2 Layers of reflectivity in comparative research

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Introduction: reflective research

One of our research project's assumptions is that the topic of quality assurance and evaluation (QAE) is political: it is an important framing factor for education, a major interest for many different stakeholders, and a governance tool (Nóvoa & Yariv-Mashal 2003). In this respect, it is possible that our research will be used for political purposes, an aspect most of our research participants and fellow researchers certainly recognise. Self-reflection is therefore essential.

In Chapter 1, we discussed our ontological and epistemological premises and how the analytical framework on which we draw, Comparative Analytics of Dynamics in Education Politics (CADEP), directs our focus to three dimensions we see as relevant for an understanding of the questions raised in complexity studies and the approaches of political science to contingency. While the previous chapter addressed the "why" question of our research, here we open more broadly the questions "how" and "what". There is no simple answer to these questions, because the shared view of scholars is that research is never as straightforward as research reports describe – and in this respect, this book is no exception. Our research journey has taken a route with paths, streets, cul-de-sacs, and wanderings through uncharted territories. As a research consortium, we have held CADEP as a compass, while continuously debating its interpretation. A description of this journey is needed for validity: indeed, sharing our journey is as important as arriving at our destination. In this chapter, we therefore chart it as fully and as critically as possible.

We believe the key to maintaining validity in a qualitative research project such as ours is to adopt a reflective approach throughout. We share the view iterated by many scholars, but which Alvesson and Sköldberg (2009) aptly describe and summarise, that interpretation, and the interpretation of interpretation, is the key feature of research. They state that reflective research considers four elements, which we highlight here and discuss further in the following sub-chapters.

- **Researchers should be conscious of the interpretation made**. We have channelled the interpretations from the outset with the help of the CADEP analytical framework. Despite this shared analytical starting point,

the following chapters use additional theoretical notions to facilitate interpretation. The framework is discussed in detail in the next section.

- **Researchers should be prudent with the systematics of the research procedure.** Arguably, the systematics of the research procedure is the aspect of a research report which usually receives the most attention. We have devoted considerable time to developing systematic approaches and common goals in gathering data and indexing the research material. This work is described in detail in the section discussing the technical aspects of our research design, as well as in the appendices.
- **Researchers should be aware of the political and ideological role of social science research**.
- **Researchers should be reflective concerning representation and authority in their work**. These two elements of reflective research, the political and the ideological, and the way the text seeks to claim authority (Alvesson & Sköldberg 2009: p. 273) are intertwined in this book. This intertwining resembles the reflection offered by post-colonial theories and relates to us as researchers as cultural in- and outsiders and to the questions of how we can build an understanding of Brazil, China, and Russia with "Western" concepts from the Global North (see Centeno, Kauko & Candido 2017). We construct this reflection by analysing a set of research narratives from the members of our group in the penultimate section. The political implications are already clear in our research aims as we analyse the use of political space; this is a question that we address in the final chapter.

Our research design is best described as abductive, where theoretical and empirical work are complementary, concentrating on "pattern finding [which] is at the heart of science" (Alvesson & Sköldberg 2009: p. 7). In gathering our research material, the CADEP framework focused our attention on actor relations and room for action, but our analysis was conducted more inductively, resulting in an investigation of the problematics which cut across the three cases and their inherent contextual logic. This links well to the reflective process of research, and the starting points of abduction reflect the fact that the same data open a maze of forking interpretative paths (Hanson 1972; see Alvesson & Sköldberg 2009: pp. 7–8). To put this differently: our research design increases the need for the scrutiny of validity. The four elements of reflection Alvesson and Sköldberg describe, listed here, provide us with tools to understand how deductive elements with their cultural presuppositions and theoretical underpinnings or inductive analytical interpretation with its technical solutions have all affected our work. These aspects are elaborated in the following.

Interpretation: comparing three dimensions of dynamics

We continue this reflection on the nature of our research by addressing the question of our analytical framework in relation to those of others. Our research concentrates on understanding the political dynamics in QAE. To

posit the relevance of focusing on dynamics instead of processes of dissemination, adaptation, and implementation, in this section, we relate our view more closely to comparative education theory and methodology. We call our method "comparing dynamics" to indicate our understanding of our research's analytical unit, the dynamics of education politics, implying our interest in the movement involved in education politics.

The adoption of the dynamics of the QAE agenda as our unit of analysis indicates our concern to study global and local practices and policies in relation to each other and our presupposition that they are mutually contingent (Schwinn 2012) and often interrelated (Schriewer 2009). While our study is undertaken within the borders of Brazil, China, and Russia, our approach is situated within the growing research corpus which problematises the traditional understandings of country-bound territorialism and the dichotomy of an abstract global and concrete local and which is moving towards an understanding of the production and use of space (Anderson-Levitt 2012; Dale & Robertson 2002; Robertson, Bonal, & Dale 2002; Werner & Zimmermann 2006; Carney 2009; Vavrus & Bartlett 2006).

By focusing on dynamics, we aim to transcend both conceptual global-local dichotomy and methodological nationalism while observing the golden rule of explanatory comparative studies, which is that context matters. Our comparing dynamics perspective engages with what Steiner-Khamsi (2014) calls a "contextual comparison", which we see as an invitation to understand the multi-layered comparative context. Multi-layeredness relates to how our analysis considers actors from, and the developments occurring in, different contexts of action, ranging from schools to international organisations.

Studies engaged in cross-national comparisons have either shown that political or geographical boundaries are poor variables for explaining educational phenomena or asserted that local particularities are behind variations. The challenge today appears to be to operationalise a research design that captures the complexity of cultural socio-political contexts which are sufficiently inclusive to structure, and be structured by, other contexts but remain sufficiently exclusive to (re-)engender contextual differences. As Chapter 1 indicates, we use the word *transnational* to capture the multi-layered nature of context, the practices and policies which develop amidst this setting, and the dynamics and spaces of action they produce.

We develop a contextual comparison which considers vertical and horizontal analyses. We combine a horizontal comparison of the problematics which cut across the three cases with a vertical analysis of the different contexts within each case. It is important to note that our understanding of "contextual comparison" (Steiner-Khamsi 2014) includes agency. This means conceptualising agency and relationality as simultaneously embedded in contextual cultural and socio-political situations and in self-directed actions which, although subject to changing power structures, enable actors' construction of possibilities and room for action as indicated in Chapter 1. In understanding dynamics, we aim to arrive at a description of the relations of actors in these cases which will allow

us to understand the patterns, limits, and possibilities of action across Brazil, China, and Russia.

In Chapter 1, we described three analytical dimensions for comparing dynamics: the political situation, political possibilities, and the use of political space. In Table 2.1, we summarise how the CADEP framework steers our work and how it links to the questions of QAE dimension by dimension. Here, we must note that the different dimensions of analysis overlap in the different chapters, meaning that all chapters chart all dimensions to some extent.

The political situation: a constellation of actors in a socio-historical context

As Table 2.1 indicates, in analysing the political situation, we focus on how socio-historical dependencies create the basis for actor relations and how these relations are reshaped by QAE policies. The results of the *Fabricating Quality in Education* study raised questions about changes in actors in a political situation, which revealed the interconnectedness of the buttressing and creation of new organisations working on statistics in Europe (Lawn & Segerholm 2011). The national reactions to external signals may vary (Grek & Rinne 2011) and depend on path dependencies (Kauko & Varjo 2008). However, it is clear the ascendancy of new actors is essential in reforming actor relations (e.g., Barber 2014).

The question of the political situation culminates with the idea of an opportune moment (*kairos*) when policies can be changed (Palonen 2006). The dimension of the political situation leads us to analyse what the political structure, with its constellation of actors, allows in its socio-historical and transnational context (see Simola et al. 2017). While the constellation of actors and its

Table 2.1 CADEP framework for analysing QAE in this book

Dimension	Questions	Relation to QAE
(1) The political situation	What is opportune in a specific socio-historical and transnational situation?	Analysing the actor constellations and their formation in the socio-historical situation and the quality-related transnational education networks.
(2) The political possibilities	What are the political possibilities opened by prevailing discourses?	Analysing the central debates and problematisations: how are quality discourses formed, and how are they related to what is considered possible in education?
(3) The use of political space	How do the relevant actors exploit the existing situations and possibilities?	Analysing action in the space where QAE policies are used to reshape the practices, discourses, and positions of different actors.

relationship to the socio-historical situation has been studied with the help of policy process theories, the transnational dimension is an addition the developments in comparative theories can offer.

Indeed, the political situation dimension has been studied in political science literature in the context of national policy processes. Kingdon (2003) emphasises the role of policy entrepreneurs in waiting for the right moment to introduce a solution to emerging problems. Baumgartner and Jones (2009) find that policy changes in bursts after an agenda has been populated with similar ideas. Sabatier (1993) emphasises the role of external factors in sub-system changes. All use a different interpretative framework for changes in the political situation but agree that socio-historical factors are important to understand the external limitations for politics as it evolves. They also regard the political constellations of actors as key to an understanding of the internal logics of a political system. We therefore see the relationship of these internal and external factors as one of the main elements in understanding a political situation (Kauko 2013; Simola et al. 2017).

Theories concerning the policy process have focused on national decision-making, but they cannot escape comparative research's criticism of methodological nationalism. Whether defined by territoriality or political scope, seeing scales or levels of action like the national as analytical units is questionable and needs reconsideration (see e.g., Collinge 2005 and Issue 3 of *Comparative Education 49*, 2013). We do not deny their assistance as widely used heuristic devices in elaborating and understanding arguments, and we therefore do not entirely avoid them. However, we subscribe to the idea of the mutual embeddedness of the local and the global, or the sub-national, national, and international, creating transnational room for action.

A political situation is interwoven at both levels and scales, as well as history (see Nóvoa and Yariv-Mashal 2003). Studies in global history (e.g., Ressler 2010) and the sociology of globalisation (e.g., Sassen 2007) show the entanglement of levels and scales in the (re)construction of historical and social processes. They are not only connected through the mutual influence of persons or ideas; they also permeate each other: practices and policies pertaining to the global occur at the local level (Sassen 2006), and micro-activities cutting across localities have a global reach (Santos 2006). Space and scope, reach and impact are no longer defined by the scale of each occurring action. This perspective is useful in studying the effects of the global agenda on QAE (Chapter 1).

The political possibilities: understanding politicisation

The second dimension of our analysis, political possibilities, links to how the discourses shape what the actors see as possible. It is generally concerned with identifying the possibilities in the existing discursive formations and what is politicised. This dimension might be described as an analysis of the discursive conditions and resources (Simola et al. 2017). When actors attempt to create more room for their action, they may try to politicise various issues

(Palonen 1993, 2003). For example, this entails the aim of placing new issues on the political agenda, disputing or compromising on an existing issue, or, in the broadest sense, the expansion of the political arena by the introduction of new players or of old players as newly relevant for the arena. If an issue is not politicised, the action which is seen as possible is limited to the old arena and its patterns.

Another, and from the comparative perspective rather fruitful, view of the question of political possibilities is represented by the question of problematisation. In researching Portuguese-speaking countries, Nóvoa et al. (2003) introduced the idea of "interpretative community". An imagined community was created through a shared understanding of the world. Later, Nóvoa and Yariv-Mashal claimed that the understanding of problematisations and their historical formation was more important than essentialist comparisons of "facts" or "realities" (Nóvoa and Yariv-Mashal 2003). We find this idea useful for our analytical framework. Problematisation is a discursive structure which delimits what is considered relevant, and defines what is "real" and what is expected of different actors (see Bacchi 2012). In other words, this analytical lens focuses on presuppositions about causes linked to proposed solutions and on the wider political concerns embedded in and reflecting broad policy debates and political constraints (Bacchi 2012; see Kingdon 2003).

As we argued in Chapter 1, quality has emerged as a central element of the shared language about education. This has happened both to problematise education and to resolve diverse problems (e.g., Ozga et al. 2011; Kauko et al. 2016). This shared language about education contains a set of uniform solutions to diverse problems and contexts, and these uniform solutions rely on and necessitate a shared approach to problematising education. This shared problematisation plays a significant role in making proposed solutions seem natural and inevitable. However, in questions of QAE, the possibilities for politicisation are also always present.

The use of political space

The third dimension of our analysis, the use of political space, is the most difficult to analyse. This dimension seeks to describe the extent to which actors can capitalise on an existing political situation and political possibilities. In other words, the political space (with its apt German description *Spielraum*, "play/game room/space") is shaped by the two other dimensions, and the third dimension seeks to understand how it is used. The use of political space may also be described by other metaphors, such as "the art of playing with contingency" (Simola et al. 2017: p. 18).

Political science literature offers differing views on the use of political space. Prominent here is Kingdon's idea of multiple streams. Drawing on the garbage can model (Cohen, March, & Olsen 1972), he describes how political actors aim to combine policies and problems at the right moment and introduces the idea that actors (for Kingdon, policy entrepreneurs) prefer certain

solutions and try to find the right problems to couple these with, rather than *vice versa* (Kingdon 2003). The model has been criticised for its heuristic view and for its lack of understanding of historical trajectories (Zahariadis 1999; Baugartner, Green-Pedersen, & Jones 2006: p. 963). However, it helps us to understand the resourcefulness and complexity of political action – how the first two dimensions of political dynamics (the political situation and the political possibilities) create the frame for political action as they determine actors' room for action.

Here a relevant contribution arises from the understanding of the social construction of space, which has been an element of comparative education since at least the 2000s. Larsen and Beech (2014) describe a "spatial turn" which focuses our attention on the relational notion and productive functions of space. This view holds that a "relational notion of space implies understanding that space not only exists in substantial, concrete, and separate forms, but as sets of relations between individuals and groups" (Larsen and Beech 2014: p. 199), and that the "global is not just some space, out there, without material basis. It is produced in local settings" (Larsen and Beech 2014: p. 200). We agree with this, and we believe the use of political space seeks to understand this productive function through an understanding of action or of how the space for action is produced through the interpretations and alterations made in the political situation and political possibilities. Another important contribution to the development of our understanding of the uses of space in comparative settings is what Carney (2009) describes as the "policyscape", by which he means the similar vistas for action created by neoliberal policies in very different contexts.

The focus on political action which we aim to understand in the third dimension of the use of political space has been especially pointed to in comparative education research as a criticism of faceless explanations of processes such as globalisation. Dale and Robertson (2002: p. 12) remind us that the globalisation process always has an actor: "local structures and institutions, processes and practices, are crucial to, even the medium necessary for, the spread of global practices". The same is true of culture according to Anderson-Levitt, because it "is locally produced by particular people who interact in particular places" (Anderson-Levitt 2012: p. 446). Ozga and Jones (2006) point out that travelling policies adapt to embedded ones. Space thus exists as "sets of relations between individuals and groups" (Larsen & Beech 2014: p. 200). In our analysis, the key question regarding the third dimension of dynamics concerns how the room for action is created as a process which is tied to the relations between actors as well as institutional structures.

In our understanding, research into QAE in education has failed to take room for action as an empirical starting point. An exception is found in Dahler-Larsen's theoretical ideas. He sees constitutive effects as the best description of the repercussions QAE policies have: they affect actor relations. For example, this is not captured by the term "unintended effects", which connotes the possibility of controlling the QAE process and dividing it into intended and unintended consequences (Dahler-Larsen 2011, 2012). What we seek to understand

is how in each of our three cases QAE policies are formed through a unique combination of transnational discourses, techniques, practices, and specific political ambitions to distinguish the particular constitutive effects of QAE implementation and, in this sense, how they present comparable and related patterns of dynamics which shed light on the room for political action between different scales.

Systematics of the research procedure

To analyse the three dimensions just described, we collected a range of research material from different actors in the case countries. The project's research material consisted of documentary material, interviews, and observations. The documentary material used in each chapter is mentioned in the reference list. The interviews are anonymised, and they are referred to with a combination of country codes (BR, CN, RU), actor level and role, and interviewee number (see Appendix 1). Observations are referred to generally and based on observation diaries. Data collection is tightly linked to the local conditions in each context, which we describe briefly.

We selected sub-national and local cases in Brazil and Russia on the basis of their activity in the introduction of QAE policies and participation in international QAE initiatives. In Brazil, we conducted research in Santa Catarina state and its capital, Florianópolis, and in Russia, we studied QAE in the Republic of Chuvashia and its capital, Cheboksary. In China, our access to sub-national and local institutions was restricted, so data collection on these levels followed a different pattern, and the names of the case localities and organisations cannot be disclosed. Details about local cases in the three countries are provided in Chapter 7.

Table 2.2 displays the core structure, themes, and goals of the interview guideline, which was used throughout the project on all levels and in all countries. As well as directing the interviews, it served as a means of focusing other research material collection and therefore also demonstrates the means by which the CADEP frame was operationalised. The political situation was investigated by identifying actors' roles to understand the formation of polity. The aim was to reach an understanding of how the different actor constellations varied depending on the subject and related to the question of the political situation. The political possibilities were largely investigated based on the various themes arising from the interviews' introductory section. This helped us to understand the key questions' problematisations. A range of questions from different parts of the interview guideline, especially those related to change dynamics and the future, was useful in analysing the political room for action.

The complete interview guideline (see Appendix 2) contained many specific and common questions to enable its adaptation to the different situations in each country. The content was also tailored to the respondent's level of action, context, and areas of expertise: we adjusted the interview script to the respondent's profile and history. For example, where the Brazilian national

Table 2.2 Main themes and goals in the collection and analysis of data

Theme	Common goals
Introduction	To understand the respondent's view on quality and evaluation in school education
	To understand the interviewee's concrete involvement in – and its perceived impact on – QAE policy and practice
Actors	To understand who the main actors (collective or individual) in the field are and their role/action and perceived impact on quality and evaluation policies and practices
	To understand the position in the field of the interviewed actor and the connections/relations between different actors
Change dynamics	To understand changes in actor relations
	To understand the role quality and evaluation practices and policies have played in changes in actor relations and to identify whether and how they define actor relations (or *vice versa*)
	To understand transnational connections and their impact on national and sub-national policies and practices
Future	To understand actors' perceptions of expectations and possibilities

agency responsible for making large-scale assessments, the National Institute for Educational Studies and Research (INEP), was concerned, we adhered to the main frame when interviewing the president and departmental directors, but interviews with technicians were tailored according to their field of work. Likewise, in interviewing those working with the OECD and Programme for International Student Assessment (PISA), we focused on issues such as the relations between Brazil and the OECD or the production of PISA data. Similarly, in Russia, there was a telecommunications agency working in camera surveillance and a media outlet creating school rankings, and in these cases, the interview framework was adjusted according to the area of respondents' work. In the Chinese case, there was a similar logic. For example, the questions to policymakers focused more on the policymaking process, but when we interviewed the technicians from the national assessment centre, questions were more focused on their practical work in developing measurements.

Methodological literature on interviewing those with power emphasises good preparation and strategies to gain access. However, as Walford (2012) states, the real difference here may lie in access. For example, interviews should be well prepared by researching both the context and what the interviewee has already publicly established. Although this is often seen as a feature of interviewing the powerful, they are as important for interviewing others, such as experts and leading managers. Contextual knowledge is also crucial for school interviews, for example. This was embedded in our research design: interviews were prepared with the help of review literature and document analysis. Furthermore, as a foreign project in three countries, our access question was not limited to interviewing those with power, as the next sub-chapter elaborates.

Data collection in three contexts

The Brazilian education arena is wide in both horizontal and vertical relationships. It encompasses the public and private sectors, along with third sector organisations, actors from different levels, and representatives of a variety of institutions, such as government, unions, universities, professional and institutional associations, foundations, civic movements, committees, councils, and schools. As was noted in our literature review and historical analysis, there is also a tradition of government interaction with international actors in the history of Brazilian education (see Kauko et al. 2016). We spent three periods in Brazil: March to July 2015, October 2015 to January 2016, and September to October 2016. The research data include documents, interviews, and observations.

The Brazilian documents we analysed ranged from reports, decrees, laws, regulations, plans, and official discussion papers about education and QAE in Brazil to websites, online newsletters, Internet news, and videos by international organisations (e.g., the Organization of American States (OAS), the Inter-American Development Bank (IDB), the OECD, the United Nations Educational, Scientific and Cultural Organisation (UNESCO), the United Nations Children's Fund (UNICEF), and the World Bank), other international actors (e.g., the Pearson Foundation, the Inter-American Dialogue Network, and BRICS), the federal government, national agencies, the Santa Catarina government, the Florianópolis government, third sector institutions, civil society movements, and private organisations. For each of the three selected public schools (see Chapter 7) we also analysed school documents (e.g., the Pedagogical and Political Plan) and data concerning these schools made available by INEP and private organisations (e.g., QEdu), along with websites, news, videos, photos, social media, and other materials provided by schools.

Similarly, the number of interviews reflected the breadth of the Brazilian education field and its ease of access (see Appendix 1). All interviews followed a semi-structured approach based on the interview guidelines. Interviewees formally consented to the interviews, which were recorded and later transcribed. School interviewees were selected within each school community for their different roles in respect to QAE policies and practices, and we attempted to cover all involved actors (administrative staff, teachers, students, and parents). We undertook eight weeks of observations in schools, carried out in three periods: 1) before interviews in schools, to familiarise ourselves with their environment, actors, interactions, and daily routine; 2) when interviews were conducted, to pay special attention to the national test examination, classes, and school staff meetings; and 3) having completed interviews, to follow the routine and identify the effects (if any) of the national test examination on the school environment. We observed classes, teachers' meetings, school council meetings, teacher training, external examinations, elections of school principals, end-of-school-year meetings, and daily activities. Additional visits were made to schools before the beginning of the fieldwork period and after its completion.

In Brazil, we were also able to make observations at meetings and events organised by sub-national and local governmental offices and third sector and civil society institutions. We observed two weeks of the State Council of Education of Santa Catarina's work, which included special committee meetings, the meetings of the presidents of special committees, plenary sessions, and the daily routine; one working day of the Municipal Council of Education of Florianópolis, including the monthly meeting of municipal councillors; one working day of the City Council of Florianópolis, including the Education Committee meeting; two working days of the Movement Santa Catarina for Education, which included the Fourth International Seminar of Education organised by the Confederation of Industries in Santa Catarina (FIESC) and FIESC's plenary session; and one monthly meeting of a neighbourhood civil society association. Informal interviews were conducted with relevant actors (some of whom were also formally interviewed). These informal interviews were neither audio-recorded nor coded but were considered as observation notes.

In China, as Chapter 3 explains in more detail, despite increasing decentralisation, the educational system remains highly centralised. The Ministry of Education takes the leading role in organising and governing education development. The QAE functions of the Ministry of Education are performed by two sub-systems, the supervision system and the national assessment system. NGOs play a limited role and are required to coordinate their activities with the state's requirements. At the same time, policymaking in China actively involves experts, especially from academia. Because of these specific features of the QAE system, the fieldwork in China included interviews with both government actors and experts at the national, sub-national, and local levels.

The initial research design included a larger number of interviews in China. However, despite official claims that the country is opening to the world, the attitude to foreign queries remains cautious and reserved. We were not permitted to speak to policymakers in the higher echelons of the Ministry of Education, so we had to compensate for this by focusing on more accessible actors and information from open sources, such as official documents and media publications.

We conducted the first period of data collection in China in June and July 2015, when we undertook interviews, workshops with local inspectors and politicians, and four school visits in a selected city. We also interviewed sub-national actors from NAEQ (National Assessment of Education Quality), the local bureau of education, and the supervision office. In the second period of data collection, in March 2016, we conducted interviews at the Ministry of Education, NGOs, IGOs, and with more researchers working as consultants and experts in the supervision system. We also conducted two further interviews with principals.

We collected Chinese national documents related to QAE and the main education policies issued by the Ministry of Education, the central government, and the national supervision office. The Chinese government's five-year

strategic plans guide the direction of educational development. We analysed national plans from 1980 to 2010 and the ten-year plan for the period from 2010 to 2020, which aims to transform schools' examination and evaluation culture. We also analysed the Law of Compulsory Education (1986, 2006, and 2015), the annual work plans of the Ministry of Education from 2007 to 2016, Supervision Decrees (1991 and 2012), and National Supervision Reports from 2005 to 2015. Apart from these documents, we analysed the websites of the Ministry of Education, NAEQ and sub-national level bureaus of education, and the public speeches of national leaders and the minister. We collected bulletins (in total 54 issues to the end of 2015) from NAEQ's website, in which the latest assessment results are published with information about assessment events, training, and collaboration with foreign organisations and researchers. We also analysed reports from international organisations (the OECD, UNESCO, UNICEF, and the World Bank, a total of eight reports dealing with China and QAE), and Chinese NGOs working on QAE issues, as well as these organisations' websites. At the local level, we analysed the websites of education bureaus, archived documents, and local implementation plans for national policies. School websites were the main source for school document collection.

Given the restricted access, QAE-related seminars and school visits became an important additional means of collecting interview and observation data in China. The team organised a conference to publicly discuss Chinese QAE with key actors, such as inspectors and decision-makers from local supervision offices. Attendees represented a wide range of actors from the national to local level and included core planners and local policymakers. Information from lectures and discussions was recorded and collected as part of the data. School visits facilitated data collection at the school level. Visits typically started with a workshop on school QAE practices for principals and teachers. The schools' presentations were followed by a discussion about the project's interview guide, with the emphasis on "actors", "changes", "challenges", and the "future". Some visits were joined by local researchers cooperating with the schools. Visits also included school tours accompanied by teachers or principals. Some schools prepared programmes performed by students and visits to classrooms and laboratories.

In the Chinese research environment, special attention was paid to the gradual building of trust in local communities, as there were doubts about the intentions of our research and our interest in their localities, and expectations of a formal government letter of introduction justifying our undertaking of research in China. However, we met challenges in obtaining this from the Chinese central government (see the next section on our research journey). To secure communities' trust, we clarified that data collection was intended only for academic research, emphasised our strict commitment to research ethics, and promised to maintain the anonymity of interviews.

The national QAE arena in Russia comprises a range of government agencies and research institutions subject to or contracted by two key state actors: the Ministry of Education and Science and its subordinate organisation

Rosobrnadzor (the Federal Service for Supervision in Education and Science). The career paths of many QAE experts include academic and government positions at the national or sub-national level and sometimes involvement with international organisations. It is therefore difficult to draw clear distinctions between the roles of interviewed individuals and the levels at which they work. Other actors, including media, publishing houses, teacher associations, and private companies, perform more specific functions within the QAE system, such as developing rankings, evaluating national test materials, or organising training for schoolteachers. International organisations' presence in Russia is currently limited (for more on actors, see Chapter 4).

National-level interview data in Russia were collected in two periods, in June and October 2015. Data at the sub-national and local levels were collected in four periods in a total of eleven weeks. A one-week piloting visit to Cheboksary in November 2014 included interviews and two school visits and was followed by three periods of participant observation in schools and local-level interviews in May and June, October and November, and December 2015.

Documents analysed at the national level included government programmes, reports, decrees, curricula, newspaper articles and news items, presentations and speeches by relevant individual actors, video seminars, and government agency press conferences. We also followed discussions at Russian academic seminars, in person and online. The development of the QAE system in Russia was also traced through a review of academic journals and books in Russian from 1990 to 2014 (see Gurova, Piattoeva, & Takala 2015). These forums included academic publications and expert discussions and essays by researchers, teachers, and members of parliament. At the sub-national level, we analysed documents issued by the Ministry of Education of the Republic of Chuvashia and its Center for New Educational Technologies, including laws, regulations, guidelines, plans, and public reports. Locally, we analysed programmes, work plans, information circulars, the public reports of the Department of Education of Cheboksary and the city's Center for Monitoring and Development of Education, and school regulation and action plans. We also analysed the websites of local organisations and schools.

The significant influence of national academic experts on QAE system development, as well as their interest in our study, explains the large number of interviews with experts in Russia. However, we experienced difficulties in accessing *Rosobrnadzor* and its subordinate institutions, so their work was largely covered by document analysis and review of websites and media sources. Locally, schools proved the most accessible and cooperative actors, while most officials of municipal institutions were reluctant to participate in the study. Data about municipal organisations were therefore gathered either by document analysis or interviews arranged with the help of schools; school administrators also shared their perspectives on the work of the supervising authorities. Semi-structured interviews at all levels were based on the common interview script (see Appendix 3), which was modified and developed according to each interviewee's expertise. At the school level, we also conducted several unstructured informal

interviews to complement our participant observation. Formal interviews were audio-recorded and transcribed, and written notes were taken during informal interviews and observation.

Participant observation periods were selected with the intention of including all the main evaluation procedures in schools. Procedures were identified from policy documents about QAE and from schools' work plans: state examinations after grades 9 and 11, subject Olympiads and contests, and internal school examinations and assessments (e.g., end-of-quarter or end-of-year tests). Two public schools in Cheboksary were observed, with observations of classes, meetings, internal examinations, and everyday activities. Interviews were conducted in these and three other schools. We also observed three municipal seminars for teachers. When a preliminary analysis of the collected data had been made, we organised a follow-up seminar for the two observed schools, at which our preliminary research results were presented and discussed.

Qualitative content analysis of interviews and documents

Qualitative Content Analysis (Mayring 2000; Hsieh & Shannon 2005; Schreier 2012) is instrumental in systematising extensive data. Our coding frame allowed us to index and arrange research material in manageable pieces and helped to build the different *foci* of the research questions, such as identifying all actors and the descriptions of their relations. However, most of the codes were developed in an iterative process and based on the research data. The project's organisation meant that emphases differed slightly in the different countries. Analysis of documentary data and interviews differed, for example, when interview data were thoroughly coded and documentary data were not.

In the Brazilian case, documentary analysis was made throughout the research process, taking into consideration the project framework, the preparation of interviews, and the subsequent concept-driven and data-driven coding of interviews. The documents were thus analysed by the thematic issues relevant to the analyses over the research process. Thematic analysis was undertaken to systematise the data. It also served as background information which contributed to the tailoring of interview questions and literature reviews. The Chinese team also undertook a discourse analysis to analyse Chinese political problematisation in school education. In the Russian case, a thematic analysis of documents was undertaken. National and regional regulations, guidelines, and reports, as well as Russian academic journals and books, were analysed before conducting interviews to inform the latter. Other types of documents were analysed throughout the research process.

Interviews were exhaustively analysed. The intention was to reduce the material under scrutiny systematically and flexibly. We thus used a mixture of deductive and inductive logics, i.e., the coding was both concept and data-driven. The starting point of the coding process was the main four themes guiding the interviews, which in turn were oriented by the research questions. This framed our coding view – what we were looking for – and frequently the

definition of the main categories. The coding proceeded with a data–driven approach, as most of the sub-categories, and even many categories, were then generated according to what the material provided. To give a brief example (see, however, a comprehensive explanation of the coding process in Appendix 2), in the Chinese coding, we include the main category of "actor", which corresponds to one of the four initial themes. The sub-categories "teachers", "experts", and "policymakers", however, emerged from the material. Nevertheless, since we decided to code all "changes" under the same code, changes in actors' positioning or roles were also coded under this category, while under the category "actor", we included for the most part the description of the actors provided by the interviewees. In the three teams, the exhaustive coding of the interview material thus combined deductive and inductive reasoning.

Research journeys – another layer of research data

The different perspectives on reflectivity in this research project were described in this chapter's introduction. One of the goals generated from these ideas was to be alert to the political and ideological roles of research, as well as the representations and authority produced in the study (Alvesson & Sköldberg 2009). These goals are demanding in a large research project. It is equally difficult to report them because reflectivity has occurred throughout the various project meetings and writing processes. Another layer of complexity is added by the fact that we research practices which themselves capitalise on scientific discourses, collect data, and claim to construct better policy based on firm scientific evidence.

In this sub-section, we illustrate some of the reflective perspectives by turning the focus on ourselves as researchers collecting research materials and analysing complex phenomena in the cultural and political contexts of our three countries. A starting point is that researchers are not detached external observers of their study but are incorporated in the field in complex and sometimes unpredictable and even incomprehensible ways (see Holstein & Gubrium 1995; Walford 2012). Researchers then undergo negotiations with others and themselves about ethically sustainable or practically manageable compromises in positions, accesses, and roles.

We observe that reflection on the QAE research process can illuminate the workings of QAE itself. We attempt to produce an interesting additional layer of research data. This supports the assumption that self-reflection on the ambiguities of fieldwork is only relevant if it can move beyond mere revelation (Alvesson & Sköldberg 2009; Koning & Ooi 2013) and is "essential to the argument" rather than being "a decorative flourish" (Behar 1996: p. 14). Thus, in this sense, it enables "a fuller and deeper representation of the groups and communities we aim to understand" (Koning & Ooi 2013: p. 30).

All the researchers engaged in the fieldwork wrote short personal histories of their fieldwork experience, considering fieldwork in the broadest sense of the term – not only as being "in the field" but also as fieldwork preparation,

corresponding with potential respondents and collaborators, and collecting background material. These very diverse stories, some more elaborate and personal than others, captured memories which expressed the puzzling or satisfactory details of fieldwork, as well as complex feelings and thoughts that broadly responded to the question "What characterised my involvement in the accumulation of data about QAE politics in Brazil, China, or Russia?" In engaging in producing and analysing these texts, we hope to bridge the border between researcher and subject, attempting to document and make sense of some of our own experiences on the journey. Considering the outcomes of our research thus meant addressing "the processes that allowed such research to happen" (Bondy 2012: p. 587). In referring to these stories, we use the country code to indicate the team from which the author of the text comes.

Coping with politics and bureaucracy

Brazil underwent great political instability during the project. The political turbulence suffered by the government of Dilma Rousseff (January 2011 to May 2016) led to frequent changes in education ministers (six ministers and one interim minister). This instability culminated in her impeachment and Vice-President Michel Temer assuming the presidency. In one case, following a sudden change in the national minister of education, interviews already planned and arranged at lower than ministerial level proved possible, but higher-level civil servants (e.g., departmental secretaries), who changed one after the other during the ensuing months, remained inaccessible:

> Once back to work in Florianópolis, keen to regain the lost days, I directly began with follow-up emails and phone calls. But suddenly, something was weird: my contacts in the Ministry of Education were silent; I barely could pass through the receptionists, and when I managed to do so, it was only to get to someone's secretary.
>
> (BR)

Although the first moments of political uncertainty in Brazil affected the data collection phase, the subsequent ones affected the topicality of our research findings. A year after our fieldwork was conducted, the new Temer Government annulled some education reforms, including the decree on the National Evaluation System of Basic Education (grades 1 to 12). The construction of this system took years of societal effort; its termination took a single day. When it was annulled, we had just submitted a journal article for review which partly addressed the establishment of the new system (Centeno, Kauko, & Candido 2017) and were left wondering how the gap between fast-paced political development and the usually slow-paced publication process might be bridged.

On the one hand, we conducted our research amidst political instability, and this turmoil affected school work: interviews with teachers and school staff took place during a strike against the government's attempts to remove

some of the teachers' rights. We also encountered difficulty in receiving ethical clearance for school fieldwork. On the other, our general experience was that most Brazilian actors were easy to approach. Despite the instability at the school level, interviewees were quite open to participating in our research. Whereas the political changes made it difficult to access the politicians and higher civil servants who simultaneously occupied government positions, contact with politicians and civil servants who did not hold such posts during the fieldwork was less complicated. In Brazil, these actors remain connected to the political world by occupying either leadership positions in municipal, state, or federal governmental bodies or expert or administrative positions in tertiary sector organisations. We therefore received largely favourable responses to our interview requests from international organisations, representatives of national NGOs, politicians, and leading civil servants.

The seal of official approval plays an important role in contemporary Chinese society, to the extent that in some instances, it is almost impossible or at best risky to proceed without it. However, the required stamp is often submerged in a sea of red tape. In dealing with government matters, the process is usually very time and energy consuming, especially as there is no official one-size-fits-all protocol concerning how one should proceed in obtaining research authorisation. With all this in mind, our team decided to attempt to receive approval at the national level, as we expected such a document to open doors all the way to the level of individual schools.

> We anticipated personal contacts, firm backing of the Finnish national academic research funder – the Academy of Finland – and the ongoing expansion of bilateral cooperation in education between Finland and China to guarantee support from the high level of command. While the Chinese Ministry of Education found it hard to locate the department best fit to authorise our fieldwork, the unexpected change of personnel in the relevant department and the anti-Western(isation) campaign that swept over the education system quickly hampered our efforts. Our permission was denied, meaning that we would not access any ministerial official or civil servant working on educational matters. However, a successful cooperation agreement with a Chinese university secured access to academics and subnational units relevant for our research topic, while the officials remained out of reach.
>
> (CN)

The Russian military intervention in Ukraine and the subsequent annexation of Crimea, which began in 2014, resulted in Western and Russian sanctions and counter-sanctions. These unanticipated political events unfolded during our interviews in Russia. Military action, the Russian law restricting the actions of "foreign agents", and the subsequent Undesirable Organisations Bill all fed into a general atmosphere of caution and uncertainty regarding how to respond to visit and interview requests from researchers supported by a Western university.

On our introductory visit to Cheboksary, the state-level officials were, however, open to meetings, often expressing excitement about possible collaboration with a country whose education system was ranked among the best in the world by the PISA study. Some of our official respondents had participated in earlier World Bank projects and remembered international collaboration as professionally rewarding and a personally exciting exchange of experience. However, we were informally reminded that the current political situation meant that not everyone would be willing to be associated with international research because of the possible personal consequences. In this complicated context, the team often discussed the fact that to gain trust, we needed to counteract two preconceptions. The first was that because we came from a country of high education quality, as measured by PISA, we would come to a country performing less well with a judgemental attitude and with the intention of comparing the "successes" of Finland with the "failures" of Russia. We felt our partners positioned us as experts, which made us uncomfortable and which we found unnecessary. Second, we had to prove to the research participants that their openness to our study would not cause them harm either because of the climate of suspicion towards foreign actors or the systems of control embedded in QAE politics and its diverse institutional and personal effects.

In the Russian case, personal contacts at the national Ministry of Education and one of the leading universities in educational research were crucial to accessing some ministerial officials and educational experts in Moscow and provincial administrative and school staff. However, while we were able to interview ministerial civil servants, we failed to secure access to the agency functioning under the jurisdiction of that national ministry, which controls several sub-agencies responsible for the implementation of national examinations and other QAE procedures. Expecting Russia to function hierarchically, we secured a reference from a very high ministerial official, thinking it would open doors at the lower command level. While the HR department of the agency was quick to answer emails and phone calls, we were told that personal interviews with staff were not allowed, while written responses could be collected from relevant respondents identified by the agency itself. We were told that these responses would then be reviewed by the head of the agency and sent to us in summarised form.

At this point, the Russian team faced an ethical dilemma: Should we give in to this proposal, which would provide us with relative access while risking our reputation as an independent research team and allowing the agency to use our research to engage in what we saw as direct control of its own personnel? The situation echoed what Koning and Ooi (2013: p. 29) describe as transferring research "into another agenda", which we were unhappy with. Following a lengthy team discussion, we decided not to engage in this process, shifting our main focus to the local level, documentary and media analysis, and interviews with academic experts and, among others, retired officials, politicians, and civil servants who no longer held politically sensitive posts. While we still fail to completely understand the reaction of an agency which presents

transparency and accountability as its main functioning logic, we see it as a manifestation of the closeness of the "centres of calculation" to public view, as well as a signal of the volatility of the actors who themselves sat amidst vast hierarchies and were constantly worried about job security (see Kipnis 2008). The head of the agency who denied us access had succeeded another young functionary who held his post for only a year and was dismissed for allegedly failing to combat high levels of cheating in examinations. Our project started when the current leader had held his post for a year and was perhaps mindful of his predecessor's fate (see Piattoeva 2016; Piattoeva 2017). This and other situations alerted us to the importance of paying attention to the agendas and interests of active or passive research participants in relation to fieldworkers and the overall research topic.

Although all three countries appear quite dissimilar in their openness to academic research by foreign scholars, we found our aim of interviewing actors who were part of official government structures and securing research authorisation was very uncertain and depended on situational or external elements, no matter what official procedures were in place. Cultural proficiency, knowledge of the political context, and constant readiness to alter plans and seize sudden opportunities were indispensable in securing successful fieldwork. At the same time, we interpreted silence or failed access as a form of engagement which revealed something about the system we were studying, providing important data and findings concerning the problems of access which reflected the broader social milieu (see Bondy 2012).

The bureaucratic pressure faced by the three teams during the initial stage of making contacts, securing the necessary research permits, and accessing relevant respondents was an important experience which enabled us to live and feel our way through some of the processes later described to us by the research participants as burdensome demands of various evaluation processes and data collection requests emanating from different stakeholders. Emotionally, we were able to relate better to the feelings of frustration, scepticism, or amusement such processes inflicted. Some of us experienced the bureaucratic processes as tricky but surprisingly seductive in their nature and in their effects on subjectivity.

Manifestations of hierarchies and effects of QAE

The schools to which we were invited on our introductory visit to the city of Cheboksary and which later became the prime observation and interview sites for our fieldwork were motivated to engage in our study by the opportunity to strengthen their local image and exploit cooperation with foreign researchers to gain credibility with the municipal authorities. Local reactions to foreign cooperation were thus far from univocal, despite the geopolitical upheaval. During our school visits, we sometimes felt that a show was being put on for us and that school principals were deliberately promoting a good image (as they saw it). This experience was shared by the teams visiting schools in both Russia

and China. As we later discovered, emphasis on positive image and reputation are essential to understand the impact of QAE and the reaction of schools and teachers to it, meaning that it would be too narrow to interpret these local reactions without consideration of the strategies for coping with QAE. Put simply, school staff initially interpreted external visits within the framework of quality evaluation and reacted to our interest accordingly.

One of our team members reported after her first day in the field in Russia in the following words, alerting us, among other things, to an intriguing parallel between our research and large-scale international assessments:

> On Friday I met with the school principal and her deputy, who will be my contact person for this stay. The principal stressed that they need some official document – from the local Ministry or from our University – explicitly stating that their school participates in an international study. As the deputy principal explained later, their participation in international studies counts as the so-called project activity and gives them privileges in regional rankings, and even additional funding. So that is their main motivation to take part in our study. When schools participate in TIMSS [Trends in International Mathematics and Science Study] or PISA they get the same bonus.
> (RU)

Apart from obtaining recognition from the educational authorities, the Russian schools in our study could exploit their involvement in our research project in other ways. One of us made observations at the end of the school year and attended several graduation and end-of-year events. These included performances prepared by students and teachers and speeches from "honoured" guests, e.g., local entrepreneurs, members of the municipal council, and local administrators. The audience included school staff, graduates, and their families and friends:

> At the first graduation event that I attended I was invited to sit close to the stage. I prepared to take notes, as I normally did at lessons and meetings, and did not expect any special attention. Suddenly, I heard my name and position ("a researcher from the University of Tampere in Finland") from the stage – I was listed among the honoured guests who were later to greet the graduates with some speeches. It was a complete surprise, and I had to quickly think about what to say. Later during my stay, another event was organised with even greater publicity . . . The purpose of the event ["The Stars of the School"] was to congratulate, honour and reward best-performing school students: those who had high academic achievements, won local learning competitions, led student organisations, etc. A deputy principal called me in advance and asked me to prepare a small speech. On the one hand, my position as an international researcher made me, in school administrators' view, a fit person to address the students. On the other hand, as I felt it, the school demonstrated its prestigious "international

cooperation" to a wider audience, including parents and local authorities in the audience.

(RU)

Teachers in Brazil were very enthusiastic and spontaneous when they were interviewed, which we interpreted as their sense that their voices were seldom heard. They appeared to share their thoughts without reservation and often seemed deeply animated by the topic of our research. Their emotional reactions to the questions might be read as shedding light on the very personal, troubling impact of some of the QAE-related policies on schools' daily work and the fulfilment of the duties teachers considered professionally and ethically desirable. Reflecting on individual interviews with teachers in general, some of our team members recalled situations in which teachers began to cry when they expressed their frustration and helplessness in dealing with mounting paperwork, which distracted them from "teachers' work" (Russia), and the unproductive education reforms and teachers' shrinking motivation (Brazil):

> She told me she had always welcomed reforms, as she thought they would be the outcome of well thought problem solving, and she would cooperate to implement them. However, at the moment, for the first time, she said she is hopeless. . . . "Politicians are not trying to make anything better for anyone [there is a lack of resources and lack of will], but now even teachers are so demotivated that they are not coping with the education mission." She links this demotivation to the vulnerable career of educators, who are badly paid and need to work several shifts to provide minimum income for their families. She told me they are always tired, they are not respected in the society and, recently, neither in the classrooms. She acknowledged that they are held accountable for so many things concerning teaching and learning, but complained that, at the same time, they lack autonomy over their jobs and are blamed for everything that goes wrong at the school.
>
> (BR)

Although the researchers were caught off-guard by interviewees' emotional distress, they also felt that by asking difficult questions and allowing the respondents to express their anxiety, they were able to give something in return – a momentary emotional relief and a sense that thoughts and feelings mattered: "In the very moment when their supervisors were putting pressure on them, demanding good examination results and completed end-of-year reports, I was there to listen and sympathise" (RU).

In China, in group interview situations, teachers' voices were often silenced or overshadowed by senior staff members answering questions on their behalf. This supported the idea that there was a silent rule that speaking priority followed the hierarchical order: senior staff, senior teachers, and junior teachers. If not addressed directly, most junior teachers waited for senior members

to answer first. Group meetings' interior dynamics seemed to characterise the hierarchy of the teaching staff.

> In one of our group meetings with both senior and junior personnel, new teachers always had to wait for the senior teachers to talk first unless directly nominated to answer the question. We addressed a question to a new teacher, and he/she immediately suggested that a senior teacher should answer it, explaining to us that the senior teacher might know better. This younger colleague only started talking after the senior teacher declined to answer and recommended that this new teacher should answer.
> (CN)

Our observations suggested formal promotion led to differences in the staff hierarchy. Senior staff members had once been teachers. When they were promoted to the school administrative or management level, they started to behave and were treated as experienced and authoritative teachers, especially by newly recruited teachers. Levels of experience and status were transformed into informal authority. However, there were some variations. For example, in our group interviews, we encountered cases where senior staff answered one question and young teachers challenged the answer with a different perspective.

These authority dynamics changed when the group attendees included staff from supervisory bodies or government. In such situations, inspectors became the authority and retained the right to answer questions first. If there was a difference of opinion, school participants tended to keep silent. For example, there was one case where our research team asked about the challenges of QAE for teachers, and an inspector answered that "good teachers don't have problems, only bad teachers do" (CN-S-05), silencing the whole group and preventing further answers.

Conclusion: the research's room for action

We started this chapter by emphasising the need for reflection in research and placing our work more systematically within the CADEP framework. Having discussed the practical work of our analysis, we turned the analysis on ourselves and presented an account of our multifaceted research journeys.

We have thus demonstrated that the conduct of this research could not escape each case's basic political dynamics. In other words, we felt the limits of our own room for action in these three contexts. We aimed to learn something from this experience about the phenomena we were studying.

The changes in our contexts' political situation were described by revisiting difficulties in accessing the field and observing that these challenges were entangled in the changing politico-bureaucratic conditions. What we could do and how others perceived us were influenced by the ways in which the study of QAE cut across QAE procedures and their impact. This crystallised the

ambiguous political and ideological role of social science research in general and research focused on quality politics in particular.

Our room for action in concrete work and research was linked to multi-faceted questions of authority. As researchers, we were often concerned about how our research might jeopardise participants' positions. This represented a serious challenge to our work, which we addressed with a consistent anonymity procedure. We could also see power relations at play during our fieldwork, in which some voices were silenced and others amplified. However, we were also able to shed light on the ways participants could find avenues for momentary empowerment through our research. This sometimes happened when our research team's presence was used as a sign of quality or interviewees used our interviews as moments of reflection and inspiration or simply of emotional and professional time off as some heavily burdened teachers did.

As researchers striving for access and recognition, we experienced state authority and bureaucracy which replicated the ways in which QAE systems in each country worked: the chances of gaining access, the strength of the state in controlling the lower levels of bureaucracy, and the way top-down management worked. The research journeys also indicated that QAE as a governance tool left room for action for those it affected. As Chapter 7 demonstrates in more detail, schools have become experienced in playing the game of quality and can use an international research project to their advantage.

In the following chapters, we start to analyse the dynamics in the politics of quality in Brazil, China, and Russia. To assist our reader in navigation, in Figure 2.1, we sketch an approximate map of how intensively the different chapters deal with the various dimensions of our analysis. Chapter 3 describes the relevant aspects of the changing political situations in each country or the historical-social developments which underpin their respective paths to QAE. Chapters 4, 5, and 8, analysing the national level, lean slightly more towards
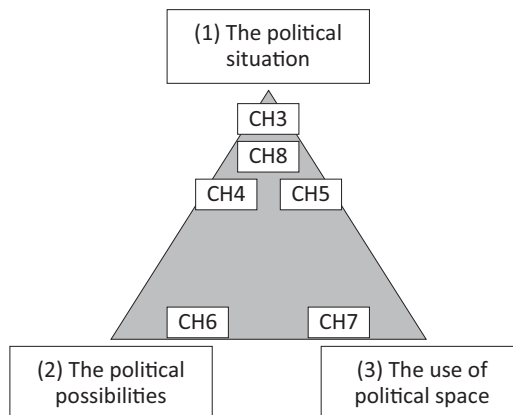

Figure 2.1 Dimensions of the analytical framework (CADEP) and the book's chapters

analysing the political situation, whereas Chapter 6 leans more towards the political possibilities created in data use, and Chapter 7 scrutinises schools' political space. In Chapter 9, we bring the idea of dynamics to bear on understanding how these analyses of the three dimensions can be drawn together to construct arguments about the dynamics of QAE policies.

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