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# Externalisations in the Portuguese parliament: analysing power struggles and (de-)legitimation with Multiple Streams Approach

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## ABSTRACT

International organisations' importance in education policy has been growing in recent years. They have been able to promote their role by providing data and interpreting it through international assessments and guidance, and by highlighting some countries or regions as benchmarks for global improvement, performance, and efficiency. International organisations' output feeds policy reform arguments in national and regional contexts. We analyse debates on education policy in the Portuguese parliament with the aim of understanding the roles of external references to international organisations, their instruments, and associated countries. We understand the agenda-setting process through political, problem, and policy streams as described by the Multiple Streams Approach. Our analysis shows that external references play a key role in the three streams as extra sources of authority used by policymakers in the attempt to open new policy windows and couple the three streams, resulting in policy change.

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Externalisation; external references; reference societies; multiple streams approach; parliament; Portugal

## Introduction

The European Union (EU) and the Organization for Economic Cooperation and Development (OECD) have increasingly fed and supported discourses in favour of and opposed to policy reforms in national and regional contexts in the last fifty years. While these organisations only indirectly influence education legislation, they are increasingly influential through data production, and comparative and guidance instruments. The use of the Open Method of Coordination has strengthened the EU's and European Commission's role in the intergovernmental Bologna Process, which aims to harmonise European education also outside the EU (Krejsler, Olsson, and Petersson 2014). The OECD has developed international large-scale learning assessments (ILSAs) like PISA (Programme of International Student Assessment), now widely acknowledged by education policymakers. Using such instruments, these organisations highlight the practices and policies of 'high-performing' countries or regions. These have become benchmarks for countries seeking to improve their policies' effectiveness (e.g. Grek 2009; Bulle 2011; Carvalho 2009, 2012; Carvalho and Costa 2014a).

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In this article we examine references to international organisations, their instruments, and the countries or regions described as successful, aiming to understand the roles these external references play in the agenda-setting process in the Portuguese parliament. Our study focuses on the externalisations to world situations<sup>1</sup> (Schriewer 1990) occurring in the context of the Portuguese parliament's debates on education. Jürgen Schriewer (1990) identifies the reference to world situations as a commonly used form of externalisation. He defines it as the act of opening the system to what lies beyond its borders, arguing that there is a 'socio-logic', based on cultural values or societal conditions and events, that leads to the use of certain world situations as an authority tool for (de-)legitimation of policy ideas struggling to find a consensus (Schriewer 1990; Steiner-Khamsi 2003; Waldow 2012).

The study focuses on Portugal, where research on the use of external references in the specific context of the Portuguese parliament's plenary debates on education remains non-existent. A limited number of studies on the discursive uses of external inputs in the country's education debates exist. They mainly study the influences and uses of PISA (e.g. Afonso and Costa 2009; Costa 2011; Lemos and Serrão 2015; Carvalho, Costa, and Gonçalves 2017) or the OECD (e.g. Lemos 2014; Teodoro 2019).

Research repeatedly describes PISA influencing policymaking in several national and regional arenas (e.g. Afonso and Costa 2009; Carvalho and Costa 2009, 2014b; Breakspear 2012; Morgan 2015; Niemann, Martens, and Teltemann 2017; Morgan and Ibrahim 2019) and its impact on the (re)construction of the reference societies<sup>2</sup> used as a tool to strengthen arguments (de-)legitimising policy change (e.g. Takayama 2009; Sellar and Lingard 2013; Carvalho and Costa 2014a; Takayama, Waldow, and Sung 2013; Rook and Espeña 2018; Waldow and Steiner-Khamsi 2019). However, the results also indicate that PISA does not significantly influence the target (Sung and Lee 2017) or number (Rautalin, Alasuutari, and Vento 2018) of reference societies used in national policy debates. Recent research argues that it is the combination of PISA results, long-standing relationships, and historically constructed images of the top scorers that makes a country or region a positive or negative reference society (e.g. Waldow, Takayama, and Sung 2014; Waldow 2017; Takayama 2018; Waldow and Steiner-Khamsi 2019).

Because much of the international and Portuguese research on external references has focused on PISA,<sup>3</sup> PISA's low impact in Portugal during the survey's first two cycles is interesting. Following Martens and Niemann (2013, 314) reflection on the impact of ILSAs on national contexts, strong public policy debates emerge when perceiving education as an important topic is combined with a large gap between the country's expectations and the ILSA's actual results. It has long been accepted in Portugal that its education system is poor in European comparison (e.g. Gomes 1999; Nóvoa 2005; Lemos 2015; Mendes 2015). Poor PISA results therefore caused no national 'scandalisation' (Steiner-Khamsi 2003). We analyse the full spectrum of external references and broaden the perspective beyond PISA.

It is important to analyse the external elements used, and why and how they are used in the Portuguese parliamentary discussions on education. We join others in arguing that to understand the policymaking process and the uses of external references within this process, the local context in which this process occurs must be understood (e.g. Schriewer 1990; Steiner-Khamsi 2004). Our premise is that to understand the logic of national policymaking, we must draw on both comparative education and policy process theories.

We utilise the analytical lenses of the multiple streams approach (MSA) to policymaking (Kingdon 2003), which allows an analysis of the dynamic process of policymaking and reveals how external references are used during political struggles. The basic idea of the MSA is the individual analysis of the problem, policy, and political streams, and an understanding of how their combination opens policy windows and enables change.

## Data and methods

The study's data comprises parliamentary debates between December 2001 and December 2018 (Legislatures IX to XIII<sup>4</sup>), the period between the release of the first PISA results and the first data collection. The data includes all 81 general or specific education debates, and 34 debates on education-related bills (first reading and discussion of reform proposals) in a total of 115 debates, all occurring in plenary session and selected for their extensive discussion of education. The first education debate during the period occurred in June 2002. The data was collected from the Diários da Assembleia da República (DAR)<sup>5</sup> online (<https://www.parlamento.pt/>) using a keyword search,<sup>6</sup> which identified more than 150 debates on education topics, some of which were listed but unavailable online.

The parliamentary Rules of Procedure identify nine main debate types, described in Appendix 1. They differ in who requests them (e.g. ministers or deputies), their urgency, function (e.g. general discussion or debate on concrete bills), and more importantly, whether they demand the attendance of a government representative. Interestingly, education was not extensively discussed in any debates on the state of the nation. Alongside the debate types, we created a category of 'other debates'. Apart from the state of the nation and thematic debates, education featured relatively evenly in all types (see Appendix 1).

The study focuses on the plenary sessions, because they are the primary public mode of communication between deputies and their electorate (Ilie 2017; Paulo and Cunha 2013; Marcinkiewicz and Stegmaier 2019). Deputies deliberately seek to convince policy actors and citizens in general of the relevance of their ideas and proposals, or the insignificance of opponents', thus propelling their agenda. The plenary is therefore an arena in which policy actors perform to a national audience. Marcinkiewicz and Stegmaier (2019) and Green-Pedersen (2010) identify different strategies the deputies and their parties use in public debates to attract attention: party competition; claiming and disclaiming credit; and position taking and questioning to raise favourite issues and solutions and hold the government accountable. In developing our analysis, we consider these elements and the idea that the plenary session constitutes a major performance stage for deputies and parties.

A combination of qualitative and quantitative methods was used. First, we conducted a qualitative content analysis (Schreier 2014) with the support of the Atlas.ti8 software, developing an inductive and deductive coding system. Deductively, we created eight main categories crucial for answering the research questions, such as 'function of the reference'. These were complemented by sub-categories inductively interpreted by reading the debates. The result was a coding system that informed us, for example, of whether a reference's function was legitimisation or de-legitimisation. We then used the coding to form descriptive statistics (frequency, percentage) to understand who the main speakers

were, the main external references used, and how they were used. Data analysis was organised by Legislature.

### **The analysis of the policy process as a river with multiple streams**

The policy process is often seen as chaotic, involving different actors at various levels of governance with multiple interests and frequently opposing aims, interacting both cooperatively and competitively (Sabatier 2007; Cairney, Heikkila, and Wood 2019). Since the 1980's a growing number of approaches has analysed policymaking and governance processes through lenses considering them complicated and non-linear: polycentric governance; punctuated equilibrium theory; the advocacy coalition framework; complexity theory; and the multiple streams approach – to name only some (Cairney, Heikkila, and Wood 2019).

We understand politics as the process of reorganising contingency: an attempt to grasp complexity (Kauko 2014; see Edwards 2010). The policymaking process itself is complex and dynamic, and we apply the multiple streams approach (MSA), which adopts this premise, to analyse how policy problems emerge in the Portuguese parliament policies' formulation, and the role references to world situations play.

In the 1980's John Kingdon and his research group developed the MSA to understand US federal policymaking. It understands the policymaking process as involving actors in different governance and policy communities. Policymakers, inserted in contexts characterised as organised anarchies (following Cohen, March, and Olsen 1972), are described as possessing a bounded rational ability: they can only attend to a limited number of issues, face high levels of ambiguity and uncertainty, and have tight time constraints, unclear work processes, and frequent changes in participants. This leads to problematic policy preferences (Zahariadis 2007; Jones et al. 2016; Herweg, Zahariadis, and Zohlnhöfer 2018).

The MSA presents the policy process as involving five key elements, three independent streams (politics, problems, and policies), policy windows, and policy entrepreneurs. The political stream concerns the policy process's context (Kingdon 2003). The problem stream relates to issues emerging from a situation perceived as a problem. The policy stream consists of the different solutions advocated by the various policy actors and thrown into the 'policy primeval soup' (Kingdon 2003).

Policy windows are moments when different policy advocates are more likely to succeed in gaining attention for their proposals. They are rare, remain open briefly, and can be very predictable (e.g. the approval of government programmes) or unexpected (e.g. a natural disaster) (Zahariadis 2007, 73–74). As policymakers are constantly bombarded with problems of which they can attend only to a few, policy entrepreneurs identify policy windows and attempt to combine the three streams by strategically and convincingly presenting their pet solutions to busy policymakers and earning their support (Zahariadis 2007, 74; Herweg, Zahariadis, and Zohlnhöfer 2018, 28–29).

The MSA has been expanded and adapted to allow its use in stages of the policy process besides agenda setting in contexts other than the federal level in presidential systems, and for a comparison among countries or regions (Jones et al. 2016; Zahariadis 2007; Herweg, Zahariadis, and Zohlnhöfer 2018). For example, Novotný and Polášek (2016) use the MSA to analyse change within political parties; and Herweg, Zahariadis,

and Zohlnhöfer (2018) suggest the MSA is suitable for studying parliamentary systems. To enable this analysis Herweg, Huß, and Zohlnhöfer (2015) propose adaptations to the original approach to include the role of political parties, noting that different party members incorporate complementary roles in different streams. Whereas party experts belong to policy communities, identify problems, and advocate alternative policy proposals in the problem and policy streams, the party leader works on ‘adopting policies in the political stream’ while ‘taking into account the national mood and the constellation of organized interests when supporting (or not) a proposal’ (Herweg, Huß, and Zohlnhöfer 2015, 436). This broadened use of the MSA suits our analysis. The Portuguese political system is characterised by strong party discipline and cohesion (Leston-Bandeira 2004). The policy agenda is planned within parties, and issues are framed as problematic and opportunely raised by party leaderships in parliamentary debates, accompanied by policy proposals. We consider the implications of this in the conclusion.

### ***The political stream: the context that matters***

Kingdon (2003, 145–163) describes the political stream as a broader setting for promoting or inhibiting the agenda. It is the context in which the policymaking process occurs. Four main factors affect the political stream: national mood (institutional and public opinion); organised political forces (the balance between support of and opposition to a policy by different interest and political groups); government (changes in the government itself); and consensus building (coalitions built by concession and bargaining). All these factors are involved in Portugal’s political stream. However, we limit our analysis of the government as a political organ functioning under parliament’s scrutiny, instead of as an administrative constellation.

The political stream’s character is embedded in history. Portugal had an authoritarian regime for 48 years until April 1974 but retained external relations with other countries and international organisations despite its hard borders and closed ideology (Barreto 2002; Moreira et al. 2010). For example, Portugal was a founder member of the OECD in 1948 (MNE, in <https://www.ocde.missaoportugal.mne.pt>). This strongly influenced its economic and education policies (Gomes 1999; Barreto 2002; Teixeira, Amaral, and Rosa 2003). The first stable four-year government (1976–1980) also saw the accession to the EU as essential for the establishment of Portuguese democracy. Having applied in March 1977, the country joined as a EU member state in 1986 (Mateus 1999; Fraga 2001).

Under its 1976 constitution Portugal adopted a semi-presidential political system, with power divided between the president of the Republic, parliament, and government. The unicameral parliament has strong legislative power, holds the government to account, and has the power to dismiss it through censure or confidence motions (Leston-Bandeira 2004; Freire 2005; Goes and Leston-Bandeira 2019). The 230 deputies are elected by electoral districts, using the d’Hondt method.

The political and electoral culture results in a multiparty system and usually in majority coalition governments. However, Portuguese governments can also function on a minority basis.<sup>7</sup> The complications to the policymaking process that arise from minority governments and the parties’ central parliamentary role mean that party leaders usually form coalitions with other parties politically close to their own. The parties select

electoral candidates internally and form parliamentary groups (Leston-Bandeira 2004; Lobo, Pinto, and Magalhães 2015). At the time of writing there were seven parties in parliament (Table 1).

**Table 1.** Main political parties in Portugal, organised by number of seats in parliament (Leg. XIII).

Party	Political spectrum
PS (Partido Socialista – Socialist Party)	Centre-left
PSD (Partido Social Democrata – Social Democrat Party)	Centre-right
BE (Bloco de Esquerda – Left Block)	Left
CDS-PP (Centro democrático Social-Partido Popular – Social Democrat Centre-Popular Party)	Right
PCP (Partido Comunista Português – Portuguese Communist Party)	Left
PEV (Partido Ecologista ‘Os Verdes’ – Ecologist Party ‘The Greens’)	Left
PAN (Pessoas-Animais-Natureza – People-Animals-Environment)	Centre-left

Externalisation to world situations is frequent in Portuguese parliamentary education debates. Of the 115 analysed debates, only 18 (16%) contained no external reference. In the other 97 there were 830 quotations with external references. Quotations often have more than one external reference. A total of 173 different targets was identified (Table 2).

**Table 2.** Different external references identified.

External references	Frequency
<b>Reference societies</b>	<b>63 (36%)</b>
<i>Countries (mostly European countries)</i>	45
<i>Regions (e.g. EU countries)</i>	9
<i>General references (e.g. several countries)</i>	9
<b>Reference to international actors and instruments</b>	<b>99 (58%)</b>
<i>Collective or individual international actors (e.g. EU)</i>	55
<i>Instruments (e.g. PISA, Bologna Declaration)</i>	44
<b>Reference to international events</b>	<b>11 (6%)</b>
<b>TOTAL</b>	<b>173 (100%)</b>

References most commonly concern actors other than countries. Of the 173 targets of externalisation identified, 36% were reference societies, of which most were to specific countries ( $n = 45$ ), nine to regions, and nine to unidentified groups of countries. However, these references to individual countries represented a minority in the total of quotations with references. Of the 830 quotations with external references, 434 have reference societies. Of these, 84% include regions or unnamed groups of countries (e.g. ‘European countries’ or ‘developed countries’), and only 26% specific countries (mostly European). Indeed, individual countries are rarely referenced in Portuguese parliamentary education debates. They are scattered among many different countries, and it is rare that any are among the five most used external references apart from Spain, to which there were seven references during Legislature XI (Table 4).

However, most external references concern international actors (collective or individual) and instruments, constituting 57% of the 173 targets of externalisation. Slightly more than half (n = 55) were international actors (mostly organisations like the EU or OECD; sporadically, individuals like Nicholas Barr or Tibor Navracsics), and 43 were instruments (e.g. Bologna Declaration or PISA). Of the 830 quotations with external references, 566 have references to international actors or tools. Of these, 59% referred to international actors, and 58% to instruments. The remaining 11 of the 173 identified references (6%) were to international events (e.g. conferences).

The data reveals references were generally positive (76%) and used for legitimisation (61%) (Figures 1 and 2).

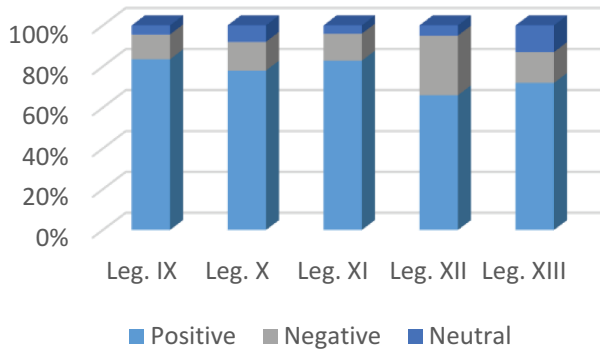


Figure 1. Tone of the external references in each Legislature.

The positive tone of external references in the Portuguese parliament (Figure 1) can be analysed following Kingdon (2003) as indicative of a national mood, allowing policymakers leeway to use external institutions, instruments, and other countries and regions as sources of authority to support their arguments. However, the relatively high amount of external referencing used for de-legitimation (Figure 2) prompts an examination of why externalisation often seems connected with conflict between organised political forces: external references are used to attain a balance between support of and opposition to proposals. The support one’s own argument can receive and the extent to which opposition or government arguments and actions can be discredited are equally important.

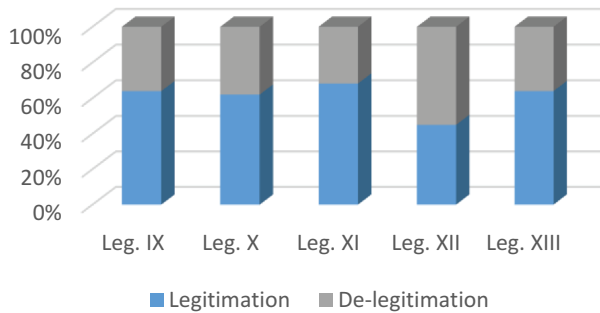


Figure 2. Functions of the external references in each Legislature.



Parliamentary dynamics further explain this de-legitimising use of references. The left-wing parties (PCP, BE, PEV) frequently oppose the government's proposals, and they regularly use external references to de-legitimise others (Table 3), illustrating the difficulty of consensus building among the various organised forces.

**Table 3.** Functions of the external references used by each party.

Speaker	Function	
	<i>Legitimation</i>	<i>De-legitimation</i>
<i>PSD-CDS governments</i>	45	3
<i>PS governments</i>	169	12
<i>PS deputies</i>	93	67
<i>PSD deputies</i>	71	57
<i>CDS-PP deputies</i>	44	39
<i>PCP deputies</i>	13	72
<i>BE deputies</i>	35	64
<i>PEV deputies</i>	16	23
<i>PAN deputies</i>	2	0
<i>Luisa Mesquita (no party, previously PCP)</i>	1	2
<i>President of parliament</i>	1	0

Indeed, more references were utilised for de-legitimation during Legislature XII (Figure 2). PS deputies, for example, frequently used references for both de-legitimation and legitimation. This was true of other parties like the CDS-PP and the PSD (Table 3), demonstrating the importance of discrediting others in this confrontational political environment.

Following Kingdon (2003), we observe the effect of government changes in the political stream. External referencing in the Portuguese parliament differs depending on whether a party is in government or opposition. Government parties often use references for the legitimation of their own arguments, while opposition parties use them to de-legitimise others' ideas and actions. This variation in the use of external references is especially evident in the arguments of the PS and PSD, which alternate between using external references largely for legitimation in government and de-legitimation in opposition.

### **The problem stream: externalisation as a resource for framing**

The origins of policy problems lie in the framing of situations as issues needing repair. Situations become problems via various routes. Zahariadis (2007) mentions indicators (e.g. results of ILSAs), focused events (e.g. sudden events and catastrophes), feedback (e.g. assessment of pilot programmes), and load (the policymaker's workload).

International actors and instruments can be used as a source of information and authority for formulating new problems. The most prominent examples in the Portuguese parliament are references to the EU and OECD, the international organisations most used as externalisation targets. These organisations are of constant and equal significance (Table 4). They are transversal references, often accumulating with other external references to reinforce arguments regarding most discussion topics. They

**Table 4.** Five most frequent targets of externalisation by Legislature.

Legislature IX (2002–04 to 2005–03)		
<b>Total number of debates:</b> 17	- European countries	58 (42%)
<b>Total targets identified:</b> 60	- European Union	26 (19%)
<b>Total quotations:</b> 137 (100%)	- OECD	13 (9%)
	- Bologna Process	11 (8%)
	- Several/other countries	10 (7%)
<b>Legislature X (2005–3 to 2009–10)</b>		
<b>Total number of debates:</b> 41	- European countries	97 (27%)
<b>Total targets identified:</b> 95	- Bologna Process	92 (26%)
<b>Total quotations:</b> 356 (100%)	- European Union	51 (14%)
	- OECD	37 (10%)
	- PISA	22 (6%)
	- Several/other countries	22 (6%)
<b>Legislature XI (2009–10 to 2011–06)</b>		
<b>Total number of debates:</b> 15	- PISA	21 (39%)
<b>Total targets identified:</b> 37	- OECD countries	14 (20%)
<b>Total quotations:</b> 69 (100%)	- OECD	12 (17%)
	- European countries	12 (17%)
	- European Union	7 (10%)
	- Spain	7 (10%)
<b>Legislature XII (2011–06 to 2015–10)</b>		
<b>Total number of debates:</b> 24	- OECD	33 (21%)
<b>Total target identified:</b> 77	- European countries	29 (19%)
<b>Total quotations:</b> 154 (100%)	- Troika	22 (14%)
	- PISA	15 (10%)
	- European Union	15 (10%)
	- OECD countries	12 (8%)
<b>Legislature XIII (2015–10 to 2019–10)</b>		
<b>Total number of debates:</b> 18	- European countries	33 (29%)
<b>Total targets identified:</b> 50	- PISA	15 (13%)
<b>Total of quotations:</b> 114 (100%)	- OECD countries	14 (12%)
	- OECD	14 (12%)
	- European Union	13 (11%)

support arguments related to the political conflicts between parties, define certain issues as problems with specific characteristics, and validate policy proposals. Their reports and assessment and guidance instruments provide indicators and feedback, while their members and participants' policies are deployed in constructing benchmarks for ideal levels of quality and efficiency. Portuguese governments have asked the OECD for reports, strategically highlighting some ideas, while undermining others. These reports work as useful indicators or feedback, and national policy actors use them to frame problems conforming to their favourite policies.

In addition, the most used reference societies in the Portuguese parliament are not high-performing individual countries but regions of unmentioned – especially European but also OECD – countries linked by these organisations. 'EU countries' (as a regional reference society) is more frequently referenced in parliament compared to other externalisation targets. Overall, 'European countries' is mentioned in 229 quotations. The second most frequent externalisation target is the EU, present in 112 quotations.

References to ‘EU countries’ are used positively (95%) and for legitimation (71%). PS government members and deputies reference ‘European countries’ in 104 quotations. This shows the relevance the party and especially its governments see in EU countries as exemplifying good practice, and the need the former feel to follow their practices and policies to achieve similar levels of education development.

The international instruments associated with the EU and OECD, especially the Bologna Declaration and PISA, show interesting referencing patterns. They are referenced frequently only at specific moments (Table 4). The appearance and disappearance of certain international references reflect an evolution of events in the global and local education policy scenes, and work as focused events, legitimising different parliamentary groups’ presenting of problems. These two instruments serve as our main examples in exploring these variations in the use of external references at specific times.

During Legislatures IX and X (2002–2009) the Bologna Process was frequently referenced in parliament. Of 106 references quotations referring the Declaration, 103 occurred during these Legislatures, especially during Legislature X (referenced 92 times). The country was hotly debating the policy adjustments required to accommodate the measures agreed in the Bologna Declaration. References to the Declaration and resulting Process vanished during Legislature XI, when most legislative adaptations had been implemented.

The use of the Bologna Process to formulate problems intensified when government representatives attended debates, especially about funding for universities or support for students. The left-wing parties (BE, PCP, PEV) strongly opposed reforms that complied with the Declaration’s criteria. These parties largely used the Bologna Process for delegitimation. They highlighted several problems and accused governments and their coalition partners (PSD + CDS-PP, later PS) of strangling universities by cutting funding for institutions and students while increasing tuition fees.

At the end of Legislature X references to the Bologna Process faded, partly because the discussion about the Declaration’s implementation had concluded. However, two other important focused events contributed to this decline: legislative elections were followed by a partial change in the government (several ministers were replaced), with the new minority government (still PS, with the same prime minister) ruling out a coalition; and the national economic crisis and possibility of an external financial intervention increased policymakers’ burden. During Legislature XII the ‘Troika’ (the European Commission, the European Central Bank, and the International Monetary Fund, which monitored Portugal’s economic adjustment between 2011 and 2014), was frequently referenced in parliamentary debates because of strong national hostility to budget cuts.

PISA further exemplifies international indicators and feedback as common routes for the framing of problems. PISA results’ use in the discussion of education has developed over the years, with a significant increase following Legislature X (Afonso and Costa 2009; Costa 2011). Indeed, after Legislature IX’s complete silence PISA emerged as one of the most frequent external references in Legislature X and the main one in Legislature XI. It has since remained one of the five most frequent references (Table 4). PISA, identified in 73 quotations starting in 2005, is referenced more often than any other ILSA in parliamentary education debates (followed by TIMSS in only 6 quotations). PISA is often used to (de-) legitimise policy solutions and as a resource for problem formulation, especially in identifying problems in students’ learning and performance, the need to reformulate legislation, or the problems caused by cuts in public education funding. However, a good PISA

performance does not correlate with the reference societies used in the Portuguese parliament: high performers like Finland or the East Asian countries are very rarely referenced.

The tone concerning PISA's uses is mostly positive. Yet these references' functions depend greatly on the argument. The survey is used to highlight problems from specific angles: governments use it to frame problems associated with their programmes; the opposition uses PISA to frame problems as consequences of the governments' actions and policy decisions.

### ***The policy stream: the need for policy (de-)legitimation***

Kingdon (2003) notes that various policy actors throw policy solutions into the 'primeval soup'. The solutions in this 'soup' undergo selection (softening-up), and only a few are brought into the deeper discussion (Zahariadis 2007). In the Portugal, once a problem is tabled in parliament, an array of alternative policy proposals (already selected from each party's primeval soup) emerges. Debates typically include several slightly different proposals presented by the different party leaders. After the first debate the bills are further discussed in committee, and an amended version is sent back to the plenary for final discussion and a vote. The softening-up process therefore occurs at three levels: within parties; in plenary session; and in committee.

A policy solution must meet three criteria to survive: technical feasibility (its clarity and detail); value acceptability (its compliance with existing values and ideology); and anticipation of future constraints (factors that may disable a programme's implementation) Kingdon (2003, 131–139).

The problems discussed in parliament have remained the same. Barroso (2016) argues that 'when we look at an extended period, we see that the big questions posed twenty years ago remain current today; although many things have changed, everything seems to remain the same' [author's translation]. In our data the main issues debated between 2001 and 2018 were the ongoing subjects which Barroso references: teachers' assessment and recruitment, education funding, equality and inclusion, and students' performance, to name the most relevant. Each party's policy actors present their pre-planned pet solutions to these problems in conformity with their party ideology and policy agenda, and the same solution seems sometimes to recurrently fit different problems. A pattern in the data can be observed which, independently of the debated issue or problem, shows that the CDS-PP party is expected to demonstrate the value of private schools. This argument is sometimes supported by external references. For example, a deputy will use PISA and the OECD countries to justify their view that the minister of education has a limited view of public services, and that private schools should be considered no less a public service than state schools.

Policy's survival on the agenda is evident in the case of the Bologna Process, which was used both to legitimise (58%) and de-legitimise (42%) proposals and ideas. The Bologna Process was slow and problematic in Portugal (Veiga and Amaral 2009; Diogo 2014). There was much discussion in parliament, with both government and opposition encountering difficulty in achieving a consensus on applicable legislation. Externalisation to world situations played into the controversy. While most external references were positive, there were more negative or neutral references to the Bologna Process (31%) than most of the other frequent references in all the studied Legislatures (apart from references to the Troika during Legislature XII). In discussing higher education reforms, opposition deputies referenced the

Declaration to de-legitimise the government's policy proposals and highlighted future constraints arising from the implementation of its policies, such as inequalities in access to university education due to rising tuition fees.

Yet the government referenced the Bologna Process to argue for the importance of proposed legislation to modernise the country and follow or achieve European partners' development levels. They argued that the Declaration's criteria were technically feasible and valuable for the country's development.

PISA was also used to ladle solutions from the policy primeval soup. It was used to (de-)legitimise policy ideas in several areas, among them to legitimise proposals concerning the value of increasing schools' autonomy or the importance of students' free access to schoolbooks.

Interestingly, references to PISA rarely mentioned individual countries. There was no reference to 'PISA countries', and only one to 'PISA's best performers'. 'OECD countries' was the most frequent reference society associated with PISA ( $n = 15$ ), functioning as a benchmark for comparing Portugal with other countries. When a specific country was mentioned in relation to PISA, it was rarely a high performer. Such countries were used as benchmarks in a) identifying problems, b) presenting reform proposals, or c) celebrating the country's performance improvement and demonstrating that recent policy reforms lay behind this improvement. Sweden was the most frequently mentioned PISA participating country (7), followed by Ireland (5), Spain (5), Germany (4), and the UK (4). None performed highly in the survey: they were either countries Portugal had recently surpassed or was close to surpassing in the PISA rankings (Sweden, Spain), or with which Portugal could reasonably aim to achieve parity (Ireland, Germany, and the UK). There is therefore a rational modesty in the arguments<sup>8</sup>: instead of referencing the survey's highest-performing countries, Portuguese policymakers referenced countries whose positions were closer to the country's own. We interpret this as associated with value acceptability: sensing a proposal might be considered technically infeasible (a utopian ambition of catching high performers) and hampered by future constraints (a sense that it would be unrealistic to aim for a top position with the available resources), policymakers opted to use countries whose rankings were in what Bermeo (1992) calls 'geographic proximity' as benchmarks, giving credibility to the argument and less room for de-legitimation.

## **Conclusions**

We explored externalisation to world situations (Schriewer 1990) in the Portuguese parliament's education policy debates, using the MSA's theoretical lenses (Kingdon 2003). We identified and explored the use of external references within the three streams Kingdon proposes (political, problem, and policy). In the political stream, we identified strong party discipline and cohesion in the Portuguese political system (Goes and Leston-Bandeira 2019) as the most influential political aspect of the policy process. This cohesion leads to parliamentary dynamics characterised by conflict and difficulties in balancing the different political forces, with a high incidence of what Hood (2002), among others, calls a 'blame game'. This results in a lack of continuity in public policy and a continuum of incremental, often oppositional, policy changes (Diogo 2014; Barroso 2016) every time the government changes. World situations are referenced to feed parties' arguments in

these struggles for power and consensus and blame others (often the government) for poor decisions and failed policies.

External references to OECD reports or PISA results are used very differently by different actors in the problem stream, as indicators, feedback, and focused events to frame issues as problems. Sections of country-specific reports commissioned by international organisations are also selected and reframed to support problems awaiting addressing by national policymakers and governments. This follows the MSA approach to the problem and the policy stream as Kingdon describes (Kingdon 2003), and concurs with Moiso's (2014) idea that governments promote their own plans with international agendas. Externalisation is used in the policy stream in the softening-up process to legitimise one's own policy proposals or discredit opponent's proposals by highlighting possible constraints of future policies, their technical feasibility, or their value acceptability.

This study adds an analysis of the Portuguese parliament to previous research analysing externalisation in contexts as diverse as Japan, Germany, and the USA (e.g. Takayama 2009; Waldow 2017; Rook and Espeña 2018). This is relevant in clarifying the disagreement concerning the influence of ILSAs like PISA in the (re)construction of reference societies. We have demonstrated that PISA is a significant external reference in parliament, but it does not affect the choice of reference societies used. The reference societies the deputies use reveal the importance of the country's foreign relations. The only country in the five most frequent external references is Spain, which has not performed outstandingly in any ILSA, but with which Portugal has long maintained close relations, and whose levels of development have always been a target. Geographical proximity (Bermeo 1992), country's image of another country or region, and historical, economic, and cultural relationships of cooperation or competition appear to most influence the choice of these references (Waldow 2017).

We identify a similar situation with the OECD and the EU. Portugal's relationship with these organisations is longstanding (Gomes 1999; Moreira et al. 2010; Lemos 2014; Teodoro 2019). With their assessment and guidance instruments, mainly PISA and the Bologna Process, and their affiliated countries, parliament's policymakers perceive these organisations as sources of authority and validation. Relations with these organisations are more prominent because of the national sentiment that has persisted since the nineteenth century – supported by statistics and international comparative data – that the country's education system lags behind other European countries' (Nóvoa 2005). This lag, accentuated during the dictatorship, increases the country's eagerness to attain the levels of development and modernity of countries seen as more advanced (e.g. Gomes 1999; Magone 2006) – precisely the frequently referenced European and OECD countries. We argue that the strong referencing of 'EU countries' and 'OECD countries' represents a clear shift to using the broader regional reference societies constructed by these organisations and constituting general benchmarks for improvement, confirming the previous literature's argument that the concept of reference society that Bendix coined (1978, in Waldow 2017, 2019) needs to be expanded to encompass criteria other than national borders.

The study's contribution to the analysis of the policy process is twofold. First, by exploring how Portuguese policymakers strategically reference international organisations, their instruments, and countries as external sources of legitimacy, we have demonstrated that when a political consensus among various organised political forces is

required, the local ‘socio-logic’ (Schriewer 1990) drives the selection of the external references used. Second, by analysing a relatively long timeframe (17 years), we could identify changes to the external reference points used and the fluctuations in their frequency and modes of use, allowing us to conclude that local conditions and events combined with specific needs for (de-)legitimation at specific moments are the main determinants of how external outputs are interpreted and used. The referencing of the Bologna Declaration and PISA aptly illustrate these fluctuations.

The interpretations of external outputs are volatile and make evident the policy-making process’s non-linearity and complexity. We therefore argue that the use of external references ultimately serves as a mechanism for dealing with contingency and attempting to decrease its characteristic uncertainty and ambiguity, with the aim of convincing others that a certain policy idea is the best solution to a specific problem (e.g. private schools in improving the education system).

The study empirically tested the MSA’s applicability beyond the analysis of federal states to a new policy setting – a parliament in a semi-presidential system. Against the classical view of the MSA that Kingdon (2003) suggests, the parliamentary system – albeit less than federal systems – can also be considered an organised anarchy, characterised by chaotic dynamics, complex interactions, time constraints, and problematic preferences.

Our analysis also revealed the MSA’s suitability for analysing externalisation to world situations. The MSA allows a detailed analysis of the parties’ use of these externalisations in the agenda-setting process in the Portuguese parliament, which demonstrates – while not denying influences from international organisations in policymaking’s national setting – that these are used nationally as external reference points, and as such are instrumentalised by policy actors seeking sources of information to (de-)legitimise arguments within the policy process’s streams. The MSA enables an understanding of how the different parties utilise externalisation as mechanisms to influence the policy process, ultimately opening policy windows and combining the three streams, resulting in policy change.

## Notes

1. Luhmann and his colleague Schorr categorise three kinds of externalisation: reference to scientific evidence, reference to values, and reference to organisation (Steiner-Khamsi 2002). Schriewer (1990) identifies a fourth: reference to world situations.
2. In the early use of reference societies (Bendix 1978, in Waldow 2017) more developed countries were used as models for other countries; later, the concept of reference societies was broadened beyond the borders of nations to include sub-national regions (e.g. Shanghai) and groups of countries (e.g. East Asia) (Waldow 2019, 3).
3. Originally, this study departed from the assumption that PISA influenced Portuguese policymaking after its first cycle. However, the preliminary analysis of the data revealed that PISA was not referenced in education debates in the Portuguese parliament until May 2005. Given that the analysis was ongoing, revealing otherwise interesting aspects of the policy process, we decided to keep the initial timeframe (Dec. 2001–December 2018), expanding the scope from references to PISA and its top performers alone to all the external references used.
4. In post-dictatorship Portugal the periods between elections are called Legislatures and numbered consecutively in Roman numerals.
5. DAR Series I is a meticulous transcription of the debates occurring in plenary session.

6. The data was collected in August 2018 and January 2019, using several keywords: ‘educação’ [education]; ‘ensino’ [teaching]; ‘aluno’ [student]; ‘escola’ [school]; ‘educador’ [educator]; and ‘professor’ and ‘docente’ [both meaning teacher in Portuguese].
7. For example, since 2015 Portugal has had a minority PS government with the pre-agreed parliamentary support of all the left-wing parties in parliament.
8. Also observed by Pi Ferrer, Alasuutari, and Tervonen-Gonçalves (2018) in their analysis of reference to others in Portuguese national policymaking.

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No potential conflict of interest was reported by the authors.

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## Appendix 1.

### Kinds of debate as described in the Portuguese parliament's Rules of Procedure

Government representative must be present at the debate	Kind of debate	Quantity	Explanation
	<i>Debates of interpellation to the government</i>	10	Requested by one of the PGs to discuss general or specific policy topics with the government.
	<i>Debates with ministers (in this case of education)</i>	8	Each minister must be present at the plenary session at least once each legislative session (1 year) to answer deputies' questions on the topics related to his/her area. The president of the parliament sets the date of the debate after discussions with the government and the Conference of Representatives.
	<i>Debates with the Prime Minister</i>	14	The Prime Minister is required to attend plenary sessions twice a week to answer deputies' questions concerning one or more topic usually chosen by the Prime Minister. The president of the parliament sets the dates of the debate after discussions with the government and the Conference of Representatives.
	<i>Urgent debates with the government</i>	10	Both the PGs and the government may request an urgent debate. The request and the reasons for it are analysed by the Conference of Representatives, which sets the date for the debate.
	<i>Debates on the state of the nation</i>	0 (verified but not included)	Regular debates happening at the end of each legislative session arranged by the president of the parliament on a date agreed with the government. During these debates general policy actions and the government's activities are analysed.
<i>Debates do not require the presence of government representatives</i>	<i>Legislative initiatives (debates on reforms)</i>	34	Focusing on one or more bills (Law Project – presented by the PGs; Law Proposal – presented by the government or the government of the autonomous regions of Madeira and the Azores)
	<i>Actuality debates</i>	12	Requested by one or more PGs on a topic considered relevant. These debates may happen up to twice a month. The presence of a representative of the government is not mandatory.
	<i>Thematic debates</i>	2	The president of the parliament, the committees, the PGs, or the government can request a thematic debate. The requester must distribute a document beforehand to all the participants introducing the debate, with supporting documents.
	<i>Political declarations</i>	14	Used by PGs or individual deputies to express opinions on specific situations and events. Each PG has the right to one political declaration a week. Deputies not belonging to a PG may do this up to twice every legislative session, and single deputies belonging to a PG three times in a legislative session.
	<i>Other debates</i>	11	We created this category to include debates that could not fit in other categories, but which concerned education, such as <i>subjects of relevant interest, congratulatory votes, report appreciations, and government declarations.</i>