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PISA for scandalisation, PISA for projection: the use of international large-scale assessments in education policy making – an introduction

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ABSTRACT

The introductory article of the GSE special issue ‘PISA for scandalization, PISA for projection: the use of international large-scale assessments in education policy making’ contextualises the four articles of the special issue in the broader context of comparative policy studies in education. It reflects in particular on the question of why cross-national comparison is relevant for the study of ILSA (international large-scale assessment) policy reception and how ‘methodological nationalism’ may be avoided when using national education systems as units of analysis.

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An ever-increasing number of countries participate in Program for International Student Assessment (PISA), Trends in International Mathematics and Science Study (TIMSS), Progress in International Reading Literacy Study (PIRLS), and other international large-scale-assessments (ILSAs). Unsurprisingly, the exponential growth of ILSAs has triggered an avalanche of publications on the reasons for this growth and its impact on national school reforms.

The perspectives from which the phenomenon has been dissected are manifold. A great number of studies focus on the global-level. Some of them scrutinise the global ILSA network, a coalition of states, professional associations, international organisations, and the global education industry that advocates for, funds, designs, administers, or sells these international tests (Benavot and Meyer 2013; Martens, Knodel, and Windzio 2014; Hamilton, Maddox, and Addey 2016). The core beliefs that hold this coalition together and the question of what the Organisation for Economic Co-operation and Development (OECD), the World Bank, Pearson PLC, Cambridge Assessment International Education, and other global actors each gain individually from nurturing the growth of a global testing culture have become topics of academic scrutiny. Periodically, the global testing industry has come under siege for developing tests while simultaneously selling the books and the teacher training materials in preparation for the tests (Hogan, Sellar, and Lingard 2016). Unsurprisingly, the commercialisation of test-based accountability has become an object of intense academic curiosity and inquiry (Verges and Parcerisa 2017). Some have shown how the global education industry has succeeded in extending its reach by brokering education policies that require periodical testing of students, such as standards-based curriculum and accountability reforms; once the demand has been created, global actors sell their tests for an ever-increasing number of subjects, grade levels, and educational systems. Without a doubt, the rise of ILSAs has reconfigured power relations among global policy actors, giving great weight to global actors – both public and private – that control the means of test production. An analysis of global actors is relevant for understanding how global monitoring

and comparison of national development is used as a vehicle to spread certain global education policies at the expense of others.

1. ILSA research and the re-emergence of the nation-state in cross-national comparison

Equally important to analysing global actors, is the analysis of national and local actors. National governments, school districts, and local politicians are not passive victims of the global accountability lobby and the testing industry. The semantics of globalisation (Schriewer and Martinez 2004) have produced political pressure on national policy actors to invoke the larger international educational space, represented by PISA, TIMSS, and other ILSAs, when justifying national policy decisions. It is therefore necessary to draw attention to actors involved at the national- and subnational-levels in order to explain how the exponential growth of ILSAs has changed power relations among the many policy actors in a country.

To fill this gap in the literature on national and local actors, the authors of this half special issue ask questions such as when, how, and with what impact national policy actors have mobilised ILSAs as a national norm setting device. Of course, these types of research questions are not new. They constitute core research objectives of policy borrowing research, a subfield of comparative policy studies. In the early days of this particular subfield, the question was which educational systems have borrowed, transferred, or learned which reforms from which systems. For a long time, the focus of policy borrowing research was on the relationship between two countries; for example, the British interest in German education (Phillips 2015) or the United States interest in neoliberal United Kingdom policies of the 1980s, and vice-versa (Whitty 2012). However, in the new millennium, this traditional focus was dropped and replaced with studies of ‘traveling reforms’ or global education policies (e.g., Robertson et al. 2012; Steiner-Khamsi and Waldow 2012; Larsen and Beech 2014; Edwards 2018). The twenty-first century intellectual kinship among policy borrowing researchers and global education policy researchers is not coincidental; neoliberal, quasi-market reforms of the late 1980s have spread like wildfire to every corner of the world over the past three decades. The fundamental changes in how educational systems are regulated, notably, the shifts from input to output, from government to governance, from external inspection to self-evaluation by numbers, and finally from state actors to public-private as well as national-international networks, have been convincingly documented (Ball and Junemann 2012; Jules 2017). The globally structured neo-liberal agenda (Dale 2000; Robertson and Dale 2015) has indeed replaced punctual bilateral, cross-national policy attraction with ubiquitous policy transfer processes in which one global education policy diffuses across a large number of educational systems. As a corollary, when it comes to the global spread of, for example, the accountability regime, accreditation in higher education, or other global education policies, the directionality of transfer has become obsolete.

Strikingly, precisely at a stage in policy borrowing research when scholars have put the study of cross-national policy attraction to rest and instead directed their attention to the ubiquitous diffusion processes of global education policies, the cross-national dimension – and by implication the focus on the nation-state and its national policy actors – has regained importance in ILSA policy research. In the case of PISA, the preoccupation of national policy actors is, at least rhetorically, how their own system scores as compared to others, and what there is to ‘learn’ from the league-winners, league-slippers, and league-losers, in terms of PISA’s twenty-first century skills. Because policy actors often attribute ‘best practices’ to particular national educational systems, the national-level regained importance as a unit of analysis. ILSA policy researchers therefore found themselves in a position of having to bring back the focus to national systems; a focus which if used naively, should be cause for concern. The risks of methodological nationalism are reiterated here to demonstrate how the authors of this half special issue distance themselves from the homogenising effects that cross-national comparison tends to have.

In acknowledgement of the widespread critique of methodological nationalism, forcefully put forward by scholars in sociology, social anthropology, and the comparative social sciences (Giddens 1995; Wimmer and Glick Schiller 2003; Dale 2005; Robertson and Dale 2008), the editors of this issue feel that the choice of national education systems as the unit of analysis requires justification. In a seminar article on methodological nationalism, Andreas Wimmer and Nina Glick Schiller assert that '[m]ethodological nationalism is the naturalization of the nation-state by the social sciences' (Wimmer and Glick Schiller 2003, 576). They identify three variants of methodological nationalism within the social sciences: (i) disregard of the power of nationalism for modern societies, (ii) naturalisation, that is, taking for granted the boundaries of the nation-state and using them to define the unit of analysis, and (iii) territorial limitation of social research in that phenomena are only examined within the political and geographic boundaries of particular nation-states rather than transnationally. In comparative education, the critique of methodological nationalism has greatly resonated with scholars who draw on political economy thought, world systems theories, or critical globalisation studies to demonstrate the unequal transnational flows of educational goods, services and 'best practices'.

For these reasons, current intellectual projects that 'bring back' the nation as the unit of analysis must explain the difference--and in our opinion should explicitly distance themselves--from earlier projects, which framed national educational systems as bounded and homogenous entities that could be easily compared, or contrasted, to other systems. These earlier studies oftentimes ended up being tautological or engaged in a 'self-reinforcing way of looking at and describing the social world' (Wimmer and Glick Schiller 2003, 578). They predicted the existence of vast differences among national systems and unsurprisingly, as an artifact of their method of inquiry, found these differences and described them in an essentialising manner (see Steiner-Khamsi 2002).

Our own interest in comparing PISA reception across systems as well as across different reform periods within a system, stems from a diametrically opposed research interest. Our preoccupation with the national-level attempts to bring to light the performative act of systems. At particular moments, systems generate national boundaries and reassert themselves as national entities in order to make it appear that there is (global) external pressure for reform or change. In the same vein, they construct other national systems as reference societies at particular moments to suggest that lessons should be drawn from these systems. The political act of 'externalisation' serves to unify or – to use the proper term – to build coalitions in support of an educational policy. It is important to point out here that every political act of externalisation necessitates, but also contributes to, the social construction of the nation as an acting subject. Our attention is directed to how governments deal with policy contestation, at what moments they resort to the semantics of the 'national' and the 'global', and what impact their acts of externalisation have on authorising controversial educational policies in their country.

Having said this, it is also important to keep in mind that in some countries the government has ceased to be the main national policy actor. In an era of 'network governance' (Ball and Junemann 2012), businesses, churches, and parent groups as well as international organisations exert enormous pressure on governments to further deregulate the system and delegate the provision of education and the creation of new policies to the private sector. In some educational systems, such as in England, the provision of education has been diversified and the role of the government minimised to the extent that Stephen Ball suggests that we use the term 'system' with precaution (Ball 2018). As is explained in the following section, PISA lends itself to such boundary work because public policy, including educational policies, are by definition controversial, that is, supported by some, and contested by others.

2. Interpreting scandalisation and projection as idiosyncratic responses to ILSAs

This half special issue deals with cross-national policy attraction, but it studies the phenomenon in two new ways: It is analytical rather than normative and it critically reflects on how policy actors use

the method of comparison for national policy setting. First, rather than normatively postulating that the ‘best-performing’ educational systems of Finland, China, Singapore, or other league-winners *should* be used for lesson-drawing (Liang, Kidwai, and Zhang 2016), the analytical focus of this group of authors is on how national policy actors have *actually* used ILSAs for national agenda setting or policy formulation. Second, the cross-national dimension of ILSA policy research begs for an additional objective of inquiry: Which countries do policy actors select as a ‘reference society’ (Bendix 1978, 292) and which countries do they consider as ‘negative reference societies’ (Waldow 2017, 647) or ‘counter-reference societies’ (Takayama in this issue), respectively? The concept of reference or counter-reference society is based on commensurability. How do national policy actors *make* the educational systems of league winners *appear* to be comparable to their own educational system, in order to suggest that lessons could be drawn? The inverse also applies when negative references to league-losers are made, begging the question: How do policy actors use comparison as a tool to differentiate themselves from ‘low-performing systems’? The question of how commensurability is constructed and to whose benefit or at whose expense, has been an important field of study in historical sociology (McAdam, Tarrow, and Tilly 2001) as well as, more recently, in the sociology of measurement (Gorur 2014). Thus, the analysis of how commensurability is established is another research topic that ILSA policy research has brought to focus.

In this collection of articles, two particular national policy strategies, both closely associated with the reception and translation of ILSA results, are examined in greater detail: (i) the *scandalisation* of public education and (ii) *projections* into ILSA league-leaders, league-slippers, and league-losers. According to Gita Steiner-Khamsi (2003), ‘scandalization’ means ‘highlighting the weaknesses of one’s own educational system as a result of comparison.’ This does not necessarily mean that low scores are the reason for the scandalisation. Comparison is a complex process of meaning-making, and different ways of framing success and failure play an important role in that process. Thus, scandalisation can even occur when ILSA results are very good, e.g., if there is a perception that good results have been bought at too high a price, as claimed by some observers, e.g., in Korea (see Lee and Sung forthcoming).

Research on policy borrowing and lending has shown again and again that references to ‘elsewhere’ depend mostly on the perspective prevalent in the context from where the referencing is being done, not on the context serving as the reference (see Zymek 1975; Steiner-Khamsi 2004). The concept of projection (Waldow 2017) takes this insight one step further, stressing that actual conditions in the place that is being referred to are often of minor importance. Rather, what is important is what observers *want* to see, to the extent that what is observed may not actually exist in the place serving as the reference. Projections serve to legitimate or de-legitimate educational policies and agendas in the place from where the projection is made. Conceptions of ‘good’ and ‘bad’ education are projected onto countries or regions like a slide or film is projected onto a projection screen. Reference societies will thus usually be depicted in a very selective way, with certain aspects being emphasised out of proportion and complex or contradictory aspects being presented in a simplified way.

The four articles comprising this half special issue have employed the concepts of scandalisation and projection in fruitful and original ways, generating important insights into the ways in which ILSAs and their results are used as a national policy device in various locations. The authors are part of a larger community of globalisation scholars who acknowledge the intellectual value of analysing local meaning-making of global policies and devices. They use the national actors as their unit of analysis to understand why, when, and with what impact these actors engage with the ILSA global policy device, and how they establish commensurability or non-commensurability with other educational systems that participate in global testing. The methodological tool of the authors of this half special issue is comparison in its most comprehensive sense; that is, comparison across different national educational systems, comparison across different time periods within the same educational system, as well as comparison of national educational systems against constructed international standards or benchmarks. This comparative method of inquiry enables the authors to show the varied

national policy uses of ILSAs. It is through comparisons of different national contexts as well as temporal comparisons within a singular national context that the conceptual link between the varied local encounters with global education policies and devices may be made.

3. The wide range of comparative methodology

The four articles in this collection use a comparative methodology to demonstrate how the same ILSA result can be interpreted differently, reflecting varied political agendas and stakeholder interests. *Joakim Landahl* focuses on the early stage of ILSAs in the early 1970s and examines the policy impact of the Six Subject Survey on curriculum reform in Sweden. The International Association for Educational Assessment (IEA) released the results of the Six Subject Survey in 1973. A total of 21 countries, including Sweden, participated in the ILSA. The release occurred a decade after a major school reform in Sweden was launched: The comprehensive school reform. The reform replaced older forms of secondary education such as grammar schools, girls' schools, and vocational schools with a system that was less selective and therefore deemed more democratic. The reform was controversial and was heavily criticised by conservative parties in Sweden, who claimed that academic standards had declined and that students were learning less as a result of the reform. However, in 1973, the Six Subject Survey results were released for three of the six subjects (literature education, reading comprehension, and science) suggesting that the 10-year students in Swedish schools were high performing. The results stunned both proponents and opponents of the comprehensive school reform.

Landahl writes that in the early days of ILSAs, IEA condemned the competitive nature of cross-national comparison and refused to provide league tables. Instead, the results of the Six Subject Survey were used as a tool to evaluate the common school reform in Sweden. Despite the warnings of academics against using the results in a competitive manner, the Swedish media referred to the test as the 'knowledge Olympics' and spread the news that students in Sweden were 'the best in the world' in reading and comprehension (Landahl, in this issue). Landahl compares the media's depiction of the Swedish fundamental common school reform before and after the release of the spectacular Six Subject Survey results, enabling him to examine the impact of an international standardised test on national reform debates. He asserts that the national reading or translation of the ILSA results led to a de-scandalisation of the common school reform. The proponents of the *grundskolan* (common school), including the minister who initiated the reform, used the ILSA results as political leverage to reassert the reform path taken with the common school reform. Landahl notices a discursive shift in how the quality of Swedish education was assessed. Prior to the Six Subject Survey, the unit of comparison was the national past, whereas beginning in the 1970s, developments abroad became the object of study for national policy actors in Sweden.

Dennis Niemann, Sigrid Hartong, and Kerstin Martens draw attention to the subnational-level, which is often neglected in ILSA research. They compare two federal political systems; the one in the United States with its large decision-making authority at school-level, with the one in Germany, where power is geographically decentralised to the *Länder* (sub-national state)-level. Through this comparison the authors examine how PISA results are received and translated in contexts where the national-level is of limited relevance for decision-making. Embedded in the interpretive framework of historical institutionalism, the authors use the concept of path dependency to explain why the policy responses to PISA differ so widely in the United States and Germany. German stakeholders at *Länder*-level actively used the PISA results to generate reform pressure and advance their own reform agenda. In contrast, interest in the PISA results was strikingly absent in the United States, where PISA became moderately interesting only when China entered the race (2009) and when PISA For Schools entered the ILSA market (2015).

Self-proclaimed as the 'gold standard' for evaluating school reform, how are the PISA results in fact used in highly decentralised federal systems such as the United States and Germany? Niemann et al. identify the key features of the PISA technology that actually encourage stakeholders 'to make

projection to other education systems, derive concise reform strategies, and justify policy changes.’ The largest global database on educational performance, the PISA dataset is rich both in terms of variables (indicators) and cases (educational systems). As Niemann et al. assert, the dataset is made easily accessible for non-experts through visualisations, rankings, summaries, and interpretations of main findings. What is more, the league tables create a test-specific international community, composed of countries that agree to having their students take the particular test. However, PISA has had a limited impact on school reform in the two federally governed countries of the United States and Germany. It was instead most influential as a monitoring device. It popularised the tool of standardised testing and monitoring learning outcomes. Thus, what mattered in the United States and Germany were neither the results nor the ‘best practices’ from cross-national comparison undertaken by PISA, but the device itself. The global test helped to accelerate and institutionalise test-based accountability or, as Radhika Gorur would say, made policy actors – at *Länder*-level but also at school-level – ‘see like PISA’ (Gorur 2016).

Keita Takayama compares the reception of the two ILSA league leaders, Finland and Singapore, in Australia. He finds that the media in Australia attributes the high performance of students in Singapore to the overly protective, ambitious, and stressful childrearing practices in Asian societies. Singapore is not the only Asian country that is depicted negatively despite its high scores in terms of students’ learning outcomes. Two out-of-school factors, notably ‘tiger parenting’ and private coaching, are the most commonly used explanations for students’ high performance in Singapore, Korea, Japan, People’s Republic of China, and Taiwan. Cummings (1989) observed a similar negative reaction to education in Japan. When the report *Nation at Risk* suggested that policy analysts should learn from Japan, Cummings notes that American researchers tended to use a ‘yes, but ...’ approach. This approach acknowledges the successes in the other educational system, but at the same time ‘argues that these successes come at too high a price, a price Americans are unwilling to pay’ (Cummings 1989, 296). At the time, the exaggerated statements or myths about Japanese education included an inverted socialisation paradigm (indulgence in early childhood, discipline in adolescence, and early adulthood), education for the nation and the state, *kyoiku* mama (education-oriented mother), rote learning in schools, competition and suicide, elitist higher education, and social inequality. These generalised judgments of Japanese society and education helped to fence off public pressure to learn from Japan.

The American stereotypes used to describe education in Japan in the 1980s are remarkably similar to the stereotypical, negative explanations Australians use in the new millennium to explain why Asian countries score so high on ILSAs. *Takayama* asserts that the negative stereotypes serve as a device for Australians to distance themselves from education systems they consider to be ‘bad.’ They project the opposite of what they consider to be good education onto Asian education systems. By doing so, they generalise and essentialise. The Australian media lumps together the league-leaders in the region and uses identical, negative explanations for ‘PISA success’ in Asian countries. Finally, the assumption is made that Asian education practices are biologically determined and hereditary, that is, passed on from one generation to the next. As *Takayama* contends, the projections onto Asian education systems are racist and the Pan-Asian stereotype only serves to create the generalised Pan-Asian Other.

Oren Pizmony-Levy examines how national debates on PIRLS, PISA, and TIMSS have created a sentiment of ‘achievement crisis’ in Israel. He compares actual ILSA results with how they are presented in the media and how they are used politically by national stakeholders. The scandalisation of the Israeli school system is reflected both in headlines such as ‘Disappointing performance’, ‘Israel repeats a grade’, or ‘The grade: failing’, as well as in how the results are visually manipulated in national newspapers. In one newspaper illustration, the ranking table of the countries that participated in TIMSS 1995 is cut off after the names of the first twenty participating countries (from a total of 45 countries). The partial list of countries was meant to make readers believe that only 20 countries participated in TIMSS and that Israel’s rank of 17 was near the bottom.

This dramatisation in the media has remained constant over the period 1996 to 2016, even though the Israeli school system is positioned near the middle on the PISA, TIMSS, and PIRLS ranking tables. The 2015 TIMSS results in mathematics and science are similar to the ones in the mid-1990s, with a slump in test results between 1990 and 2003, followed by a recovery between 2007 and 2015. Similar to the TIMSS findings, the PISA results suggest that Israel's performance in mathematics and science fluctuates somewhere around the international average. In reading literacy, the country improved its position on the ranking tables of both PIRLS and PISA. Clearly, the national average scores alone do not warrant the crisis scenario depicted in the media. What does deserve attention, however, are the significant differences in ILSA results between Jewish and Arab students and between students from high and low socio-economic backgrounds. The vastly different results provide a wide spectrum of possible interpretations. As Pizmony-Levy points out (in this issue),

These patterns provide local actors with ample opportunities to interpret ILSA results in different ways. Some actors could draw on the average achievement scores to characterise the Israeli educational system as mediocre, but stable in terms of performance. Others could use the ranking tables to characterise the Israeli educational system as going downward with regard to performance. Yet, other actors could simply ignore ILSA results and delegitimise them as relevant, appropriate, and useful evidence.

In addition to the media analysis, Pizmony-Levy compellingly demonstrates how different stakeholders in Israel have interpreted the ILSA results in ways that advance their own agendas. Members of the Knesset used the release of the ILSA results to mobilise financial resources for the education sector by presenting the mediocre performance as a security risk and a national defense issue for the country. The Ministry of Education used the political momentum to break teachers' strikes, revise the national curriculum, establish system-wide standards, introduce new textbooks, and institute the National Task Force for the Advancement of Education in Israel. The Teachers Union, in turn, used the political attention being given to the education sector to demand salary increases. Both Pizmony-Levy (in this issue) and Resnik (2011) observe that several groups in Israel used the ILSA results to first construct a new social problem, labelled as 'interstate achievement gap', only to then promote managerialism as a global solution for the national problem.

4. Invoking ILSAs as a quasi-external source of authorisation

As the four articles in this collection demonstrate, a comparative perspective is needed to examine why ILSAs are attractive to local policy actors and how local policy actors translate ILSA results into their own context. Such a dual focus on reception and translation is core to comparative policy studies in education.

In recent years, an interesting new body of research has emerged that analyses why the same global policy resonates and is adopted differently in different local contexts. The assertion that global education policies resonate for different reasons in different contexts has also been made in recent studies on why governments participate in ILSAs, such as PISA or TIMSS. The most widely advanced rationales concern the claim that valuable lessons can be derived from comparing educational systems both at a certain point in time and over time. Addey et al. (2017), however, move beyond these rationales and present instead a sophisticated analytical framework that allows them to identify the wide array of reasons why national governments participate in ILSAs. The seven most common reasons for governments' engagement with ILSAs are: (1) evidence for policy; (2) technical capacity building; (3) funding and aid; (4) international relations; (5) national politics; (6) economic rationales; and (7) curriculum and pedagogy. With a similar focus on national policy context and an interpretive lens of historical institutionalism, Antoni Verger and his associates trace the pathways to privatisation in different countries (Verger, Fontdevila, and Zancajo 2016). They identify six different pathways: (i) privatisation as a reform in which the state was systematically restructured along market lines and services previously provided by the public sector were outsourced to the private sector (e.g., Chile; the United Kingdom), (ii) as an incremental reform in which the decentralised system scaled-up privatisation by means of vouchers, charter schools and

choice policies (e.g., the United States), (iii) as a continuation of an already existing, long held public–private partnership between, for example, faith-based institutions and the state (e.g., Netherlands, Spain), (iv) as a stated public administration reform to make the public sector act more like businesses by selectively adopting principles of the private sector, also known as ‘endo-privatization’ (e.g., prevalent in many social-democratic governments of Scandinavia and continental Europe), (v) as de facto privatisation in low-income countries, and finally (vi) as privatisation by catastrophe (e.g., New Orleans after Hurricane Katrina, aftermaths of wars in El Salvador and Iraq). The global neoliberal wave of privatisation has encountered varied degrees and variants of privatisation in various national contexts. The receptiveness or resistance towards the new neoliberal wave of privatisation can only be captured adequately against the backdrop of past adaptations of privatisation in a national context.

Similarly, there also exist a plethora of studies on how PISA results are discussed or ‘translated’ at country-level, mostly in the media. However, rarely do these studies adopt a critical comparative perspective that allows them to see how PISA translation relates to ongoing policy debates and power relations among the various policy networks in a country. In particular, these studies fail to examine which kind of discursive power is associated with ILSAs that eclipses, or exacerbates, conflict over agenda setting at the national-level. ILSA top-scorers such as Finland and Shanghai have become global ‘reference societies’ for policy-making; the processes at work here are far more complicated than the commonsensical explanation of straightforward lesson-drawing from league-leaders would suggest. ILSAs are more often than not used to either generate or deflect reform pressure on national educational systems. Strikingly, reform pressure related to ILSAs is being actively generated by national policy actors themselves. National actors use international tests as a quasi-external stamp of approval to carry through unpopular reforms, to stave off unwelcome reform pressure or, in the aftermath of recent reforms, to justify the path that was taken to improve the educational system.

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