

Quality Assurance and Evaluation through Brazilian lenses: an exploration into the validity of umbrella concepts

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Quality Assurance and Evaluation through Brazilian lenses: an Exploration into the Validity of Umbrella Concepts

In our present research we address the question of whether it is valid to apply the QAE (Quality Assurance and Evaluation) umbrella concept, which was formulated to explain new phenomena in European educational governance, to similar developments in Brazilian basic education. This led us to reflect on the possible pitfalls and potential strengths of using umbrella concepts as analytical tools. This article presents this exploration and its operationalization. We confronted in-built assumptions in QAE with the contested, consensual and creative use of the notion of quality in Brazilian basic education, and looked for relationships. Our analysis shows that the Brazilian developments reiterate the relationships concerning global interconnectivity, and challenges those pertaining to conformity. We argue that the main risks of using umbrella concepts seem to concern the re-production of understandings, which frequently leads to the disregarding of deviation.

Keywords: Brazil, quality, basic education, umbrella concepts, evaluation, measuring, large-scale assessments, World Bank, SAEB, CAQI

The question of quality has been on the education agenda for decades. Internationally, prevailing quality-measurement practices (Simola et al. 2013) form a new ‘mode of governance’ by comparison (Nóvoa and Yariv-Mashal 2003), while nationally they are an addition to the traditional legislative, economic and ideological steering (Lundgren 1990). However, conceptualising such wide notions as quality or evaluation is rather challenging. Indeed, in research there is little consensus, for example, on methods or theory of evaluation (Grek, Lawn, Lingard and Varjo 2009; Vestman and Segerholm 2009; Dahler-Larsen 2012;). These slippery notions are difficult to define because as

phenomena they are multidimensional social constructs. There is always more than one practical meaning for quality, for example, and quality itself hardly provides a basis for choosing among them. This is because the notion of quality splits into many dimensions – of how and what is considered quality, for whom and according to whom – that vary in line with specific socio-cultural and historical conditions. In addition, such slippery notions are difficult to problematize because they are inevitably related with ‘distinct notions, each an element in its grammar’ (on the ‘structural grammar of equality’, see Rae 1981, 18). Depending on the research perspective and context, these notions’ content, as well as their claims, might greatly differ. This ambiguity is simultaneously the weakness and strength of such notions as quality and evaluation: their understanding might radically differ in antagonist circles, while their acceptability as an ideal is rather undisputed.

In research, one way of dealing with this definition problem is to create umbrella concepts that clearly refer to a specific procedure or set of practices, while simultaneously describing the phenomenon and conceptualising its general dynamic. One example of such umbrella concepts is that of Quality Assurance and Evaluation (QAE). The concept of QAE might refer to different practices with varied meanings (e.g. self-evaluation procedures, audits, inspections, assessments, benchmarks, indicators, governing and steering tools), and is used diversely according to research contexts (e.g. Trivellas & Dargenidou 2008; Yamaguchi & Tsukahara 2016). Still, in the education field, a group of scholars particularly coined QAE with the aim of enhancing understanding of educational discourses and policies that both define and develop quality in education and how it is measured. These authors framed, what we call here, the umbrella concept of QAE, because they share the view that quality is brought to light through measurement and comparison. Albeit approaches and

terminology vary (Simola et al. 2009, Dahler-Larsen 2011), in their view, quality is no longer extraordinary but becoming “simply what can be expected... quality is conformity with standards” (Ozga et al. 2011b, 2). The notion of quality is being operationalized through standardised measurement, mainly manifested in large-scale assessments. Thereby, the QAE discourses, policies and practices, (re)create meanings, justify or motivate change, enhance or undermine political possibilities, reconfigure central-local relationships and redefine governments’ responsibilities, among others dynamics. QAE emerges thus as a timely and promising umbrella concept, which bears the capacity to refer, describe and conceptualise some of today’s most important educational phenomena and their dynamics.

Hence, a consistent use of QAE umbrella concept in educational research benefits largely from drawing on the view of the authors who framed it. In doing so in our present research,¹ we were yet confronted with another line of reasoning: QAE has a particular intellectual affiliation. QAE was conceptualised by a group of authors working in and on European countries (e.g. Ozga 2009; Simola et al 2009). In fact, the European research project ‘Fabricating Quality in Education’ (Ozga et al. 2011a) used QAE as a framework to account for national and regional developments (e.g. Grek et al.

1 This article contributes to the analysis of educational developments in Brazil within the “Transnational Dynamics in Quality Assurance and Evaluation Politics of Basic Education in Brazil, China and Russia” project (Academy of Finland grant 273871). The main research objective is to explore how the intertwining of local, sub-national, national, regional and global scales constructs the local dynamics in QAE politics, and thus shapes local learning environments in the case countries.

2009) related to the broad phenomena of Europeanization and governance.² This raises the question of whether QAE would serve as an umbrella concept through which to make sense of educational developments in contrasting sites. In tackling this question, we reflected on the possible pitfalls and the potential advantages of using such umbrella concepts as analytical tools. The aim in this article is to relate this reflection and its operationalization to the study of QAE and its manifestation in Brazilian basic education. In sharing our reflections and findings, we intend to contribute to current discussion about the challenges that research programmes are growingly facing in the global era.

Problematizing the use of umbrella concepts

The sociology of knowledge contests the rootedness of scientific knowledge. There are strong contingent relations between scholarly activity and its socio-political historical background. They are visible in the persistence of varying styles depending on the scholar's intellectual and geographical affiliation (Charle, Schriewer, and Wagner 2004). Educational knowledge is always produced with reference to particular educational experiences and contingent on particular dynamics, regardless of whether it is generated in international (e.g. Centeno 2014), national (e.g. Beech 2011) or sub-national (e.g. Santos 2006) contexts.

² The Fabricating Quality in European Education (FabQ) project was funded as part of the 'Eurocores' programme of the European Science Foundation (ESF). It comprised linked national projects in Denmark, Finland, the UK (England and Scotland) and Sweden, and was co-ordinated by the Centre for Educational Sociology, University of Edinburgh (see the project website for further information: <http://www.ces.ed.ac.uk/research/FabQ/index.htm>).

In fact, educational studies have influenced educational reforms on the ground as much as having been influenced by them (Nóvoa 2001), and research in Comparative Education (CE) has mirrored ‘history’ as much as having been inspired by it (see Cowen and Kazamias 2009, Cowen 2014a). If the production of educational knowledge is contingent, how can we engage with umbrella concepts such as QAE in comparative research?

These considerations notwithstanding, we have observed the emergence of new forms of scholarly knowledge (Wagner 2004). Comparative studies are no exception. Scholars have moved from plain comparisons to more elaborated research designs (Schriewer 1997, Nóvoa 2001), considering the relationship between globalisation and education through the prism of interrelated multiple developments (Schriewer and Martinez 2004) and cross-national policy spaces (Carney 2012), among other concepts. In spite of their diversity, recent approaches seem to share a quest to shed light on the constitution of global horizons of action and thinking, and their impact on today’s educational life (see e.g. contributions in Resnik 2008, Cowen and Kazamias 2009, Schriewer 2009, Steiner-Khamsi and Waldow 2012). Global agendas (Dale 2000) and reform movements (Sahlberg 2011) are thought to shape educational phenomena. Umbrella concepts such as QAE seem particularly relevant from this perspective given their potential to reveal something about the ‘context of the context’ (Dale and Robertson 2012, 27). They facilitate the relating of seemingly unrelated policies and practices, thereby shedding light on educational processes in the current global era. How, then, could we use such umbrella concepts as QAE without falling into the trap of assuming their rootedness?

Our strategy is to place the problematisation of the umbrella concept concerned at the centre of the analysis. In reflecting about the possible pitfalls in the uncritical use

of umbrella concepts, we found that our considerations resonated with critical reflections in our field of study, as well as in sociology and post-colonial studies.

Turning pitfalls into strengths: an analysis of in-built assumptions in QAE

In the field of CE, discussions about how the latest educational developments should be understood have crystalized around two factions comprising those sympathetic to and sceptical about the world culture perspective, although multiple nuanced positions are to be found. The literature is extensive and well known (see e.g. Cowen 2014b) and it is of interest in this article only insofar as it has triggered critical questioning, some of which has inspired our own reflections.

Critics stress that world culture is based on taken-for-granted assumptions (Carney, Rappleye, and Silova 2012). Given that such assumptions are inferred rather than explicit, they imply a universal rather than a particular understanding (see Dale 2000). They constitute the basis of an all-encompassing conceptualisation that provides explanatory tools and explanations (Steiner-Khamsi 2012), but leaves no room for further elaboration, i.e. for refutation or exploration. They are critic-proof. Researchers using this framework tend to collect evidence that somehow corroborates initial generalisations, instead of testing them (see Schriewer 2012), and thereby risk reiterating and contributing to global policies. In other words, they risk mirroring their own object of study. Analogical criticism is useful in scrutinising empirically based umbrella concepts, such as QAE.

We elaborate our reflection under three nested pitfalls – implicit universalism, speculative generalisation and mirroring – and examined them in more detail below, first in relation to more general discussion and then as reflected in the QAE debate. For the analysis of the QAE debate, we draw mostly on the writings of the above-referred

authors who introduce this umbrella concept in the field of education. In this analysis we sought to identify the in-built assumptions in QAE. Such assumptions are inherent in umbrella concepts of any kind, and if undetected they might implicitly channel research practice and establish a source of bias akin to encountering the pitfalls we herein discuss. On the other hand, if they are discerned and explicitly addressed they become research strengths in terms of allowing further exploration. We adopt the view in this article that the potential of CE research lies in fostering explanation by confronting established all-encompassing assumptions with contrasting analyses (Schriewer and Holmes 1990), so as to establish patterns of relationships (Green 2003) or generate new suggestions (Dale and Robertson 2012). In line with this view we consider it essential to scrutinise the in-built assumptions in QAE according to the three potential pitfalls. We aim to use this analysis to build awareness of how the uncritical application of umbrella concepts – in this case QAE - might channel biased understandings.

For the sake of clarity, and at the risk of being repetitive in terms of theoretical referencing, we opted in organising this exposition according to the three pitfalls, whose arguments are successively explained and applied to the analysis of the QAE umbrella-concept. We present a systematisation of the identified in-built assumptions at the end of each section.

Implicit universalism

The first of these potential pitfalls is implicit universalism, in other words, the assumed adequacy of knowledge independent of space and time. This relates to questions of language and geography, and to how readership and research subjects are understood.

The use of language is perhaps the most striking example of how the production of knowledge is intellectually situated. In conducting comparative research, scholars have experienced and documented the situatedness of English-based conceptualisations

in making sense of educational realities (e.g. Popkewitz 1993, xi and 13). Effectively, actors draw on a set of historically built semantic resources in imagining and interpreting the educational phenomena (Schriewer and Keiner 1992, Bourdieu 2002, Crossley and Tikly 2004). Knowledge is heavily locally-constructed (Anderson-Levitt 2012), and even travelling concepts that have a seemingly neutral one-size-fits all elaboration carry ideological ballast (Popkewitz 2005). Any conceptualisation reflects specific intellectual and socio-historical positioning, and might therefore impair other research perspectives, as well as the understanding of diverse educational developments.

The QAE umbrella concept reflects this situatedness. As the terminology clearly conveys, QAE relates to the New Public Management reforms that took hold in English-speaking countries in the 1980s/90s (Hood and Jackson 1991, Lane 1997, Barzelay 2001, Simola et al. 2009, Ozga and Grek 2012), and was implemented in different shades in different countries (e.g. de Boer, Enders, and Schimank 2008). These reforms advocated an approach based on management by results and evaluation, leading to new social practices in the governance of education, implying a more market-driven education system and business-like governance (Simola et al. 2009).

Geography still matters even in a globalised world. Scholars have deplored the geographic affiliation of the main globalisation theorists who ‘continuously operate within Eurocentric planetary consciousness’ (Brah, Hickman, and Mac an Ghail 1999, 16), thereby shaping the way in which the theories are constructed and opposed (Hesse 1999). In CE, as explained before, debates about the locality of concepts stress the risk of assuming a universal understanding of the world: concepts reveal the context of their production. Indeed, the historical trajectory of CE research shows how context and affiliation have significantly influenced its conceptual construction (see Kim 2014,

Schriewer 2014, Cowen 2014b). The production of scholarly research is always context-bound (Wagner 2004).

There is considerable amount of research on how EU institutions and the OECD in particular contributes to the production and expansion of QAE through the collection of data and its use in world rankings (Carvalho 2012, Mulford 2002, Grek et al. 2009, Simola et al. 2013). Thereby, QAE sets standards and channels domestic policies. The OECD heads the global drive for performance assessment (Grek et al. 2009). Large-scale assessments – however defined – were already in place in most European countries (Lundahl and Waldow 2009, Simola et al. 2009, country reports in the KNOWandPOL project).³ However, it was mainly in the aftermath of these reforms and of related activities in international organisations (IOs) that quality measurement became institutionalised in everyday education-policy discourse in the 2000s (Henry et al. 2001, Walters and Haahr 2005, Lawn and Grek 2012).

The question of whether the use of QAE in educational discussions and dispositions in Brazil might entail an implicit Eurocentric or English-based interpretation is of relevance to our study. The pitfall of universalism appears to apply particularly to the emergence of QAE. In this regard, the following in-built assumptions are identifiable: (i) the domestic emergence of QAE is related to the emergence of larger administrative and managerial reforms in the public sector in the 1990s, and (ii) is discernible in the renewed educational discourses through which quality was operationalized through its measurement in the 2000s; (iii) domestic QAE policies and practices are driven by OECD and EU activities.

³ KNOWandPOL was a project funded by the European Union. As of 20 July 2009, the reports and further information are available on the project website (<http://www.knowandpol.eu>).

Speculative generalisation

Closely connected with the first, the second potential pitfall concerns the speculative generalisations for which umbrella concepts prepare the ground and that convey overall descriptions of phenomena. Their application thus implies a certain characterisation of the object of study. This, in turn, might channel the understanding of differently situated developments in that researchers could fall into the trap of conflating similar features across sites to match general interpretations. As noted above in relation to the debate on world culture, CE scholars have tended to discuss this in terms of complexity versus convergence. For the purposes of this study, however, it suffices to point out the risk that research findings would ‘in some ways resemble photographs taken from high-flying aircraft; the main features stand out, but much detail is lost, and the detail may be important’ (Kingdom in Bennett 1991, 216). In a globalised world there is a good chance of falling into the trap of attributing too much explanatory power to perceived convergence.

Contributors to the QAE literature argue that the increasing use of QAE procedures has not led to convergence among European countries, which rather hold on to particular models according to their historical development (Simola et al. 2013). There is research evidence that the impact of international QAE policies is channelled through a domestic filtering process, in which they are entangled with or re-articulated through existing policies (Grek et al. 2009, Simola et al. 2009). Nonetheless, domestic terminologies vary along international lines: auditing, assessment, assurance, development, evaluation, inspection, management, monitoring, and planning for example (e.g. Kauko 2012). In the education context these accountability policies and practices translate into testing and indicators of performance (Ozga and Grek 2012) .

Given the purposes of our research, it is relevant to consider how the application of QAE could lead to the pitfall of generalisation by channelling the research to focus on similarities and analysing the findings accordingly. In the context of QAE this pitfall seems to be associated with its makeup, whereby another six in-built assumptions might be identified: (iv) QAE policies and practices are managerial in character, (v) hence education policies adopt managerial terminology; (vi) QAE is operationalized through performance assessments and indicators (vii) that are legitimised on accountability premises; (viii) international QAE policies are filtered in accordance with domestic traditions, (ix) however discourses follow the pathways mapped in the international framework.

Mirroring

The third potential pitfall confronting umbrella concepts in the global era is the mirror effect of their application (referred to as mirroring). The danger is that research reproduces what it scrutinises. Studies simultaneously describe and apply global interpretations, analyse and replicate global language, and investigate and exercise cross-national research. The thin line between researching and reproducing is striking.

For the purposes of this article, perhaps the most salient illustration of how educational research might mirror its own object of study concerns the role of experts, many of which are scholars, in the circulation of educational knowledge. Research on educational transfer has revealed a particular feature that is not bound to space and time, or to culture and policy: experts play a crucial role in enabling the transfer of knowledge. In other words, regardless of whether the focus is on earlier processes of schooling (Caruso 2010, Ressler 2010) or the current ‘global architecture of education’ (Jones 2007), on educational processes in China (Schulte 2008), Hispanic America (Roldán Vera and Schupp 2006), India (Tschurenev 2008), Mongolia (Steiner-Khamsi

and Stolpe 2006) or in the OECD ‘rich man’s club’ (Mahon and McBride 2008, Centeno 2014), experts appear to function as the ‘bridges’ (Steiner-Khamsi and Stolpe 2006) that convey knowledge across sites.

Do scholars function as bridges that facilitate the ‘international transfer of educational research modalities’ (Crossley 2014, 21) in this globalised world? The research practice of analysing developments worldwide through the lenses of concepts created to address situated empirical development bears indeed some resemblance to the object of study we denominate as ‘transfer’. Globalisation is challenging the construction of research programmes (Cowen 2000, Robertson and Dale 2008), as much as it is questioning research thinking: how far does the use of umbrella concepts such as QAE risk the reiteration of global policies?

In the context of Brazilian education this pitfall could relate to the analysis of the political possibilities that QAE triggers. In the European space, QAE provides ‘the overarching rationale for data production in terms of both accountability and increased performance’ (Grek et al. 2009, 5). Political alternatives other than accountability, managerialism and further performance assessment are not considered in the QAE debate. This might be understood as another (x) in-built assumption. If researchers use these political possibilities as lenses through which to study other developments, they might fall into the trap of feeding the exact neoliberal speak (the ‘planetary vulgate’, Bourdieu and Wacquant 2000) that they are referring to: they will certainly find what they are looking for, but will must probably also ignore anything else.

Brazilian lenses: parallels within a contrastive framework

Brazil is an interesting site in which to explore QAE as an umbrella concept. On the one hand, it unquestionably shows contrasting socio-cultural, economic-political and educational developments, thereby constituting a rich contrasting setting (see Schriewer

1990, Popkewitz and Pereyra 1994, Badie and Hemet 2001). On the other hand, such exploration is only possible because of the evident parallels in Brazil with the QAE conceptualisation, making further examination of the in-built assumptions possible.

After more than twenty years of dictatorship, Brazil restored democracy at the end of the 1980s. The new Education Law was established in 1996, and further elaborated in a comprehensive National Education Plan in 2001 and 2014. There has been an avalanche of changes affecting all levels of educational provision in recent decades. Complex and encompassing large-scale assessments have accompanied, motivated or maintained these changes (Kauko et al. 2016).

The use of the term quality to address educational matters is recent, however. The Brazilian literature clearly illustrates the increasing attention being given to quality in basic education ('ensino fundamental').⁴ For instance, in the course of our literature review (Candido, Kauko, and Centeno, submitted) we searched the Scielo database for relevant articles based on the keywords quality and education (using both 'educação' and 'ensino'). The number of selected articles concerning QAE in Brazilian basic education amounted to five in the 1990s, 73 in the 2000s and 91 in 2010-2014. This growing incidence mirrors the implementation (1990), reform (1995), consolidation

4 We are adopting the most common international classification of education, in which the basic level comprises primary or elementary education (first stage), and in some countries also lower-secondary education (second stage). This differentiates basic from pre-primary (early-childhood) education, and from secondary and higher education (International Standard Classification of Education, ISCED 2011, UNESCO). However, basic education in Brazil officially includes pre-primary ('educacao infantil') and secondary ('ensino médio') education, thereby corresponding to compulsory education. This means that alternatives to regular schooling are also included in basic education. Given the vast scope of basic education in Brazil, we have narrowed down our focus to regular elementary education ('ensino fundamental').

(2005) and enlargement (2013) of the Evaluation System of Basic Education (SAEB)⁵. SAEB was the first in a long sequence of policies to operationalize quality through large-scale assessments. It culminated in the new National Education Plan (PNE 2014-2024), which reiterates the goal in the 2007 Education Development Plan of reaching the OECD PISA mean score by 2021.

Brazil is currently vice chair of the PISA governing board, and the OECD describes the country as a model for improving education with the help of PISA (OECD n.d.): ‘in terms of progress, you [Brazil] lead by example’ (Gurría 2013). However, a common stance in Brazilian research is that the quality of education still does not come up to international standards (e.g. Oliveira and Araujo 2005, Durham 2010, Oliveira 2011). International observers classify the country as a developing economy (IMF 2015) with a poor public education system (79th position in the 2013 education index,

5 From 1990 until 2005, the assessment suffered several methodological changes. The most significant concerned the adoption of the Item Response Theory in the design and analysis of the tests in 1995. In 2005 the SAEB started to combine two large-scale assessments. (i) The National Evaluation of Basic Education (ANEB) was the first assessment implemented. It aims ‘to evaluate the quality, equity and efficiency of Brazilian education’ (INEP n.d., para. 2). It assesses a sample of pupils from the 5th, 9th and 12th grades, aiming at providing information to educational management. (ii) The National Evaluation of School Performance (ANRESC, ‘Prova Brasil’) has the goal of ‘evaluating the quality of education in public schools’ (INEP n.d., para. 3). It is applied to all 5th and 9th grade pupils in public schools and focuses on each school and municipality. Since 2013 the SAEB includes a third large-scale assessment. (iii) The National Evaluation of Literacy (ANA) targets the ‘assessment of the literacy in the Portuguese language, mathematical literacy and the conditions of the Literacy Cycle offered in public networks’ (INEP n.d., para. 4). The ANEB and the ANRESC are combined with the data from the School Census for the calculation of the Development Index of Basic Education (IDEB). The IDEB was created along with the 2007 Education Development Plan, and has a double aim of measuring the educational quality on all levels (from school to national), and of monitoring the national average educational achievement.

UNDP). Parallels between the Brazilian situation and the phenomena captured in the QAE umbrella concept are easily recognisable.

However, the contrasting Brazilian development raises the question of how far the in-built assumptions in QAE resonate with it. To avoid falling into the trap of according the primacy of an a priori explanatory power to QAE we use the diagnosed pitfalls as the starting point of our analysis (Table 1). In other words, we focus on the emergence and makeup of QAE, as well as on the alternative possibilities it triggered. We adopt a social-historical analytical perspective and look at the “unique situations in time and space and the cultural resources available in these situations” (Hedstöm and Wittrock 2009, 8). This involves tracing the historical path that led to the present situation.

Table 1. An overview of the conceptual approach

In subjecting QAE to scrutiny, we find that evaluation is the operational part and that quality is the notional driving force. Our focus in this article is therefore on the use of the notion of quality. We track down the breakpoint that set in motion the process through which quality emerged as a valid political term to address educational issues. Path-dependence theories are stronger as analytical devices in such tasks (e.g. Pierson 2000). They incorporate a number of basic claims, such as that sequence and timing are fundamental in explaining policies and discourses, and that important developments are frequently the outcome of earlier breakpoints resulting from particular conjunctures (e.g. Baumgartner and Jones 2009, Capano 2009). It is essential to understand educational policy in its historical context to avoid the pitfall of universalism (see Nóvoa and Yariv-Mashal 2003).

The historical view as a strategy also sheds light on the ‘socio-logic’ of the educational arena (Schriewer and Martinez 2004). We connect this idea in particular to the ‘production of legitimacy’ (Waldow 2012), which is one of the key features of QAE. We aim to enhance understanding of how interpretations of quality are built and legitimated. The terms employed to describe situations mirror the semantic resources available at a particular site (Schriewer and Harney 1999). Differences in the legitimacy of certain terms frequently represent the basis on which policies and programmes play out differently across sites (Lundahl and Waldow 2009). We aim to avoid the generalisation pitfall by focusing on legitimation. We therefore investigate the place of quality as a notion in the educational debate before and after its association with evaluation in basic-education policy, exploring changes in legitimate ways of talking, interpreting and contesting. In showing how policy formation is embedded in processes of legitimation we attest to its situatedness, thereby avoiding the pitfall.

The socio-historical approach facilitates the exploitation of political possibilities other than those prescribed in global views. Politics is a contingent activity (Palonen 2006), in which actors create possibilities by generating, (re)interpreting or dismissing political threads. It is essential in developing an understanding of how actors capitalise on existing situations, seize opportunities and create alternatives to mainstream trends to look behind the perceived convergence, and to reveal their room for action and positioning. In so doing, researchers avoid the mirroring effect in emphasising situated contingent developments instead of replicating ready-made conclusions. Hence, we shed light on a particular purposive discursive displacement occurring within the Brazilian political framework of QAE, and briefly illustrate a new political possibility it opened up.

This exploration is part of a larger research project and therefore builds upon previous and current research. Elsewhere we have given a detailed historical account of the emergence of quality assessment in Brazil and the role of expert networks and IOs in this (Kauko et al. 2016). This inquiry was backed up with a systematic literature review (1990-2014), in which we synthesised the problematisations of quality in Brazilian basic education and its relation to QAE (Candido, Kauko, and Centeno submitted). The current investigation also benefits from previous studies (e.g. Centeno 2010), as well as from our first impressions from an on-going qualitative content analysis of the changing political arena in Brazil that is based on documentary and interview data (n=21) gathered from key domestic collective and individual actors in 2015.⁶

⁶The totality of the research data was collected during 2014-2016, and it included document analysis and literature reviews, as well as interviews and observations. The semi-structured interviews (N=90) were conducted from mid-2015 to beginning-2016, on the international (n=7), national (n=23), state (n=21), municipal (n=12), school (n=27) levels. We privileged individual interviews, but at the request of the participants a few group interviews were also conducted (N=101 interviewees). We conducted interviews with representatives from the major international organisations active in Brazil, politicians and officials from government bodies at the three levels of policymaking (national, state and municipal levels) important national and state expert agencies and individuals, relevant national and state third-sector organisations, private organisations, school staff, parents and pupils. The computer-assisted (ATLAS.TI software) qualitative content analysis followed a mix of deductive (concept-driven) and inductive (data-driven) logics (Schreier 2004). For this article we use the preliminary analysis of almost all national interviews.

Quality in Brazilian Basic Education: contested, consensual and creative

Quality is a polysemous term in the Brazilian educational arena (Nardi, Schneider, and Rios 2014), its meaning varying according to the ideological and political stance of the actors (Gusmão 2010). More striking than the ambiguity of the notion is its ubiquity. Educational actors consensually perceive quality – however defined – as a legitimate semantic resource for describing or conceptualising educational matters. How did it become a constitutive notion on the Brazilian educational scene?

The next necessarily larger subsection constitutes the socio-historical contextualisation, illustrating the socio-logic and production of legitimacy in the educational arena. We chart the historically contested use of the term quality, and show how the contestation initially led to its disuse, but did not prevent its later political (mis)use. Its re-emergence in Brazil resonates with the in-built assumptions in the QAE umbrella concept.

Nevertheless, quality remained a contested notion. The following shorter subsection looks at the political breakpoint. We show how antagonist positions converged at the dawn of Brazilian democracy, and enabled the consensual use of quality in the educational arena. In some respects the makeup of the notion in Brazil challenges the in-built assumptions in QAE.

The legitimation of the notion of quality paved the way for other political possibilities in the QAE framework. In the last subsection we show how a particular purposefully discursive displacement provided civil-society actors with a renewed paradigm that made it possible to create, push forward and get their own ideas on the political agenda. In this respect the Brazilian case gives different insights than those proposed in the QAE umbrella concept, suggesting new avenues for studying QAE policies and practices.

Contested: the disuse and (mis)use of quality in Brazilian education

General concern with education in Brazil was inconsequential at the turn of the 20th century. The 1920 census indicated that 72 per cent of the population over the age of five remained illiterate (Haddad and di Pierro 2006). The oligarchies channelled policy (Schneider 1971), and education was largely under the patronage of the Catholic Church (Romanelli 2007). A reform movement in the educational arena began to criticise the insufficient number and poor quality of schools in the 1920s, calling on the government to assume responsibility for public education (Peixoto 1995). From that time on, education was strongly tied to democratization, citizenship and the national identity.

In the following decade the previously united educational community rapidly drifted into conflicting factions known as the ‘progressive educationists’ and the ‘conservators’ (Nunes 1992, Romanelli 2007).⁷ These actors shaped educational discussion and policy. They recast the initially progressive/conservative stances into secular/religious perspectives, and then narrowed them down to the public/private divide. The notion of quality became entangled in these political and ideological battles.

Disuse: democratisation and expansion – quantity at the expense of quality

In a country in which education was the privilege of the few its democratisation became ideologically and politically associated with the determined expansion of school enrolment. The progressivists discursively constructed this argument in opposition to the maintenance of school quality (conservatives) and the improvement of teaching methods (Azanha 2004, see Fonseca 2009). The ensuing secular/religious debates resonated with the progressive/conservative stances. Whereas the former supported the

⁷ In this account we also adopt these commonly accepted historical antagonistic stances for the purpose of clarification.

expansion of secular education, groups linked with the Catholic Church tried to maintain their influence, stressing the need for quality (Alvarenga 2003). Historically, these initial debates framed quality in opposition to quantity (Campos 2000).

How did this affect education policy? Brazilian governments attempted to reconcile these differences, the pendulum swinging according to their positioning. The revolutionary government (1934-1937) stressed its responsibility for education in the 1934 Constitution, but favoured the reform of secondary and higher education to the detriment of the regulation of Catholic schools and their activities (Romanelli 2007). However, the subsequent authoritarian government (1937-1945) reduced its educational responsibility to the ‘children and young people who lack[ed] the resources to pay for teaching in private educational institutions’ (Art. 129) in the 1937 Constitution.

Later on, the democratic government (1946-1951) incorporated progressive ideas, such as responsibility for national education and compulsory free primary schooling, into the 1946 Constitution, but reaffirmed that publicly funded post-primary education was only available to those who did not have the financial resources to be taught in private institutions (Art. 168). The public/private issue was the basis of thirteen years of discussion around the elaboration of the first Educational Law. The 1961 Law presented a compromise solution (Saviani 1996) between the 1948 progressive draft (Freitag 1986) and the 1957 conservative proposals (‘Lacerda’s Substitutive’).

Even if Brazil missed the opportunity to formulate a national system (Romanelli 2007), education clearly became a social imperative. The enrolment rate grew substantially even during the military dictatorship of 1964-1985 (Oliveira 2007). Economists gained a dominant position (Silva and Silva 2006), and the military governments adopted education as a strategy for social appeasement and economic

growth (Fonseca 2009). They met social demands by means of extending compulsory schooling and creating second-chance schemes, for example. Nevertheless, most effort was put into adult education with a clear bias towards indoctrination (Haddad and Di Pierro 2000) and the transformation of secondary education into vocational training.

This short historical overview highlights four significant points. First, the actors historically constructed political positioning and discursive stances through binary opposition. Second, although Brazilian education followed the respective governments' ideological stances (Fonseca 2009), political compromise always happened, either by conciliating divergent positions or by meeting social demands for education (Saviani 1996). Third, despite the rapidly swinging political pendulum, the democratisation of education took shape in the concrete expansion of educational opportunities (Oliveira and Araujo 2005, Klein 2006, Oliveira 2007, Gouveia and Souza 2013). Fourth, in the course of this process, quantity and quality epitomised two antagonistic stances, and the Brazilian educational path has favoured, discursively as well as pragmatically, the former to the detriment of the latter (Campos 2000, Azanha 2004). This is arguably behind the general disuse of the notion of quality in the educational arena until the end of the military dictatorship.

(Mis)Use: educational management and assessment – quality back to the fore

A strong democratic movement progressively took hold in the 1980s, mainly stimulated by workers' strikes and walkouts. The strikers included numerous professors and teachers from all over the country (Alexander 2003). As a result, progressive ideas and proposals were brought into the political arena (Gouveia and Ferraz 2013).

Nonetheless, the notion of quality re-surfaced in the educational arena chiefly through the application of Total Quality Management (TQM) to both public administration and educational management. Although there were alerts coming from

the educational community about the need to improve quality (Beisiegel 1975),⁸ it was essentially the perceived misuse of quality in TQM that re-fuelled the discussion.

Concomitantly, the first experiments were carried out on the use of assessment as a tool for educational planning.

After the dictatorship, Brazil was faced with economic adjustment (Wirth 1997), growing financial demands in the field of education (Campos and Haddad 2006), and calls from IOs for structural reforms. Governments adopted two strategies: the incorporation of TQM into educational programmes and the development of assessment tools.

TQM was widely disseminated throughout the industry and business sector in the 1980s as a powerful strategy to improve the production of quality goods and services (Longo 1996). In the international sphere, educational institutions began to adopt TQM in the 1990s for the purpose of administration and curriculum development (Winn and Green 1998). Apparently, Brazil was an early adopter in the global dissemination of managerial quality control as applied to education. However, in contrast to other early-adoption processes (Steiner-Khamsi and Ines 2006, 9-10), this one appeared to have been unsystematic and inconsequential. The Sarney Government (1985-90) designed a programme called The School of Total Quality. Gentili (1994) explains that the goal was to implement TQM in schools by fostering a unique transformative process in each one in order to improve Brazilian education as a whole: the school community (pupils, teachers, school staff, parents and others) and society were to cooperate in defining a 'pact for quality'. With the exception of Gentili's study,

⁸ Beisiegel was one of the few scholars writing about quality in the 1970s. The educational community came back to his ideas and texts in the 2000s (e.g. Gusmão 2010, Cabral and Di Giorgi 2002, Oliveira and Araujo 2005). Beisiegel re-published his 1975 article, together with others, in a 2006 compendium, noting that the ideas were still very relevant.

it is difficult to find accounts detailing the impact of this programme, which arguably reflects its lack of impact on Brazilian educational planning as a whole.

Conversely, TQM had a strong impact on education-related discussions. Not only did it re-introduce the notion of quality into the debate, it also gave it a certain political legitimacy. The concept of total quality attracted a great deal of attention from all sectors. Policymakers, economists and sociologists identified parallels between the need for economic and educational restructuring, and saw TQM as a solution for the country's managerial problems (Longo 1996). Numerous publications reflected this interest, focusing on the relationship between education and work, and the effects of the total quality approach on education (Ricardo Filho 2010). Whereas economists and sociologists embraced TQM, educators strongly criticised it as a neo-liberal approach to education (Gentili and Silva 1994). Total quality became a fashionable and shared goal, which even engaged those who were against it (Enguita in Rodrigues 1995): it brought quality back to the fore.

Educational planning emerged as a fundamental issue in Brazil in the 1970s, i.e. before the introduction of TQM. Mass schooling raised concerns on the administrative level about issues ranging from the appropriateness of school materials to teacher training and curriculum organisation (Gatti 1987). Later on, the growing incidence of school dropout and retention rates became the main problems (Nardi, Schneider, and Rios 2014). Instead of introducing substantial reforms (Franco et al. 2007), states attempted to increase student flow by means of palliative measures such as automatic grade progression, the provision of acceleration classes, and the reorganisation of studies into cycles. These policies impaired the traditional indicators (Oliveira and Araujo 2005), leading state and municipal education secretaries to develop performance tests in the late 1970s as alternative ways of gathering information (Gatti 1987). Some

states received funding from the World Bank (IBRD/WB) for these programmes (e.g. EDURURAL), which influenced their formulation (Gatti, Vianna, and Davis 1991).

On the national level, the government started to develop pupil assessment in the framework of a loan agreement with the WB (1981-87) during the dictatorship (Kauko et al. 2016). The Sarney government (1987) began to design large-scale evaluations to provide information to state secretaries about learning difficulties (Gatti, Vianna, and Davis 1991, Horta Neto 2007). This led to the planning of the first nationwide Evaluation System of Public Education (SAEP).⁹ Despite the postponement of its national launch for financial reasons (Horta Neto 2007), SAEP prepared the ground for the ‘first-generation assessment of basic education in Brazil’ (Bonamino and Sousa 2012) that took place in the 1990s. These first initiatives facilitated later QAE practices (Kauko et al. 2016). The subsequent governments travelled down a path already trodden (Freitas 2004).

This confirms the in-built assumptions of the QAE umbrella concept in terms of its emergence. Although set against a contrasting social-historical backdrop and with a dissimilar stock of legitimate semantic resources, by and large, QAE surfaced in Brazil as it did in European countries in terms of public-sector managerial reforms, in connection with IOs, and in the light of a renewed educational discourse in which education quality became progressively associated with evaluation. The differences concerned situated specificities that do not call into question the relationships stressed in the umbrella concept.

⁹ It is interesting that Brazil was an early adopter not only of the application of managerial practices to education (TQM), but also of the institutionalisation of systematic performance-assessment schemes. This could be attributable to the long historical involvement of IOs in Brazilian education (see Centeno 2010; Kauko et al. 2016).

Consensual: the 1988 Constitution and the legitimation of the notion of quality

The political appropriation of TQM and the further implementation of assessment tools triggered major debates and forced a repositioning in the educational arena. The educational community criticised both TQM and the assessment of neo-liberal practices embedded in the mercantilist vision (Gadotti 2013) for compromising the equality of educational opportunities and the democratisation of schooling (Campos and Haddad 2006). Again, the actors recast the notion of quality into two positions perceived as antagonistic.

How did the passage from a contested to a consensual use of quality in describing educational problems happen? As path-dependency theories explain, situations are frequently more sensitive to earlier than to on-going developments. The event that made possible the legitimation and use of the notion of quality in fact took place at the height of the criticism: the 1988 Constitution. It materialised at the intersection of the democratisation and expansion of education with the managerial approach to quality and assessment.

The 1988 Constitution mentions quality, as related to education, four times (Gusmão 2010). The first three times it appears in the form of a social right, related to the democratisation and expansion of education: twice with reference to the assurance of minimum patterns of quality in education and the third time connected with improvement in quality. In all three cases the right to quality education for all is expressed in terms of social justice and human rights (Freitas 2008).

The 1988 Constitution established a precedent for the consensual use of quality as a legitimate notion through which to address educational concerns: it recast quality within social argumentation. The Constitution was a milestone in Brazilian democracy: it was the outcome of a social-democratic movement and it was the first constitutional

document to set out a list of social rights, of which education came first (Oliveira 2007). It also established a new political definition and social understanding of education, as a principle and a right (Cabral and Di Giorgi 2002). Later, this reframing made possible the discursive re-appropriation of the notion of quality into a legitimate argumentative framework (see the next section). Thus, in contrast to the in-built assumptions in the QAE umbrella concept, the Brazilian notion of education quality entered the legislation in the context of social practices. The legal framework took on social characteristics and terminology.

The fourth reference in the Constitution reflects Catholic as well as private-sector interests (Camargo in Gusmão 2010, 51). The same historical logic of compromise is followed in the framing of the overall text in a progressive tone, while safeguarding existing interests. The Constitution acknowledges the existence of private-education institutions, but seeks conciliation, regulating their functioning by putting public bodies in charge of evaluating and assuring their quality. As Freitas (2004) mentions, QAE practices emerge from the logical implementation of this disposition. How can the quality of private education be evaluated if that of public education is not evaluated? Against what standards should public bodies evaluate private education? How can the educational situations of more than 220.000 schools operating within 26 states, the federal district and over 5.000 municipal systems be evaluated without engaging in large-scale assessment? The 1988 Constitution provided the political rationale and legitimation for the development of such assessment. An apparent small detail clearly illustrates this. In 1990, the government implemented the previously planned Evaluation System of Public Education (SAEP). However, to comply with the directives of the 1988 Constitution, the name was changed to the Evaluation System of Basic Education (SAEB, Horta Neto 2007). In line with the in-built assumptions of the

QAE umbrella concept, quality in education was operationalized through performance assessment, legitimated in an accountability framework.

The 1988 Constitution simultaneously cleared the way for QAE policies and the legitimation of the notion of quality, redefined as a socio-educational political project. This re-definition prepared the ground for a creative deviation: ‘social quality’ emerged from ‘total quality’.

Creative: ‘social quality’ and new political possibilities

The ground was laid for the rapid development of QAE practices in the late 1980s. This political development pushed the educational community into creating new interpretations and new opportunities. Perhaps the most sui-generis of these was the discursive displacement from total to social quality.

The effects of the 1988 Constitution on the educational discourse only came to light later when the actors purposively recast the notion of quality within the paradigm of social rights, thereby legitimating its re-appropriation. The Brazilian literature charts this development. Scholars began to depict the history of schooling through the prism of quality (Oliveira and Araujo 2005).¹⁰ On the one hand, this historicisation shows how quality became a legitimate semantic resource for tackling educational challenges: depicting the evolution of a notion implies accepting its relevance. On the other hand, the renewed meta-narrative again reflects how the ‘production of legitimacy’ (Waldow

¹⁰ In their view, the historical problems reflect how the educational community understood education quality over time. For instance, the problems of school access in the 1940s and of school dropouts in the 1980s indicate that education quality meant, respectively, the expansion of school access and the regularization of student flow in those historical periods. Policymakers and civil-society actors (interview data) also embrace this renewed meta-narrative.

2012) took place in the Brazilian educational arena. The rationale used later for banning the notion of quality was behind its re-appropriation. In Brazil, the rationale underpinning educational thinking is only legitimate if it is socially grounded.

Yet, a re-interpretation of the history of schooling as reflecting a constant quest for quality clearly hints at a quest for legitimacy. If we keep maintaining the simplistic dichotomy for the sake of clarity, it could be said that the arena was turned around: the same movement that constantly contested the use and misuse of quality in the past started advocating it. This re-positioning allowed the construction of a new paradigm: social quality.

What is social quality? Although the Ministry of Education (e.g. 2006) sometimes uses this notion, scholars, educators and civil society are the main drivers of its framing and usage. Initially framed explicitly in opposition to total quality (Campos and Haddad 2006, Gadotti 2013), it was rapidly appropriated as a counter-project of QAE policies (Azevedo 2007). The educational community perceives social quality as the democratic battle for inclusive and emancipatory education (Azevedo 2007). It projects a new vision of quality (Gadotti 2013) as a democratic condition (Dourado 2007) and a social right (Dourado n.d.), thereby representing a new parameter of the educational process (Dourado 2007, Cabral and Di Giorgi 2002). Examples of projects drawing on the notion of social quality are as comprehensive as its formulation. They include participatory processes in educational planning (Escola Cidadã/Citizen School, Azevedo 2007), new educational infrastructures in urban centres (CEUs, Padilha and Silva 2004) and the elaboration of municipal educational policies aimed at the emancipation of the popular classes (Flach 2005). As Bernhard Charlot states: social quality is ‘typically Brazilian!’ (Charlot in Gusmao 2010).

Social quality implies purposeful discursive displacement in order to put other issues on the political agenda. Actors have been addressing long-term problems within the discursive frame of the ‘assurance of minimum patterns of quality’ set in the 1988 Constitution. These issues cover a variety of matters ranging from the teacher’s career to social demands (Ramos 2014). Social quality mirrors the renewed semantic appropriation of quality, and this is creating new political possibilities.

The political success of including the Cost of Initial Quality Education per Student (CAQi),¹¹ a civil society’s ‘proposal for the financing of public quality education for all’ (Campanha 2010), in recent educational legislation, is an example of the new political possibilities the notion of social quality opens up. CAQi is an alternative method of calculating the educational budget that ‘determines how much should be invested per student, per year to ensure a minimum standard of quality education’ (Campanha 2010, 6). It is legally and discursively grounded in the 1988 Constitution’s ‘human right to quality public education’ and its unfolding in later legislation (Campanha 2011, 9). It is anchored in the concept of ‘social quality’ and represents the concrete implementation of quality education (interview data). As a benchmark for the financing of public education, CAQi entails substantial augmentation of the Brazilian budget for education (Campanha 2010, 2011).

The most prominent social movement in Brazil, the Campanha Nacional pelo Direito à Educação (Campanha: the Brazilian Campaign for the Right to Education),¹²

11 For the purposes of this paper we focus only on CAQi, despite the existence of CAQ and other pupil-cost instruments. See the proposal website for a brief clarification of the differences between the two mechanisms, <http://www.custoalunoqualidade.org.br>.

12 The Campanha (Brazilian Campaign for the Right to Education, official translation, see Campanha 2010) was born in a small room in the headquarters of another civil-society actor, the Ação Educativa (interview data), the aim being to gather ‘different political

heralded the elaboration of CAQi in 2002, which within a couple of years became the flagship of the larger movement towards improving educational quality. Despite the criticism of this type of instrument, its technical features and efficacy (e.g. Oliveira and Araujo 2005), the Campanha seems justified in announcing CAQi as the result of a broad consensus built upon multiple ‘alliances and partnerships’, ‘public policy advocacy’ and ‘social mobilization’ (Campanha 2010, 49). After years of all-inclusive national workshops and studies, the Campanha signed a cooperation agreement with the Federal Education Council (CNE) in 2008. For the first time the CNE established a partnership with a civil-society movement (Campanha 2010). Two years later, the CNE endorsed the establishment of minimum patterns of basic-education quality in accordance with CAQi (Brasil 2010b). CAQi was debated, approved and further elaborated in major National Conferences of Education (CONEB 2008, CONAE 2010, 2014). Although it had only a marginal place in the first draft proposal of the National Education Plan 2011-2020 (Brasil 2010a), a year later an amendment brought it into the official framework (Brasil 2011). The current PNE 2014-2024 refers CAQi as a strategy to increase the public investments in public education (Brasil 2014).

Very recently, on 5 May 2016, the Ministry of Education established the National Evaluation System of Basic Education (SINAEB), the Board of which included Campanha representatives (Brasil 2016). The aim was to replace SAEB and use CAQi as one of the main education indicators (Brasil/MEC 2016). The Campanha

forces, to prioritize mobilization actions, political pressure and communication’ (<http://www.campanhaeducacao.org.br>). Created in 1999, it is now a ‘plural network of more than 200 teachers unions, social movements and civil society organizations that aim to grant every citizen its right to a quality public education’ (Campanha 2010, 4).

successfully put the CAQi on the Brazilian political agenda.¹³ This case is an illustration of a how actors seize opportunities and create unforeseen political possibilities in the framework of QAE practices.

A remark ought to be made. After the submission of this article, important events took place in Brazil. In the aftermath of a rapid and controversial change of government, a new administration took over (12 May 2016) and the SINAEB decree was repealed (25 August 2016). The educational community contested this political act severely, as well as other on-going political changes in education. While revising this article, we ask ourselves how to make sense of our findings. The current political situation did not originate in the education field, but rather steam from an encompassing political juncture. It is still too soon to assess any actual change in education. The Brazilian political situation is far from being settled and therefore of being resolved. A look at the Brazilian education history shows us that actors' coalitions and constellations change constantly according to political agendas. More often than not, these actors have an impact on the political agenda. Furthermore, this meets the premises of our theoretical framework: policy is a contingent activity.

Conclusion: a focus on deviation rather than conformity

As contingently created knowledge, umbrella concepts are susceptible to pitfalls such as implicit universalism, speculative generalisation and mirroring. However, as

¹³ Interview data shows that Campanha was in fact closely involved in the elaboration of the SINAEB. As an interviewee states: "...[For the] Campanha... the bigger movement...[it has] taken [it] a long time to construct that vision of the SINAEB... the National Evaluation System of Basic Education, that was a painful process [for the Campanha]...with a big effort..." (BR-NNGO).

comprehensive analytical tools they also have the potential to foster explanations. This article has shown that awareness of the nature of the pitfalls could turn them into analytical strengths. The analyses illustrate how the identification and probing of the in-built assumptions of umbrella concepts makes it possible to trace relationships and to open up new avenues for research.

Do the in-built assumptions in QAE resonate with Brazilian developments? We have identified two clusters of relationships. The first of them concerns matching relationships. Borrowing Carney's expression, we name this cluster 'global interconnectivity' (2009). It reveals the impact of international networks and organisations, and of the construction of global visions and policies. It shows how educational discourse interconnects contrasting sites. Despite the contrasting political frameworks and socio-historical backdrops, the different purposes, timing and actors, QAE emerged, was legitimated and operationalized analogously in Brazil and Europe.

Assumptions related to the emergence of QAE seem perfectly appropriate in explaining the development of QAE in Brazil, as do some of the assumptions about its makeup. The Brazilian specificities, namely timing and the actors involved, do not challenge the relationships established between the emergence of QAE, the launch of public-sector managerial reforms and IOs activities, together with the emergence of educational discourses in which educational quality became associated with evaluation. In the same vein, the relationships between the formulation of quality-in-education policies and the operationalization of performance assessments on the one hand, and the construction of a legitimacy frame based on accountability on the other, go hand-in-hand with some of the assumptions concerning the constitution of QAE.

In fact, our exploration shows that the pitfalls connected with the uncritical use of umbrella concepts relate to the understanding of meanings, interpretations and

possibilities. In this case it seems that implicit universalism would not have been a pitfall in our research, given that global interconnectivity facilitates the universal emergence and dissemination of ideas and practices. However, it would have been a pitfall if we had taken that emergence as a sign of conformity and had prematurely interpreted Brazilian developments in the light of European developments. This would have rebounded on the pitfall of speculative generalisation, insofar as we would have understood the parallels as plain similarities and ignored their actual meaning, which in turn would have encouraged us to mirror the possibilities stated in the QAE literature and to overlook the deviations.

The risks in the use of umbrella concepts seem to come down to the reproduction of understandings. The Brazilian developments challenge some of the in-built assumptions in QAE referring to its makeup and the political possibilities it might trigger. Although educational quality (re)emerged within the framework of managerial reforms, its first political articulation was in the realm of social rights. Even if the terms used to address quality-in-education are similar to the English QAE terminology (e.g. the assurance of minimum quality standards), they reflect a social-related discourse engaged in ensuring education rights to all Brazilians.

Therefore, even though QAE practices might be indiscriminately denominated as managerial, quality assurance in Brazil also has a social character in that it relates to the enactment of social rights. Therefore, we cannot say that the political terminology simply adopts the managerial terminology, as prescribed in the QAE umbrella concept. The discursive alternatives created within the QAE framework clearly reveal how the Brazilian discourse is strongly couched in socially related terminology. The best illustration of this is the renewed paradigm of ‘social quality’ that opposes the established mainstream framework. It is a purposive discursive deviation from

managerial and assessment policies, which shows how actors are able to act within and around the QAE discursive frame, creating new possibilities that influence government practices. A political outcome of this paradigm is a new indicator for education funding elaborated by a social movement. Its inclusion in the education legislation and programmes (e.g. the PNE 2014-2024) shows how unforeseen alternatives may take root in the realm of QAE. In this vein, the substantiated in-built assumption that international QAE is filtered according to the traditions of individual countries gains in significance.

We refer to this second cluster of non-matching relationships as contextual creativity. It conveys an old and well-known idea in the field of CE: contextualisation is imperative in the understanding of educational developments. At the same time, it hints at a new research direction in which the focus is on deviation rather than conformity. The QAE framework brings new actors into the arena, triggering new power formations. An example of this is the emergence of a strong civil society in the Brazilian educational arena, whose activity is affecting the political agenda. This repositioning is on the move and the consequences are far from predictable. The analysis indicates that, although QAE policies and practices are pervasive in education, there is still much room for creative deviation (Badie 1992) and manoeuvre. The apparent policy convergence is anything but policy closure (Carney and Bistra 2009).

We began this exploration with a plain question and challenging reflections. We end it with a plain answer and challenging observations. Yes, it is valid to use QAE to make sense of educational developments taking place in contrasting sites, such as Brazil and Europe. However, our exploration implies that more research into umbrella concepts is needed before they are uncritically taken into use, given that it might uncover deviation behind the conformity. We exemplified this by investigating whether

QAE resonated with Brazilian developments, instead of identifying practices and policies that matched it. In other words, instead of seeing Brazilian basic education through QAE lenses, we analysed the umbrella QAE concept through Brazilian lenses.

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