



THE UNIVERSITY *of* EDINBURGH

Edinburgh Research Explorer

Travelling 'the Caledonian way'

Education policy learning and the making of Europe

Citation for published version:

Grek, S 2015, 'Travelling 'the Caledonian way': Education policy learning and the making of Europe', *Evidence and Policy*, vol. 11, no. 2, pp. 209-224. <https://doi.org/10.1332/174426415X1431430721884>

Digital Object Identifier (DOI):

[10.1332/174426415X1431430721884](https://doi.org/10.1332/174426415X1431430721884)

Link:

[Link to publication record in Edinburgh Research Explorer](#)

Document Version:

Peer reviewed version

Published In:

Evidence and Policy

Publisher Rights Statement:

This is a post-peer-review, pre-copy edited version of an article published in Evidence & Policy. The definitive publisher-authenticated version Grek, S. (2015). Travelling 'the Caledonian way': Education policy learning and the making of Europe. Evidence and Policy, 11(2), 209-224 is available online at: <https://doi.org/10.1332/174426415X1431430721884>

General rights

Copyright for the publications made accessible via the Edinburgh Research Explorer is retained by the author(s) and / or other copyright owners and it is a condition of accessing these publications that users recognise and abide by the legal requirements associated with these rights.

Take down policy

The University of Edinburgh has made every reasonable effort to ensure that Edinburgh Research Explorer content complies with UK legislation. If you believe that the public display of this file breaches copyright please contact openaccess@ed.ac.uk providing details, and we will remove access to the work immediately and investigate your claim.



Travelling ‘the Caledonian way’: education policy learning and the making of

Europe

Abstract

The paper examines the case of education policy learning in Europe and argues that, contrary to dominant assumptions, education is a fruitful area for the analysis of Europeanising processes. More specifically, an examination of the case of the Scottish school inspectorate's 'European' exchanges is particularly useful in relation to the study of international policy communities, their formation and particular workings, as it signals a new level of ‘political work’ (Smith 2009): that of exporting, internationalising and then importing afresh one’s local/national knowledge, once it has successfully gone through the international ‘test’, and is therefore still relevant and future-proof (to the nation). This is exemplified well through the role of these actors who, rather than being Brussels-based Europeans, invariably assume European identity depending on its exchange value –as the paper shows, due to the current political situation in Scotland and the Scottish National Party (SNP) government’s aspiration for independence, that exchange value for Scottish actors is high.

The paper examines education policy learning in Europe through an analysis of the role and impact of the Scottish school inspectorate in Europe since the beginning of the 21st century. The article makes a case for the need to examine new arenas of political action in the building of Europe, such as that of the emerging European education policy space (Lawn and Grek 2012).

The article builds on the questioning of two dominant assumptions that have so far dictated the understanding of how Europe is constructed and mobilised; the first one, methodological nationalism, is rife in the social sciences (Guiraudon 2003; Guiraudon and Favell 2009) and particularly in the field of education (Ozga 2008). Focussing on either the monitoring of quality of education performance, or an examination of pedagogy and classroom practice, education as a policy field has largely been seen as a national ‘matter’, with the infrequent influences originating

from abroad –the latter have either been experienced as system ‘shock’ (as the PISA results were for Germany, for example, back in 2003) or as occasional policy tourism (as Finnish tourist agencies would suggest, given the success of Finland in PISA). Despite those exchanges however, the collective myths of national education systems as distinct and protected from global trends still hold strong – and although there is a diversity of those national narratives, education research across Europe has (in most cases) been united in turning a blind eye to processes of internationalisation and Europeanization. As a result, education research (at least in the Anglophone tradition) has lost much of its creative, inquisitive potential to locate and sociologically analyse a number of its actors who act as brokers between their national loci and ‘Europe’. It thus missed the opportunity to examine policy learning in the field of education as a contested and therefore productive space to understand Europeanisation.

Second, the paper takes issue with the focus, dominant since the mid-1990s, of European integration studies on explaining Europe through a top-down agenda, where ‘Brussels’ and its formal institutions and structures are the foremost and sometimes sole players in the field (Favell and Guiraudon 2011). Hence, other fields of governing activity, such as education, have been persistently considered irrelevant, as subsidiarity would suggest that the national formally disallows any European policy links: recent research has however suggested that, in fact, at least since the mid-1990s the opposite is the case (Ozga et al 2011). Given that education and culture were the initial building blocks of the project ‘Europe’ (see Shore 2000; Pepin 2006; Grek 2008), this sidelining of education — arguably also reflects deeper

and long-standing disciplinary hierarchies, which suggest that some scholarly work derives status and exclusive authority in the field of study through the exclusion of lesser 'others' –in this case, education (again, with exceptions -see Martens 2007)

The paper argues that, contrary to these dominant assumptions, education is a fruitful area for the analysis of Europeanising processes, not only because of its role in nation building in Europe in the 19th c. (Nóvoa 2002), but also and crucially through its more recent transformation from its former institutionalised and ordered sequences into a much more fluid and transnational phenomenon, that of learning (Lawn and Grek 2012). Learning across Europe is vital for the building of the knowledge and more recently the innovation society –it is (or so we are told) a prerequisite for economic growth *and* the cohesion of Europe. I argue here that learning has also become one of the most powerful tools for the governing of Europe, through the increased emphasis on what is more commonly referred to in the literature as *policy learning* (Haas and Haas 1995; May 1992; Bennett 1997; Raffe and Spours 2007; Steiner-Khamsi 2004). Either through meetings (such as those I discuss below) (Freeman 2008) or through the more direct and unforgiving comparison of country statistics (Grek 2009), learning from and with others is one of the leading modus operandi for the 'soft' governance and governing at a distance of the European peoples (Lawn 2003; Clarke and Ozga 2011). The paper discusses this particular aspect of the benefits of (policy) learning and examines its rise within the field of education governance through a focus on the fairly recent upsurge of the exchanges amongst European school inspectorates: more precisely, it looks at the role of the Scottish inspectorate in this policy arena.

The travelling inspector is indeed a new phenomenon –although education in Europe has always ‘travelled’ (Lawn 2003), inspectors were firmly rooted and derived influence from their local and authoritative standing as education ‘connoisseurs’. Indeed, in recent years, inspectors increasingly appear as one source of expertise among many:

Inspectorates are today only one among many institutions and organisations that produce evaluative material on schools, teaching and learning. The place, role and status of inspectorates can no longer be taken for granted. The quality of their products and services will increasingly be compared with other sources and could be challenged by other evaluators.... Failing this challenge will endanger the future of inspectorates, as they will be failing to deliver the information and analyses that our societies need (SICI 2004; 18).

In order to examine why European inspectors are leaving their local ‘knowns’ and are now voluntarily and actively looking into new ‘un-knowns’, the paper focuses on the role of the Scottish school inspectorate, formerly known as Her Majesty’s Inspectorate of Education (HMIe), now reverting to their pre-2000 title of Her Majesty’s Inspectorate (HMI) and currently part of a larger integrated organisation, ‘Education Scotland’, whose remit and function I will discuss later. More specifically, the paper argues that an examination of the Scottish case is particularly useful in relation to the study of international policy communities, their formation and

particular workings, as it signals a new level of ‘political work’ (Smith 2009): that of exporting, internationalising and then importing afresh one’s local/national knowledge, once it has successfully gone through the international ‘test’, and is therefore still relevant and future-proof (to the nation). This is exemplified well through the role of these actors who, rather than being Brussels-based Europeans, invariably assume European identity depending on its exchange value –as I will show below, due to the current political situation in Scotland and the Scottish National Party (SNP) government’s aspiration for independence, that exchange value for Scottish actors is high.

The paper uses discourse analysis of speeches and texts produced by the Scottish inspectorate over the last few years, in addition to interview material with key actors that have been part of this new ‘trend’ –all the data are derived from the ESRC funded ‘Governing by Inspection’ project, a comparative research study which examines the field and developments of school inspections in three countries, Scotland, England and Sweden¹.

a. Scotland: contextual background and structure of the paper

We start our journey on the new ‘Caledonian way’ –where else but in Scotland and the recent changes in its school inspection regime, changes that, according to their advocates, have come at a ‘time of opportunity’ when a number of developments have arguably reached a culminating point; first, a strong nationalist government

¹ Governing by Inspection: School Inspection and Education Governance in Scotland, England and Sweden. ESRC (RES-062-23-2241) bilateral project with the Swedish Research Council. (2010-2013).

offering a stable political landscape; the slow implementation of the long-debated Curriculum for Excellence; the publication of the Donaldson and the McCormac agendas regarding the professionalisation of teachers; and the growing recognition and travelling value of the Scottish ideas on school self-evaluation abroad. This time of change offered Scottish education, according to a senior officer, the chance to create a new agency, Education Scotland, an agency that would foster the creation of a *learning* education system; its remit is no less than support and fostering of the formation of professional peer learning communities by the inspectorate through their adopting the role of 'the knowledge brokers, and knowledge managers, and knowledge transfer agents' (interview 21.10.11). HMI is one of the key agencies joining up to create this new organisation, therefore an examination of Education Scotland is central to the explanation of how the Scottish inspectorate understands and describes itself and its work not only inside Scotland but also beyond. Indeed, it is through this increasing international interest in the Scottish inspection system that its developers seem to derive a fair degree of confidence in proclaiming 'the next generation of school improvement' as being generated in Scotland.

We begin with a discourse analysis of the 'story' of the Scottish school quality improvement movement, as told by some of its key policy actors, intended for and indeed repeated to both national and international audiences: this, interestingly, is a story of 'roads not taken' (cf Robert Frost's famous poem) –namely, of those policy choices prevalent 'south of the border', which arguably were not followed in Scotland (or at least not followed to the same extent). Instead, according to the story-teller, as we see, Scotland made a long term investment in building a different

path, that of a self-evaluation, a path which is now ready to be followed. This is a story of 'us' and 'them', clearly decorated with national myths and symbols cropping up in presentations not only abroad but also domestically: the story of 'the Caledonian way', embellished with Scottish flags and thistles and pointing to a future that 'is not what it was'. It largely represents the argument for the creation of Education Scotland, the narrative of which is essentially a narrative of the new 'why' and 'how' of school inspections in the country. In order to present it, I use material derived from two keynote speeches in Scotland and abroad; one given by the acting head of Education Scotland at the Scottish Learning Festival in Glasgow in September 2011 [hereafter HES 2011] and a relatively older –but very similar- one, given by an ex-HMIE senior chief inspector speaking to a French audience of inspectors in Paris in December 2008 [HMIE 2008]. I continue with a focus on the particular aspects of the Scottish inspectors' international activity through material derived from interviews with key actors who took part in it, and move on to present the findings from a brief ethnographic study of a week-long training event of inspectors from Eastern Europe in Scotland in February 2012. Finally I conclude with a discussion of the main elements and key guiding principles of the work of Scottish inspectors as international actors as they appear in these accounts and attempt an interpretation of this work –both for what it possibly means for those receiving it, but also and crucially for its teachers, the Scottish HMI.

b. Scottish inspections: the 'next generation of school improvement'

Education Scotland has been described as the result of the need to integrate previously separate functions to drive forward the new Scottish approach to inspections. The origins of the change were:

‘much more about the philosophy of improving education rather than the cuts...frankly they were reducing the budgets anyway, so we’re not reducing the funding anymore than we would have done if we’d carried on as two organisations’ (HMIE 2).

The argument about the integration of services saving finances is quickly dismissed; this is not about reducing budgets, it is rather a philosophy and the old/new approach to Scottish education. In order to explain where the system finds itself at and where it is moving towards, a history of school improvement is given by the speaker, based on Scottish and global experiences. According to his account (HES 2011), [dominant in the explanations and descriptions of the new Scottish inspection system], school improvement ideas and practices went through three different waves of change; the fourth could potentially be a version of that proposed and now implemented by Education Scotland as ‘the next generation of school improvement’. What is interesting in the construction of the story is the numerous subtle nuances but also some finger-pointing towards the English side of the border; this is a story of what ‘others’ did, but Scotland did *not*.

Very briefly, following this account, the story of school improvement begins with *the first way*, starting post-war and lasting until the 1970s, which was characterised

mainly by ‘innovation and inconsistency’: the rise of the post-war welfare system, the comprehensive schooling movement, and the relative open expansion of education were some of its main characteristics. This phase, according to the narrative, was seen by many as resulting in an almost unregulated profession, which led to extremes and wide variations in performance. Thus, it was followed by *the second way*, which saw a more general push to get a better grip on quality and consistency: these were the Thatcher years up to the 1990s, with a very heavy emphasis on goals and performance levels, a lot of ‘top-down’ prescriptive curriculum and practitioner guidance, and all these again mainly emanating ‘south of the border’. Interestingly, the phrase is repeated and used consistently as an alternative expression to ‘England’, whereas when similar accounts are given abroad the references are explicit, with quite direct and bold opening lines such as ‘this is Scotland. Everything you know about England, forget!’ (HMIE 2008).

To return to the second way, education in the Thatcherite era was mainly associated with the high-frequency, high-stakes inspection and public reporting of results, or as the narrator describes, ‘the “league tables” syndrome’: a notion of standardisation of quality combined with a market model which was thought to be raising quality across the system. The realisation that this might have been non-productive and disempowering in many ways led to *the third way*, a familiar term associated with the Blair years of ‘performance and partnerships’ ; this phase aimed at freeing up elements in the process while still keeping a very tight view of measuring performance and retaining much the market style competition. More autonomy and responsibility was given to local providers but the strong high stakes public

accountability for results remained strong (though weakened in Scotland by the absence of national testing and league tables). Although it is not explicit, once again, the speech focuses on education policy developments in England rather than Scotland over the last 30 years.

c. ‘But we...’: The Caledonian way

‘But we, as a lot would agree, never went (to) extreme (s) down the second way or the third way: our history reflects this historical journey but *less extreme and more measured*’ (HES 2011, my emphasis)

The change of tone here is dramatic –this was a story of hard regulation and top-down agendas dominant in policies in England. Although the speaker acknowledges the Thatcherite developments of the Michael Forsyth era, the 5-14 curriculum, or the fact that parental choice was ‘mildly’, as he put it, encouraged, he also emphasises the Scottish focus on education as a common good, with less market competition, less erosion of trust and no devaluing of the teaching profession. According to him, Scotland (‘but we...’) not only did not go down the English way (‘south of the border’), but actually became ‘pioneers’ of changes that pointed towards the start of a new era; here, the example of Scotland being at the forefront of curriculum design and assessment is given. In addition, the Scottish inspectors, according to this account, became pioneers of the self-evaluation movement, which resulted in the Scottish education system and its values becoming well-known internationally. This almost becomes a triumphant moment in the speech, which

comes in stark contrast to the story of hard regulation and the constant, direct or less direct, finger-pointing to England. In a typically Scottish mode however, the exuberance is quickly moderated and contained: the performance of Scotland against international standards, namely in the Programme for the International Student Achievement (PISA) and more generally in the OECD data, is not very good news:

‘This raises question: where do we go next? We are good but not outstanding...Inspections suggest few critically underperforming schools but substantial numbers are ‘coasting’....This is a generally good looking system but it has a lot more potential’ (HES 2011)

Interestingly now, for the first time, the spectrum of comparisons and references broadens widely; there are references to countries such as Slovenia and Lithuania with which Scotland compares directly in terms of equity, or others, such as Norway, ‘a good comparator country’ to aspire to. The English example is quickly left behind.

This is where self-evaluation becomes key for answering the question ‘where next?’: ‘we’ve invested a lot in self-evaluation and we should be capitalising on this now.’ The new inspection system is meant to be intelligence-led, proportionate and operate in a ‘performance-coaching’ way. Apparently, ‘there is role for transparent performance data, but you need to use data that is very intelligently benchmarked and reported’. What is interesting in this account is that this is not presented as a solution to all systems and schools –this is the ‘good to great’ agenda, applicable to

Scotland which by international standards is performing well, whereas it would and could not apply to failing systems elsewhere: this is an interesting point, as it appears to have emerged relatively recently as a result of the Scottish teaching of self-evaluation abroad.

However, this is only a first stage in the change process. 'Good to great' can and should lead to the 'great to outstanding' agenda which is the vision for Scottish inspection and which, in fact, although presented and discussed widely at the national and local level, is a less common theme in presentations abroad. This is seen as a very progressive programme of reform based on peer-led learning and the creation of professional learning communities with the aim of decentralising learning and promoting innovation. The role of the inspectorate in this system is to 'gather intelligence, advise and intervene' to support a 'learning system through which the professionals at the front line create the forward planning and the forward movement'. The motto of the new Scottish inspection system is 'to live the talk' of being self-evaluative, hence to constantly be looking at international benchmarking and the best systems elsewhere. According to this new agenda, the role of the inspectorate is to build from the bottom, invest in capacity for front line professionals and steer from the top in a light way:

'This is no micro-management, quite the opposite of that.... Education Scotland has the role of choreographing and managing careful balance of pressure and support from the sides' (HES 2011)

This is an innovative agenda rarely discussed in international meetings and exchanges –although, for example, hints are given in regard to new developments, such as the ‘validated self-evaluation’ pilot scheme, it is quite obvious that the Scottish inspectorate has become more careful about the messages it sends: self-evaluation is a long-term investment which requires substantial persuasive and other work on the ground. This muting of the most current changes while abroad is interesting however: it suggests a possible slow maturation of these international exchange processes, through which the Scottish teachers/inspectors become more and more aware of the need to adapt themselves to whoever they are working with –teaching in these occasions is not simply transmitting. It involves a lot of understanding and getting to know others. The next section discusses some of these processes, which were novel at first, but are now almost routine travelling realities for the HMI.

d. Scottish inspectors’ views on going international: ‘living the talk’?

‘The Scottish inspectorate is looked upon as one of the leading if not THE leading inspectorate in Europe.’ (HMIE1)

In this paper I will not be going into detail in regard to the specific influence of the Scottish inspectorate through its involvement with the Standing International Conference of Inspectorates (SICI) and the spread of its self-evaluation practices abroad (see for example Croxford, Grek and Shaik 2009; Lawn and Grek 2012). Rather, I prefer to focus on the views of the Scottish inspectors about these kinds of

developments, developments that appear to be increasingly requiring a great deal of their time and attention. For example,

Here in Scotland HMIE has an overwhelming range of requests to engage in bilateral work, get visitors to go out and do training. The Scottish inspectorate has actually for example done a three year project to train the Czech inspectorate wanting to move from the way it had perceived and had operated when it had a Communist government and now wanting to move to a different kind of inspection. We've done quite a lot of work with Portugal and other countries training inspectors. The Dutch tend to do work of that kind. Ofsted come and go a bit. (HMIE1)

The next section focuses more on what such training events usually entail –however, the fact that the inspectorate now compiles and counts a considerable number of both outward and inward visits for the purpose of exchanging and often simply training other European inspectors is interesting in itself. For example when asked about European exchanges, education actors have lists of travel itineraries to show:

I've pulled together a couple of lists –the first one is folk who have come to visit us from overseas. One is over the last couple of years and also giving you the last couple of years before that... That's the second list-the second list is where we have made inputs to training events-now those can be either at a SICI workshop or a general assembly or in some cases for example in Romania where SICI are effectively contracting us along with

other inspectorates from Europe to do support training in different countries. Romania has been the most recent... But the money for Serbia is coming in from the World Bank ... One of the most interesting ones (on the list) was a Dutch inspector over for about a month as a kind of internship- they were very keen to see how we operated within Scotland (HMIE2)

In fact, training events are now organised and follow specific formats. They are not one-off events –their frequency requires that specific inspectors are in charge of these international activities, which very often are also led by ex-senior inspectors who have now moved on to occupy key positions at SICI, such as in its ‘Academy’. The SICI academy has the specific remit to organise the teaching and learning of inspectorates across Europe: ‘At least now we are more clued up and actually charge for these events –for a very long time we were doing all this work for free!’ (HMIE5). Teaching the Scottish inspection system not just in Europe but also beyond, is not at all an add-on to the usual work of the former HMIE, and not even an area of international activity that simply covers a growing need to appear international; it has become routinised, everyday labour:

There’s a more general presentation-the ‘bog standard’ presentation if you like-that we tend to give in the place of self-evaluation in particular- the Scottish approach to school improvement....and then there’s another one here which is more specifically delivered by one of the local authorities....And then this document here which we produced about 2 or 3 years ago about improving the curriculum through self evaluation- there’s

been quite a lot of interest in that, so that document has been spoken to in some of these events as well, about how you use self-evaluation in order to bring about curriculum improvement (HMIE2)

Another aspect of this international activity which has also to some extent become routine, as we saw above, is describing the Scottish HMIE in contradistinction to the 'English':

And one of the first things I always say to visitors or visiting inspectorates coming to Scotland is 'You'll have heard about Ofsted, we are very different to Ofsted' and I've said that to colleagues in Ofsted as well-and they acknowledge that (HMIE2).

In fact, it appears that, at least during the last decade, the more Ofsted became introverted and less active and interested in the SICI work or other exchanges, the more the Scottish inspectorate was gaining ground. And while the Scottish self-evaluation manual 'HGIOS' [How Good is our School] 'has been translated into all sorts of languages including Finnish', English policy actors became more and more solitary and isolated at home:

Well...essentially Ofsted had nothing to learn from anybody else and operated very much within its own shell... would tolerate missionary work if you like but ... not at all interested in what was happening outside

the boundaries of England... [For OFSTED] self-evaluation was not part of the solution but part of the problem. (HMIE1)

Finally, an interesting theme that continually emerges in discussions about this work of the Scottish inspectors abroad, is not only what they offer to their foreign colleagues but also the learning that they do. This was a continuous element of the training event that is described below; how others do inspections and what is the experience of other systems is a dominant theme in such events. Rather than simply adopting the didactic style of the teacher (although this does occur at times), there is a sense that international experience offers invaluable policy lessons for home. Some inspectors or ex-inspectors even learn the language of the countries they visit most, like Finland for example. The organiser of the training event described below was able during the meeting to understand the conversations in the language of the visitors and help the interpreter partly with difficult terms (more on this later) –and when she is in Spain or Germany, she presents Scottish inspection in those countries' native languages:

I think they are (Swedes), in some ways, closer to our way of thinking than Ofsted would be, say. The Skandics actually, we're quite interested in. Norway has spent some time with us. They had an OECD review in Norway last December they have a directorate of education and training in Norway which is an organisation, an agency of government very like ours, actually – there's a sense in which we feel we're almost evolving towards similar territory from different starting points (HMIE3)

Ontario is probably our biggest influence—we had Ben Levin over to our conference to talk to us, and the Skandics we’ve mentioned, and New Zealand a little bit... Holland’s another –and we talk to Holland quite a lot and we’ve done joint work with them. (HMIE3)

The next section is an ethnographic account of a four day training event in Edinburgh, offered to a group of 15 Eastern European inspectors. The visit was part of a larger project, co-funded by the Ministry of Education in the respective country and the European Social Fund. The beneficiary of the project is a small county Inspectorate, and the project partners included the central national Inspectorate, a private association and SICI. The project began in 2010 and it runs for 34 months. Its ‘target group’ is 80 inspectors in this Eastern European country, in addition to 1000 headteachers. The training course is only part of this larger project and is

‘organized together with foreign expert lecturers, appointed by our partner Standing International Conference of Central and General Inspectorates of Education – SICI, and it includes 4 parts:

- Module 1: Inspection, leadership and management;
- Module 2: Leadership and management: planning for improvement training;
- Module 3: Leadership and management: Means of self-evaluation/
Evaluation of self-evaluation;

- Module 4: The school within its community/ Promoting training for improvement through inspections’.

Being a participant observer during this training event was an illuminating experience, as it cast light on many aspects of inspection work, its core content and practices, on the personalities and ways of communicating of the inspectors’ themselves, and finally on the reactions, challenges and cultural encounters that the Eastern European group experienced during their time in Scotland. The following text includes snapshots of the event, alongside small talk during lunch and coffee breaks –since none of the foreign inspectors spoke English apart from their interpreter, there was an opportunity to have brief discussions with the organisers during those times.

Day 1. The meeting starts around 9:30 in a central area in Edinburgh. The meeting room consists of two round tables around which we sit. The room is very full with all 18 of us.

‘Welcome to Scotland!’ is the first salute in the room by one of the project organisers –and an attempt to say a couple words in the visitors’ language. She goes through the programme for the week suggesting that the timeframe is tight. However, progress is slow as an interpreter is there who needs to translate all that is said; apparently only one member of the group has some English. It is obvious from the beginning that, despite the heavy workload, all that was said would be expressed in single sentences at most, as the interpreter required; thus, in the less than ‘normal’ circumstances of the necessary translation,

continuous narrative quickly turned into a series of assertions about Scottish education, its system and its inspection, which made it even more intriguing for those unfamiliar with it. This is perhaps because causality is inherent in a narrative; it is a story told. On the contrary, single, broken statements need to be taken as givens, until the speaker is allowed to bring them together to a logical conclusion –but in this situation they were often unable to.

The Scottish inspector continues by handing out post-it notes; inspectors are meant to write questions and comments on them and then stick them on the wall; there are quite a few confused looks around, as this appears to be a quite unknown practice. It does not seem to be standard practice among professionals in the country in question, and certainly not among inspectors. The meeting however goes on.

The first speaker is a senior HMIE. She begins by saying *'First thing and important to say, we are not England'*. Noisy laughter follows the comment –apparently a good ice-breaker. The speaker continues: *'This is a separate education system, and this is very important to us and it should be to you too. Education is a devolved power. The Scottish Parliament decides on it, and then it is devolved further to these 32 local councils. It is really important to understand the role of these councils –they are the providers of education. They employ the teachers and have their own policies for education'* (HMIE5). She goes on to explain the basic structures of the Scottish education system but there is already some noise and whispering in the room –something is wrong. A hand is raised, there is a question: *'So isn't Scotland subordinate to the Queen and the Prime Minister?'*

The question is followed by at least a 15 minute discussion on the issue of devolution. The visiting inspectors don't seem to grasp the political situation in Scotland – but the time is tight –we need to move on. Back to the presentation:

The primary school takes students from the ages of 5-12 and secondary schools 12-18 year olds. The maximum number of students in the class is 33.

-33? One of them asks. Now there is a lot of noise in the room. –So could there be a class with only 1 student?, someone else continues. The inspectors start speaking to one another –this seems to be really interesting to them. The interpreter can't keep up so she stops translating. We (English speakers) have no idea what they are talking about but it is obvious that they are surprised with the high student number per class. At the same time mobile phones continue to ring –they have never really stopped from the beginning of the meeting. The speaker is just at slide 2 of a 25 slide powerpoint presentation. She needs to leave at 11 and it is obvious she is getting impatient.

The first session continues with lots of questions from the audience – interestingly very few of them on self-evaluation itself. Most interest is shown in regard to understanding the system: this, it is obvious from the reactions, is a peculiar place –one thing they all agree, things in Scotland are 'different, very very different'. The speaker manages to rush through her presentation answering all sorts of questions regarding the Scottish system. Time for a break.

The ex-HMIE/SICI inspector (from now on 'Mary') approaches me with her cup of coffee and biscuit; she mentions that these are all subject inspectors, not management inspectors, so they are here to extend their skills. Another group

from the same country is in Sweden at the moment taking a similar training visit. Apparently that meeting is not going very well –the weather is worse there (she laughs and the passing interpreter laughs with her). She was in Mexico last week; it was part of a big OECD project with 24 participant countries and 12 study visits –‘it is fascinating. Self-evaluation is everywhere’. Our discussion is interrupted as the interpreter approaches Mary again –she has a question: ‘How do I translate improvement? Is it about career progression?’ Mary tries to give a quick answer but the interpreter looks more confused than before. She nods and goes away – it is time to go back in.

It is Mary’s turn to speak. Interestingly she understands some of the visitors’ language. As they start talking to one another, she nods. She speaks to the interpreter explaining the difference between their national inspectorate and the former HMIE. She speaks really slowly and answers all questions in detail. Her style is very didactic, almost patronising, but seems to be going down very well. More and more questions come to her –so what do you mean by improvement? What do you mean by ‘support and challenge?’ Mary replies but the visiting inspectors become more forceful with their questions: ‘No, I mean in practical terms, give us examples’ (The interpreter winks at me and smiles). Mary remains calm and composed –she continues slowly and now talks about ‘ownership’. The interpreter now asks ‘and what do you mean by ‘ownership?’ Mary gives an unlikely answer: *‘It should come from within you, not somebody from outside, you own it. Think of an alcoholic or a drug addict, the first step for*

them is to recognise themselves that they want to improve. That's the principle'.

The interpreter looks at me and smiles again.

Mary continues: 'Do you remember the example of the ugly duckling thinking it is a swan? Self-evaluation is not easy. I've just been to Mexico. I was part of an OECD group looking at the evaluation of the system in Mexico. What they did was to take materials from Scotland and translated them into Spanish and suggested that all schools do that. What happened? Nothing really. Any system has to be supported not just by printed material but face to face discussion and good examples. (She brings Slovakia in as another example) You have to have an extended system of checking how good self-evaluation is. And that is one of the most important points in Scottish inspection now –the evaluation of the quality of self-evaluation. You tried to create one yourselves, remember? It is very difficult.'

Although these field notes could be extended considerably, what is attempted here is to give a flavour of the nature of the meeting – some of its difficult but also some of its more comical moments. In essence, this meeting, which was to train subject inspectors (ie. Inspectors of History, Maths etc) as management inspectors (ie interested and knowledgeable in leadership training), turned into a meeting of exploration and of entering a new professional and policy world. The East European Inspectors were faced with a system very different from theirs, which apparently – despite startling contradictions (high classroom student numbers, high truancy numbers, relatively good PISA results etc) – worked better than theirs (since they were the learners and not the teachers). From the point of view of the

teacher/inspectors, the Eastern European visitors seemed very different from them, too; the Scottish Inspectorates use of common language and common terms to describe the system at all levels (from the HMIE to the local authorities' quality managers to the head-teachers in the schools they visited) was so striking, that it almost gave the impression of a script, rather than a story; a script well-rehearsed and repeated time and again during the 4-day visit. This was quite evident in the visiting inspectors' attempts to get 'behind' the 'keyword' terminology the Scottish inspectors were using (terms for example, like 'improvement', 'excellence', 'ownership', 'support and challenge'). When they realised that they would not, some of the visitors became tired and eventually they all resolved into capitalising on their journey as tourists –they asked for and finally managed to reduce the meeting workload and organise free time for sightseeing in Edinburgh.

e. Discussion

This is a preliminary discussion and interpretation of the policy teaching and learning activities of the Scottish inspectorate: it builds on work which began as part of the Fabricating Quality (ESRC funded, RES-000-23-1385) project, where we identified this activity as unique in Europe in terms of its volume and frequency over the last decade (Ozga et al 2011). 'Governing by Inspection' has allowed for further exploration of the field, which is continuously growing especially since SICI, the main European agency moving this agenda forward, has established a new Academy for the training and international exchange work of inspectorates. In the meantime, the former HMIE has not only increased this travelling activity but also expanded it

beyond Europe with networks and collaborations in places such as Mexico or even Afghanistan (HMIE4).

However, what does this all mean for the study of policy learning in Europe and indeed for the building of Europe itself? Through our work on the Europeanising and converging effects of the quality assurance and evaluation processes in the field of education, we have been constantly confronted by actors who deny that these effects exist, yet their actions and practices emphatically and repeatedly confirm the opposite. Nonetheless, the numbers of travelling inspectors around Europe are growing, as well as their acknowledgement of the benefits and mutual learning of 'best' practice that this travelling produces. What, then, is different about the Scottish inspectorate? What is distinctive about inspectorates in Europe in general, since they have become so mobile and receptive to lessons from abroad? Why do they advertise and pursue these exchanges when others stubbornly do not? We argue that the case of the 'travelling inspectors' confirms our view of education as a valuable policy area for the understanding of Europeanization: it illuminates the significance of learning not only as a resource for economic and social cohesion, but crucially as a governing mechanism for the travelling and exchange of policy at the level of the international. The 'answer' lies in precisely what the head of Education Scotland said – 'we need to live the talk'. Talking about self-evaluation and the creation of peer learning communities at the level of school needs to reflect similar work at the very top –and this is precisely what this inspectorate has been pursuing internationally over the last decade.

The Scottish study could then be described as *prototypical*: based on the experience of doing work with this case and in this field over some years now, I might speculate that studying this early example may help us understand a phenomenon of growing significance not only in the field of education governance, but in governing terms more generally. I would also argue that the contrast with an introverted Ofsted does not weaken this argument—on the contrary. As I discussed elsewhere (author 2012), (most) European inspectors, under the threat of data and the emergence of numerous new accountability mechanisms and agencies, came together and formed a new field of collaboration and exchange using SICI as a platform. Applying Bourdieusian terms, SICI could then be seen as a field of actors who constantly negotiate and push their own agendas forward: the field changes as it develops, reflecting the political situation at home. According to Bourdieu, the logic of positionality is what gives the notion of the ‘field’ meaning (1993). In other words, the positions occupied by the different agents in the field, their advances and withdrawals, relate to their efforts to achieve distinction within this field as an expression of their professional, educational, or other interest. In terms of the Scottish inspectors, the distance of ‘Europe’ from their everyday professional reality at home (a reality constantly squeezed as they were recently integrated with other agencies and functions) requires a willingness to take a risk, to go international. Meanwhile, the structure of the field is neither static, nor does it change in any systematic way. On the contrary, it is endlessly reformulated according to the agents’ struggles for recognition and improvement of their situation. Agents use the force of their capital- economic, social, cultural, or in the case under examination, knowledge capital- to raise their game and advance their front. Nevertheless, it is

the *relational* nature of these advances that gives the field its explanatory significance; for example, Ofsted used to be more far more involved in exchange work –they used to collaborate with the Dutch, another leading inspectorate in Europe. When they began withdrawing, another actor advanced its position: Scotland. Reflecting and working with the political situation at home (a strong nationalist government), they have begun to consistently construct themselves and their choices in contrast to the failed -as they see them- policies in England, while working more with ‘Europe’ and beyond, spaces of increased significance as loci of exchange for the independence-aspiring nation.

However what explains their success and the relative lack of recognition of other inspectorates equally involved in such activities (such as the Dutch or the Swedes)? Their answer is the use of a common language: ‘what is important is that all people in the partnership speak the same language and understand one another’ (HMIE6). It appears that they do the same abroad, as they have developed a specific framework for delivering these training events; they are organised and consistent. In addition, Scotland is a small system, often seen abroad as the UK underdog and therefore less threatening than Ofsted. Being small reaps additional benefits: as people are more easily connected at home, they maintain a more coherent and stable profile abroad, which is a vital ingredient in not only establishing but crucially maintaining network relations. Moreover, they learn from the processes themselves and appear humble: they learn the languages and customs of their ‘pupils’ and they also allow space for more ‘touristic’ touches to the visits in Scotland as well – they are professional but humane. Finally, and perhaps more significantly, they have now gained an

unprecedented momentum in these international travels which does not seem likely to wane in the immediate future. 'The Caledonian way' will probably be a long one.

To conclude, education policy learning in Europe, as the case above clearly illustrates, points towards two significant and interdependent directions which were discussed at the introduction of this paper. First, the paper highlighted the fallacies of methodological nationalism in research, which is either blind to international policy work, or at the very best, looks for 'clean', direct cases of policy transfer and borrowing, when, in fact, the reality and 'fields' of these exchanges is far messier and under constant flux. The analysis above is evidence of a field of policy work that is in constant activity, especially at a time when data and quality indicators for education systems in Europe signify substantial convergence of policies for the knowledge and innovation society. The case of Scotland in particular shows how 'Europe', rather than existing as a separate and democratically deficient political entity, is in fact continuously fabricated and capitalised on in the political scene at home -in other words, and using the usually problematic language of 'levels', rather than diminishing in its role and power, it is in fact the 'national' which makes Europe happen. It is in the examination of the national policy spaces that one finds the most useful and enlightening examples of Europeanisation in action.

Second, and for the reasons above, the Scottish case signals a need to divert the analysis of Europeanisation away from the well-trodden pathways in the corridors of the Brussels European quarter of glass towers to more local and apparently peripheral spaces. A sociological examination of the interaction of international

actors who come together in such policy and physical spaces could move the European studies agenda from the more top-down, relatively obvious and by now rather stale examination of 'formal' European processes, to other arenas which now take advantage of their knowledge and learning potential –or, at least, it is only now that we acknowledge them as such. Given all the above and paraphrasing Monnet, if we were to begin the study of Europe all over again, why would one not start from education?

References

Bennett, C. (1997) 'Understanding ripple effects: The cross-national adoption of policy instruments for bureaucratic accountability' *Governance*, 10, 213–233.

Bourdieu, P. (1993) *The field of cultural production*, Polity Press.

Clarke J. and Ozga, J. (2011) 'Governing by Inspection? Comparing school inspection in Scotland and England', Paper for Social Policy Association conference, University of Lincoln, 4-6 July 2011. At http://www.social-policy.org.uk/lincoln2011/Clarke_Ozga.pdf [2 June 2012]

Croxford, L., Grek, S. and Shaik, F. (2009) 'Quality assurance and Evaluation (QAE) in Scotland: Promoting self-evaluation within and beyond the country', *Journal of Education Policy* (Special Issue), 24, 2.

Favell, A. and Guiraudon, V. (2011), *Sociology of the European Union*, Palgrave MacMillan.

Freeman, R. (2008) 'Learning by meeting', *Critical Policy Analysis*, 2(1): 1-24.

Grek, S. (2008) 'From symbols to numbers: the shifting technologies of education governance in Europe', *European Education Research Journal*, 7(2), 208-218

Grek, S. (2009) 'Governing by Numbers: the PISA effect in Europe', *Journal of Education Policy*, 24, 1, 23-37.

Grek, S. (2012) "The rise of the European inspector: embodiments, inscriptions and the new acts of inspecting 'together'", draft paper.

Guiraudon (2003) 'The constitution of a European immigration policy domain: a political sociology approach', *Journal of European Public Policy*, 10:2,263-282.

Guiraudon, V. and Favell, A. (2009) 'The Sociology of the European Union. An Agenda', *European Union Politics*, 10/4, 550-576.

Haas P M. and Haas E. B. (1995) 'Learning to Learn: Improving International Governance', *Global Governance*, 1, 255-285.

Lawn, M. (2003) 'The "Usefulness" of Learning: the struggle over governance, meaning and the European education space', *Discourse: studies in the cultural politics of education*, 24 (3), 325-336.

Lawn, M. and Grek, S. (2012) *Europeanising education: governing a new policy space*, Oxford: Symposium Publishers.

Martens, K (2007) 'How to become an influential actor –the 'comparative turn' in OECD education policy', in K. Martens, A. Rusconi and K. Lutz (eds) *Transformations of the State and Global Governance*, London: Routledge, 40-56.

May P. J. (1992) 'Policy Learning and Failure', *Journal of Public Policy*, 12, 4, 331-354.

Normand, R. (2010) 'Expertise, Networks and Tools of Government: the Fabrication of European Policy in Education', *European Educational Research Journal*, 9 (3), pp. 408-423.

Nóvoa, A. (2002) 'Ways of thinking about education in Europe', in A. Nóvoa and M. Lawn (eds) *Fabricating Europe: The formation of an education space*. Dordrecht: Kluwer Academic Publishers.

Ozga J (2008) *Governing Knowledge: research steering and research quality*, *European Educational Research Journal*, 7(3), pp.261-272.

Ozga, J., Dahler-Larsen, P., Segerholm, C. and Simola, H. (eds) (2011) *Fabricating Quality in Education: Data and Governance in Europe*. London: Routledge.

Ozga, J., Grek, S. and Lawn, M. (2009) 'The New Production of Governing Knowledge', *Soziale Welt* 4 353-371

Pépin, L. (2006). *The history of European cooperation in education and training: Europe in the making – an example*. Luxembourg: Office for Official Publications of the European Communities.

Raffe, D. and Spours, K. (eds) (2007) *Policy-making and Policy Learning in 14-19 Education*, London: Bedford Way papers, Institute of Education.

Robertson, SL & Dale, IR. (2008) 'Researching education in a globalising era: beyond methodological nationalism, methodological statism, methodological educationism and spatial fetishism', in Resnik, J (Ed.), *The Production of Educational Knowledge in the Global Era*, pp. 19-32.

Shore, C. (2000) *Building Europe: The cultural politics of European integration*. London/New York: Routledge.

SICI (2004) Newsletter, no.30. At www.sici-inspectorates.eu/file/87182/newsletterdec2004.pdf [2 June 2012]

Smith, A. (2009) 'Studying the government of the EU: The promise of political sociology', Europa Institute Seminar Series, University of Edinburgh.

Steiner-Khamsi, G. (ed.) (2004) *The Global Politics of Educational Borrowing and Lending*, New York: Teachers College Press.

Word count : 8002

3.6.2012