and over the first two rounds, the chair was the representative from Norway. For the TALIS 2013 round, an executive group of government authorities was elected to assist the chair and the OECD Secretariat in preparing meetings in the TALIS BPC (OECD 2009, pp.303-305; OECD 2014, pp.434-436; OECD, 2015a).

The TALIS programme has been shaped by the particular institutional regime underpinning the European Commission's steering and coordinating role in European Union education governance. The focus on teachers in TALIS overlapped with the imperatives of



the European Union's Lisbon Strategy to connect lifelong learning with economic competitiveness. Accordingly, European Council Conclusions gave the Commission the mandate to pursue cooperation with the OECD and encourage member countries to sign up for TALIS. This dimension of European regionalism was arguably crucial as a "feedback effect" to help getting TALIS off the ground (Robertson and Sorensen, forthcoming).

More generally, TALIS reflects the institutional trajectory of the OECD in recent decades and "the learning shift" in its orientation of statistics and indicators development, with the Programme for International Student Assessment (PISA) as the high profile programme framing TALIS (Robertson and Sorensen, forthcoming). However, we should not exaggerate the unified character of OECD or its role as a master framer of education policy. The OECD is funded by state authorities in its member countries and beyond and therefore continues to rely on their support in programme development (Marcussen and Trondal, 2011; Woodward, 2009). In this respect, the US government stands out as the main funder of OECD overall, and in education, US influence would appear to have been tremendous. Further research is clearly needed to trace these processes and put them in context. The major critical juncture in the OECD institutional regime during the latter decades was the "learning shift" in OECD statistics and indicator development in the 1990s. The juncture was prompted by US government and modelled on assessment technologies in the US (Sorensen, forthcoming; Valiente, 2014).

TALIS is thus overall characterized by logics of incrementalism and appropriateness and thus a sense of bounded rationality. The relational character of institutional developments appears to result in continuing processes of "partisan mutual adjustment" (March and Olsen, 1989; Peters, 2015, pp.44-49) driven by overlapping objectives among state authorities, with varying interests and influence, and the intergovernmental agencies of OECD and the European Union to place teachers on the global governance agenda, and, of course, to shape that agenda (Robertson, 2012).

### ***4.1. Industrial relations in the TALIS institutional regime***

Turning to our focus on industrial relations, TUAC and BIAC are part of the TALIS institutional regime and they contribute in their own ways to its mode of operation. By all accounts, and in line with the formal institutional arrangements, the scope for them as observers in the TALIS BPC to exert influence on the conception, design or outcomes of TALIS were limited and inferior to that of participating countries. Neither TUAC nor BIAC is involved in the overall design of the survey, with its "international options", nor the

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appointment of the contractor responsible for coordination and management of implementation at the international level. Furthermore, neither of them have had a decisive role in shaping the selection of policy themes and indicators. The participating OECD political entities select the policy themes to be covered through a priority-rating exercise. TUAC and BIAC can only react to this institutional fact (see also OECD 2013, pp.9-13).

Like other OECD programmes, TALIS is based on soft governance mechanisms. This point is driven home by the fact that staff from OECD, DG EAC, Education International and BIAC all pointed to two features of the practical enactment of the TALIS institutional regime at the BPC meetings during the first two rounds of the programme: i) An open method of coordination encouraged compromise and built consensus. The series of meetings in the round of TALIS 2013 thus took place without a single vote; and ii) Personal relations matter. There has been a high degree of continuity, with at least half of the representatives in 2014 having attended BPC meetings since its foundation in 2006. Over the years, personal and constructive relationships have been built between the participants.

In the practical enactment of the TALIS institutional regime TUAC and BIAC representatives behaved very differently. BIAC were mostly observing during meetings, and we might attribute their strategy to two circumstances: i) OECD education policy is not among the higher priorities for BIAC and their policy activities in the area are somewhat scattered and loosely organised; ii) the BIAC representatives who took part in TALIS BPC meetings felt no need to comment because they were pleased with the overall development of TALIS.

In contrast, TUAC representatives were very vocal in the TALIS BPC, and the labour union side have been more committed to a concerted engagement with the programme than BIAC. The global teacher union Education International has been engaged with TALIS since the launch of the programme around 2006. Through the TUAC Education, Training and Employment Policy Working Group, Education International sent representatives to meetings in TALIS BPC and endorsed the OECD programme overall while asserting that it would seek to ensure that TALIS reports fully reflect the interests of teachers. Accordingly, affiliates were encouraged to mobilise support for TALIS among their members (Education International, 2012).

### ***4.2. The background for labour union involvement***

Education International characterises itself as the voice of teachers and education employees across the globe. It is the world's largest federation of unions, with 396

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associations and unions in 171 countries and territories, altogether representing some 32.5 million educators and support professionals in education institutions from early childhood to university.

We should note that Education International is financed by its affiliates which also determine the overall policy priorities. Education International has thus been provided with a broad mandate by its affiliates to negotiate on their behalf in the TALIS BPC. The Education International representatives in the TALIS BPC reported to a sub-group of affiliate member organisations ‘after the event’ through the formal OECD mechanism of the TUAC working group which come together twice annually at OECD in Paris. TALIS BPC meetings are confidential so agendas or material could not be shared in advance.

In the aftermath of the major OECD-coordinated teacher policy review which resulted in the report *Teachers Matter* (OECD, 2005), Education International was concerned about the policies of the OECD and its Directorate of Education that had been established in 2002 and chose a confrontational approach when responding to the report. According to a senior official from Education International:

*“And at that time, with that report, we saw a danger. Because we thought and that’s how it looked like, that the OECD is going down a very, not primitive, but somehow very straightforward policy agenda of privatising things and introducing business working methods in education, and more flexible hire-and-fire issues with teachers, you know, and we took it as kind of, kind of attack, little bit. So, we were quite defensive, and we spoke against it, and we managed quite well, I think, because starting from our interaction with that report, OECD took out many of these statements about private sector and the private working methods, etc, etc.”*

Especially the issue of performance-based pay for teachers stood out for Education International and its affiliates “like a red line that we have to do whatever it takes to counter”. Among the affiliate member unions of Education International, there have been debates concerning what would be the better strategy in coping with the undeniably strong position of the OECD in global education governance and whether Education International should reject any engagement with TALIS or get involved in the programme. The latter approach was adopted and, resonating with the federation’s response to PISA (Education International, 2007), Education International became engaged in TALIS to shape the very construction of knowledge in teachers and more generally to challenge the evidence presented by “knowledge brokers” such as OECD and influential consultancies such as Pearson Education and McKinsey & Company.

In other words, Education International has treated TALIS as an essentially political construction which through the prioritisation of certain policy themes, indicators and phrasing

of questions is bound to contain a bias towards particular notions of education and society. The preparation of survey questionnaires was therefore a focal point for Education International at the TALIS BPC meetings, reflected in the following statement from a senior official:

*“Everybody agrees that of course policies should be based on evidence, but what that evidence is, who defines it, how it is collected, I mean, even down to the fact what kind of questions you ask. And that is where we clashed always ... I mean, the most political was the discussion of the TALIS questionnaires, that is where you really get down, why are you asking this question, what do you want to ... what is your purpose, what will you do with the answers? [...] I mean, by phrasing the questions you already imply what kind of evidence you are looking for. And then you would correlate, and you would say, well, best-educated teachers want to be in a more flexible working environment, where they could easily get more lessons, or be paid ... I mean, they never asked questions whether you would like to be paid based on test results of your students. If they would try to ask that question we would oppose that very forcefully, and not because we don't want to know what teachers actually think about it, but because we know that that would not be beneficial for the policies that we advocate.”*

### **4.3. The emphasis on formal government and legal policy instruments**

In terms of industrial relations, this account is intriguing. The OECD TALIS Secretariat ostensibly facilitates a debate between state authorities that can lead to a consensus on the sort of issues on teachers that they would like to know more about. The documents and the interviews underpinning this analysis show that labour and capital, put in crude terms, can only react and comment on this debate, with the former appearing defensive, and the latter content with current developments. At the same time, the OECD is expected to lead this debate and the TALIS programme is framed by the OECD's efforts to sell its programmes and profile itself towards state authorities in member countries and beyond as well as directly to school staff around the world (see also Lewis, forthcoming; Sorensen and Robertson, forthcoming; Rutkowski, 2014). The element of European regionalism and the formalised working partnership between the EU and the OECD only serves to further blur the structures of the TALIS institutional regime.

Drawing on the theoretical apparatus of historical institutionalism, the unfolding industrial relations in the TALIS institutional regime and at the international summits might result in self-reinforcing “positive feedback” that helps to maintain the dominant path set out with the critical juncture of the “learning shift” in the 1990s. Education International was effectively given a mandate by its affiliates to pursue a strategy of *rapprochement* that goes with the grain of global education governance while seeking to maximise gains through interest-based bargaining and identification of common solutions (see Carter *et al.*, 2010). Yet, this might effectively reinforce the logic of the system in place and reproduce the power

distribution in politics. Altogether, this could feed back so that some avenues of policy might become blocked over time.

Yet, this analysis arguably overlooks fundamental characteristics of contemporary global education governance. Historical institutionalism tends to focus on formal rules and their legitimation, enforcement and compliance by rule-makers and rule-takers with divergent interests, varying normative commitments, different powers and limited cognition. As a case in point, Streeck and Thelen (2005, pp.10-16) draw a line between “formal” and “informal” institutions and argue that whereas the former change by decision, the latter change by cultural evolution. They claim that to the extent that modern economies are governed by politics, and thus constitute political economies, they are mainly controlled by formalized norms and sanctions. Therefore, they exclude informal institutions, including socialized norms, conventions, mores and customs, as the subject of study in political economy, effectively leaving culture as a residual category. On this basis, Streeck and Thelen define “regime” as a set of rules stipulating expected behaviour and ruling out behaviour deemed to be undesirable. Rule-makers set and modify, often in conflict and competition, the rules with which rule-takers are expected to comply:

*"[...] institutions may be defined as building blocks of social order: they represent socially sanctioned, that is, collectively enforced expectations with respect to the behavior of specific categories of actors or to the performance of certain activities. Typically they involve mutually related rights and obligations for actors, distinguishing between appropriate and inappropriate, 'right' and 'wrong', 'possible' and 'impossible' actions and thereby organizing behaviour into predictable and reliable patterns."* (Streeck and Thelen 2005, p.9, original emphasis)

Streeck and Thelen (2005, p.11) elaborate that they conceive institutions as formalized rules that may be enforced by calling upon a third party that “*predictably and reliably come to the support of actors whose institutionalized, and therefore legitimate, normative expectations have been disappointed.*”

This definition suggests a view of institutional regimes as chiefly regulated by legal policy instruments set out by rule-makers and imposed on rule-takers. In relation to global education governance this view is illuminating in exposing the absence of legal regulation yet insufficient to actually capture the dynamics at work.

First, the view does not capture how power relations unfold in the case of policy instruments based on knowledge and information rather than legislation (see Peters, 2015, pp.101-123). Contemporary global education governance is driven by competitive comparison and peer pressure on the basis of international comparative research and therefore

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defies the crude distinction between rule-takers and rule-makers and the associated notion of institutional regime (Nóvoa and Yariv-Mashal, 2003; Martens, 2007; Sorensen, forthcoming). Bieber et al. (2014) shows that the OECD does not have any binding governance instruments at its disposal but that the organization is still regarded as an authority in the field of contemporary education policy. The OECD is able to influence national policy-making with soft governance mechanisms that create public attention and political pressure to introduce national education reforms according to best practice examples as revealed with the help of PISA.

Moreover, we should ask what rights and obligations labour and capital representatives have and which third party they could call upon in the context of global education governance. For both labour and capital, their status as permanent observers in the TALIS BPC includes right to be consulted and heard, but there is ultimately no third party to be called upon.

The TALIS institutional regime is a study in soft power. Historical institutionalism is helpful in pointing out the relational character of institutional arrangements and political struggles that go into their development. In addition, the TALIS regime and the industrial relations embedded in it might very well turn out to reflect path-dependency over time. Historical institutionalism would clearly also be relevant for the comparative analysis of how industrial relations in OECD education policy might feed into industrial relations on other scales, mediated by the idiosyncratic institutional regimes in place (see Bieber *et al.*, 2014, for a study on the effects of PISA).

But, with its emphasis on legal dimensions of governance, historical institutionalism does not provide us with theoretical resources for explaining the unfolding of power relations, and industrial relations, in global education governance. This resonates with the common criticism of historical institutionalism that the research agenda overemphasises the extent of path-dependency and has not developed theories of institutional change, including how institutions affect individual behaviour and vice versa (Hall and Taylor, 1996, pp.950-955; Streeck and Thelen, 2005).

## **5. The TALIS ensemble**

The research agenda of critical cultural political economy is more expansive than historical institutionalism. Without any aspirations to produce a grand synthesis, the research agenda is distinctive in that it seeks to study the ways in which the cultural, political and economic work on, in, and through education, and vice versa. Robertson and Dale (2015)

advocate the notion of ‘education ensemble’ which, understood within a critical realist philosophy of science and an associated stratified ontology that incorporates a constructivist element, translates into a particular kind of social world made up of various layers of structures and generative mechanisms, as a unity of multiple determinations. Therefore, in the explanation of education ensembles we should distinguish between experiences, patterned events and generative causal mechanisms. The constituent parts of an ensemble are made up by causal groups, that is, individuals, organisations and other social formations placed in substantial internal relations with each other, with powers emergent from, though not reducible to, its parts (Robertson and Dale, 2015; Sayer, 2010; see also Jessop *et al.*, 2008; Sayer 2001; Sum and Jessop 2013).

Robertson and Dale (2015) provide us with an array of theoretical resources to “break open” the education ensemble. First of all, learning is viewed as a collective property of the social world and hence also placed at the centre of anything that tend to be associated with education yet not reducible to the forms of activity taking place in formal learning institutions such as schools. More specifically, education concerns the creation of a network of workers and practices that sustains the second order learning capacity of “learning how to learn” for individuals as well as for the collectivity, and hence the social world that the individual is entering (see Connell, 1995, pp.97–98).

Moreover, another obvious difference from historical institutionalism is that culture is theorised. The conception of culture is broad, including discourse, semiotics as well as social practices, experiences, feelings and forms of reflexivity. These are brought into the analysis of shifts in the orders of discourse, meaning-making, and “civilisational projects”.

By implication, the notions of politics, policy and economy are also broader conceived in critical cultural political economy than in historical institutionalism. Politics and policy are held to operate in explicit as well as implicit ways through formal institutions as well as informally. In other words, formal government alone does not address everything that has real political implications. Moreover, the view of economic relations goes beyond only considering capitalist modes of organising the relations of production, distribution and exchange (Robertson and Dale, 2015; see Table 1).

	<b>Critical cultural political economy of education</b>	<b>Historical institutionalism</b>
<b>Object of study</b>	Education ensemble	Institutional regimes, conceived as formal institutions
<b>Culture</b>	Civilisational projects Social practices, experiences, feelings and forms of reflexivity	-
<b>Politics and policy</b>	Politics and policy operating explicitly and implicitly, in formal institutions or beyond.	Formal government: The formal structure and practical enactment of formalized rules and organisations that may be enforced and legitimated by calling upon a third force; changing on the basis of decision.
<b>Economy</b>	Capitalist economies and beyond	Focus on advanced capitalist economies
<b>Education</b>	Education as the creation of a network of workers and practices that sustains “learning how to learn” for individuals as well as for the collectivity	-

**Table 1. Concepts of culture, politics and policy, economy and education (Robertson and Dale, 2015; Streeck and Thelen, 2005)**

Accordingly, the notion of “education ensemble” is more inclusive than the “institutional regimes” of historical institutionalism. The “TALIS ensemble” is thus to be understood as a series of events which can be realized or recognised at the level of pattern. Sorensen (forthcoming) argues that the underlying causal mechanism that made TALIS possible is the drive in global education governance during the latter decades towards applying policy instruments based on information-processing. This mechanism in the domain of the real has descriptive and prescriptive dimensions and might, if triggered which we can only assess over time, help the further creation of a common space of measurement for the purpose of unifying and administering education systems on a global scale. Moreover, TALIS was enabled by two contextual conditions: i) the “learning shift” in OECD’s development of indicators in education, a shift underpinned by human capital theory and prompted by the USA in particular, and; ii) a consensus that teachers also in our contemporary era of “digital Taylorism” should continue doing some sort of knowledge work (Sorensen, forthcoming).

Clearly, this analysis goes beyond the focus on formal government in historical institutionalism. In particular, the reference to measurement and the sociology of



quantification (see Desrosières, 2002; Porter, 1996) concerns culture as laid out by Robertson and Dale (2015):

*“To speak of culture is to also speak of the ways in which we live and experience our condition through categories, classifications and frameworks for action which shape the possibilities for reflexivity and social practices. It is these categories, classifications and frameworks, that structure and place limits upon the possibilities for human knowing and action, including our inquiries into such processes.”* (Robertson and Dale, 2015, p.154, original emphasis)

### **5.1. Industrial relations in the TALIS ensemble**

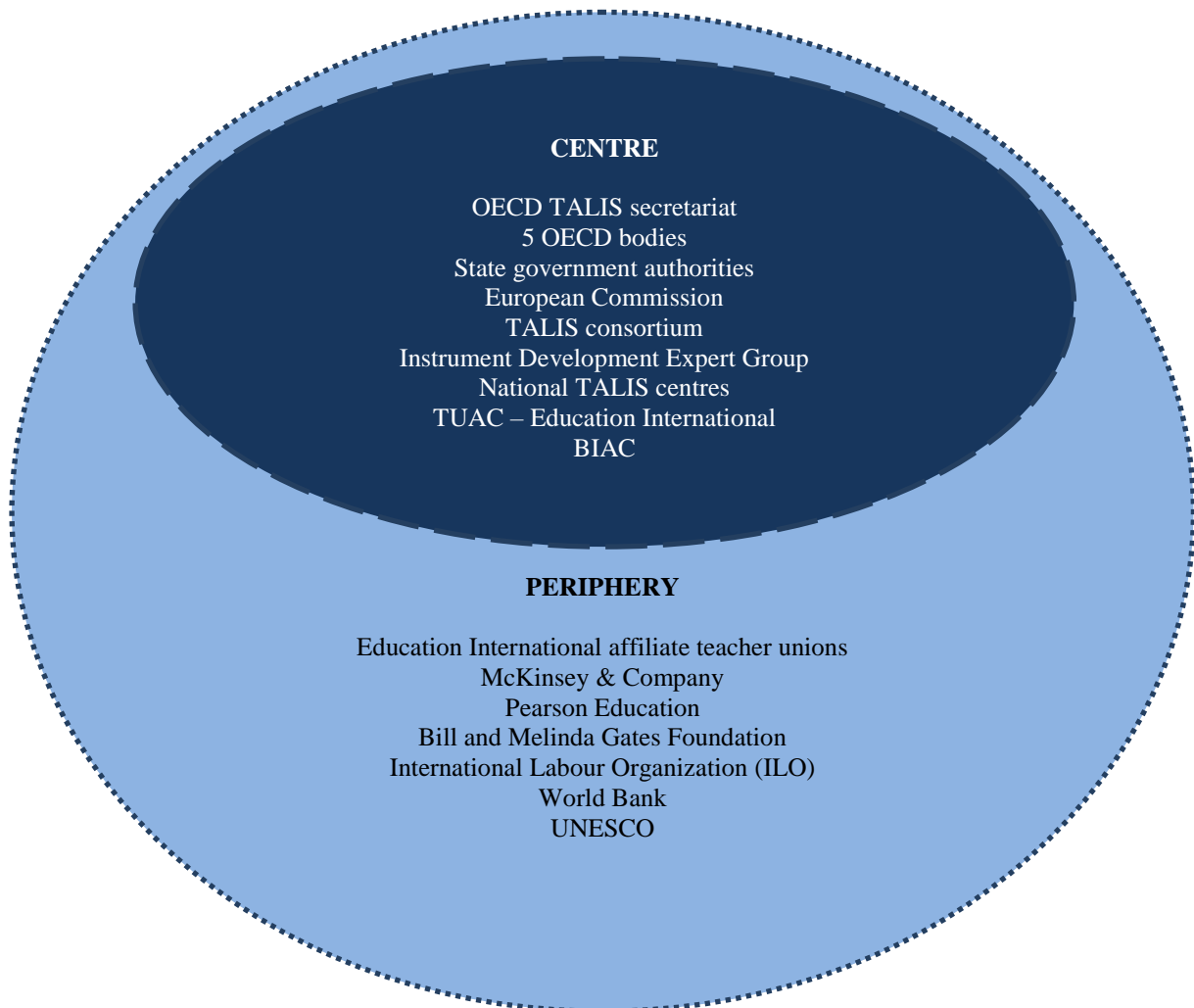
Breaking open the TALIS ensemble with regard to industrial relations shows a different picture than that generated on the basis of historical institutionalism. Going beyond formal institutional regimes and broadening our analytical scope we recognise that there is a range of agencies that are engaged in the debate on teacher quality in the wider landscape of global education governance. As Robertson (2012) points out, some of the most active are private enterprises and foundations. They are not part of the formal institutional arrangements of TALIS but might be understood as being in the periphery of the TALIS ensemble.

In an attempt to draw up this ensemble, we might tentatively distinguish between centre and periphery (see Figure 1). The centre of the TALIS ensemble consists of organisations and bodies involved in the conception, design and implementation of TALIS (OECD 2009, pp.303-305; OECD 2014, pp.434-436; OECD, 2015a). In the periphery, we find other organisations who are active in the policy area but who are not formally involved in TALIS, including also official OECD partners the World Bank, the International Labour Organization and UNESCO (Bill and Melinda Gates Foundation, 2013; Barber and Mourshed, 2007; Coffield, 2012; Mourshed *et al.* 2010; Pearson, 2012; Pearson, 2014; Robertson, 2012; UNESCO, 2014; World Bank, 2011; World Bank, 2013).

The relevance of conceiving TALIS as such an ensemble is for example shown by the series of launch events of results from TALIS 2013 in late June 2014. The official launch took place in Tokyo at an OECD Informal Meeting of Ministers of Education under the headline *“How to Best Shape Teacher Policies? Policy lessons from international comparisons”*. However, during the same days TALIS results were also debated at a live online webinar under the title *“Better Teaching for Better Learning”*. The event was hosted by edu-tech firm Promethean Planet, and connected studios in Atlanta, Boston, London, Paris, Tokyo and elsewhere. The debate included what was labeled global education experts, remarkably dominated by consultancies and foundations based in North America or England,

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such as the Bill & Melinda Gates Foundation, TSL Education (now TES Global), Innovation Unit, and Promethean. OECD and UNESCO were also represented, along with renowned academics such as Michael Fullan and Pasi Sahlberg. It was remarkable that the US Department of Education was the only state authority represented – especially in the light of the US failure in meeting the official response rates among teachers. Finally, John Bangs, TUAC Chair, took part as the voice of teacher unions (Education Fast Forward 2014). Apart from reflecting the efforts of the OECD to extend the global debate on education to teacher quality, the constitution of the panel reminds us that new markets and business opportunities are being created with the deepening of global education governance.



**Figure 1. Centre and periphery in the TALIS ensemble**

This conception of the TALIS ensemble differs from that of the formal institutional regime in historical institutionalism. The distinction between rule-takers and rule-makers does not apply well to the various causal groups constituting the TALIS ensemble, since the mechanism underlying TALIS is based on soft governance, and developments in the contextual conditions are not confined to formal government. More generally, we recognize the crudeness of Streeck and Thelen's (2005) claim that formal institutions change by decision and informal institutions change by cultural evolution. In this sense, the aspiration of critical cultural political economy to challenge more established preconceptions of culture and political economy might indeed lead to epistemic gains.

These points have implications for our critique of the industrial relations in global education governance. A decade ago, Cusso and D'Amico (2005) suggested that there has been an alignment in global education governance around "globalization comparativism" (Cusso and D'Amico, 2005) driven by international assessments of student performance like PISA. The analysis here suggests that the global teacher union Education International has been given a mandate by its affiliates to take part in this alignment in an attempt to shape its outcomes. Thereby, labour becomes entangled with the efforts to create a common space of measurement for the purpose of unifying and administering education systems on a global scale.

From the perspective of critical cultural political economy, and considering the arguments by Farnsworth (2005) and Robertson (2012), this is clearly a delicate balance for labour unions. Due to its nature as a survey, the dimension of competitive comparison is currently not strong in TALIS, but in light of current developments in global education governance the programme might over time add to the proletarianisation and deskilling of teachers, that is, the intensification of labour and loss of control over conception with regard to curriculum, practices and assessment (Carter, 2014; Carter *et al.*, 2010; Robertson, 2000; Sorensen, forthcoming). Five conditions might be singled out here: i) OECD's ambition to link TALIS with the major enterprise of the PISA programme; ii) the strong global drive towards data-driven teaching and learning; iii) the rise of capital in global education governance; iv) current debates in for example the US on reward systems for teachers based on value added modelling; and v) the formal institutional arrangements in OECD where labour could be sidelined by state authorities if deemed necessary.

Yet, on the other hand, survey programmes like TALIS would appear to rely on union support in order to meet the required response rates. We also see that TALIS addresses concepts that Education International has sought to promote, for example teacher self-

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efficacy and distributed leadership (see Bangs and Frost, 2012; Education Fast Forward, 2014). This suggests that while labour might not exercise a strong influence on the framing of the global teacher debate, there is some agreement on how it should be framed. Accordingly, TALIS results are used by teacher unions in their campaigning (Education International, 2014; TUAC, 2014). Moreover, vast majority of state authorities of TALIS participants have insisted on treating TALIS and PISA as separate programmes, and by all accounts, Education International representatives have built constructive relationships with OECD staff and state authorities. This would suggest that labour has managed to make its voice heard.

In the annual International Summits of the Teaching Profession, we recognise a further indication that the voice of labour is present in the soft governance of global education policy-making. The summits have been held since 2011 and are convened by OECD, Education International and state authorities of the host country, with the first two summits held in the US. The summits bring sixteen official delegations of ministers of education and union leaders to the same table, resulting in country commitments and follow up on goals of varying substance (ISTP, 2015).

Yet, we should note that these summits are explicitly framed by what we might label a “PISA regime” since invitations are only extended to “high-performing and rapidly improving countries and regions” as measured by student performance on PISA (Asia Society, 2011, 2015). Moreover, OECD recently launched as a parallel event to the summits on teachers the Global Education Industry Summit. The first summit was held in October 2015, hosted by OECD, the European Commission, and the Finnish government, and brought together state authorities from 22 countries, private sector enterprises as well as representatives from Education International and BIAC (OECD, 2014b, 2015b).

On this basis, the conception of global education governance as a unity of multiple determinations appears viable. Whereas historical institutionalism emphasise the relational character of institutional regimes, critical cultural political economy argue that a key challenge is to identify the emergent properties resulting from the interplay of causal groups that are not reducible to its constituting parts (Sayer, 2001, 2010).

The unfolding relations between state, labour and capital in education governance suggests here an alignment in global education governance centred on the creation of a common space of measurement, not merely for description, but for the further integration of education systems to facilitate the administration of capitalist knowledge economies. The analysis here suggests that state authorities through and with international agencies such as the OECD are driving the expansion of this common space of measurement, encouraged by

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strong support from private enterprises. Labour, too, can see benefits in using international results in their campaigning for teachers' interests even though they are clearly on the defensive currently.

In terms of cultural, political, economic and educational implications, the outcome of the emergent space of common measurement is shaped by developments in the contextual conditions. State authorities with varying influence negotiate the design of this space and how it should be governed through and with the OECD, and other actors like the European Commission and the World Bank, with labour and capital commenting according to their preferences. Capital is overall in a good position since the market in education is burgeoning and appears likely to further expand with the strong drive towards data-driven teaching and learning. Labour continues to advocate a publicly paid school system and that the teaching profession should have status in a changing labour market.

While there are tensions between these priorities of labour and capital, they are not necessarily incompatible. They are struggling about the bias and the public/private mix, including the opening up of international markets, in educational provision, funding, measurement and regulation of education systems, but both labour and capital are effectively contributing to the integration of education systems on an ever expanding scale by their participation in OECD programmes such as TALIS and the international summits on teachers and education industry.

With regard to education and learning, the building of this space is bound to have descriptive as well prescriptive dimensions. Particular concepts of learning, and learning to learn, are promulgated on an ever grander scale, and great efforts are put into arguing the cross-culturally validity in their assessment across diverse locations. In this sense, the stakes are raised concerning the struggles for what learning should mean as an individual and collective property and its cultural, political and economic bias.

### **6. Explanatory critique of industrial relations in global education governance**

On the basis of the OECD programme TALIS and associated industrial relations in global education governance, this paper has discussed the complementarities and potential epistemic gains in bringing historical institutionalism into conversation with critical cultural political economy of education. Historical institutionalism offers a distinctive analytic lens of institutional regimes and this might in empirical research help to clarify the expansive research agenda of critical cultural political economy of education. On the other hand, the latter research agenda is with its stratified ontology better theoretically equipped in

identifying underlying mechanisms and explaining outcomes in education ensembles. Moreover, established concepts of culture, governance, economy, and education, are challenged in the attempt to bring them together in the theory-laden empirical inquiry of education ensembles. In this respect, culture and education are theorised explicitly, in contrast to historical institutionalism.

There are clearly limitations to relying on documents and interviews in breaking open education ensembles and the dynamics of soft governance mechanisms. The case of TALIS shows that the unfolding of soft governance mechanisms is hard to explain without ethnographic methodology including for example participant observation. This methodological point leads us directly to the explanatory critique.

The paper shows that critical cultural political economy of education and historical institutionalism together broadens the scope for explanatory critique. The discussion in the previous sections suggests that industrial relations in global education governance are subject to increasing levels of activity and that both labour and capital are entangled in the creation of a common space of measurement for the purpose of unifying and administering education systems on a global scale.

Industrial relations in global education governance are embedded in soft governance mechanisms, not subject to legal regulation, and there is thus no third party to be called upon. The practical enactment of industrial relations in for example the TALIS programme is characterized by contingency and non-transparency. We should note that contemporary “globalization comparativism” is biased towards regional and global market-making in education. Representing teachers as workers, the global teacher union Education International see no alternative to engaging with OECD programmes like TALIS and PISA, and draw on international data and benchmarking in their advocacy of publicly paid education systems and the status of teachers. In this sense, labour is highly visible. Yet, while they have the right to speak there is not any guarantee that that they will be listened to, and the international summits on teachers and education industry are still a far cry from the tripartite negotiations on an international level advocated by Farnsworth (2005).

State authorities operate through and with the OECD and other international agencies for the creation of a common space of measurement that helps to unify and manage education systems on an expanding scale. This space has descriptive and prescriptive dimensions and is created incrementally, subject to institutional path-dependency as well as political bias. The varying influence of state authorities in the mobilization of this bias needs to be further documented as this has profound cultural, political, economic and educational implications

on a global scale. An entry point for such research might be that the preferences of state authorities depend on the nature of their production and labour markets and the ideologies underpinning them.

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