

Embedded concepts: comparative analysis of the meaning of education policies

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ABSTRACT: The study demonstrates that the definition and meaning of education, and by extension of educational inequality, are embedded in countries' historical, political and social environments while responding to exogenous changes and international trends. We comparatively discuss the experience of 4 countries (Norway, Finland, Lithuania and Hungary) to unpack the historical underpinnings of how education is framed in policy documents. Building on that, we review the effects of neoliberal ideas with their universalist dogma that have affected policy making in all cases and assess to what extent the meaning of education was decoupled from its historical framework. Our findings are relevant for understanding not only the process of policy change but, in particular, how the meaning of concepts within educational policy changes over time. We suggest that embedded concepts carry meaning that has evolved over time and become strongly entangled with the country's history and culture while prevailing ideologies (neoliberalism and, in the case of Hungary, neoconservatism) also generate considerable effects on education policies.

KEYWORDS: embedded, education policy, neoliberalism, national context

INTRODUCTION

Working together in an international consortium representing nine European countries, we embarked on a task of qualitatively discussing the history and development of education policy in our respective countries with a focus on how ed-

educational inequalities were conceptualized and operationalized over time in different countries. This daunting exercise inquired into successful policy interventions that increase education access and uptake. Hence, it necessitated a complex way of thinking about whether inequalities are identified in education policy and, if so, how they are defined. Researchers presented intricate webs of institutional structures responsible for policy-making embedded in their country's political, economic and cultural histories. An investigation into education policy was clearly a lens into the multifaceted histories of nine different countries.

Given the vast difference in how education policy has evolved in these countries, several reports included an explicit critique of “globalized neoliberalism” (Joakim et al., 2022) and a “neoliberal cling” (Toom, Kleemola, Hyytinen, & Tuononen, 2022), while others regarded the overall neoliberal governance as a contributor to myopically reducing the role of education facilitate the transition to the labor market, as in the case of Germany, Finland, Hungary and Norway (Lőrincz, 2022; Toom, Kleemola, Hyytinen, & Tuononen, 2022; Joakim et al., 2022; Bollig, et al., 2022). Then, the importance of neoliberal turn in education emerged repeatedly in further scholarly explorations within the framework of the PIONEERED project. For example, the “Comparative Analysis Report” concluded that the “neoliberal perspective has direct consequences on how educational inequalities are conceptualized and mitigated, in some cases reducing strategies to meritocratic approaches – for example, by alleviating educational inequalities through scholarships” (Dunajeva, 2022, p. 11). Another comparative analysis highlighted a “considerable influence of neoliberal policy imperatives on education policy in both, Hungary and Lithuania” (Dunajeva, Lőrincz, & Siarova, forthcoming).

The role of neoliberalism was then an intriguing question. With this paper, we wish to unpack the role of neoliberal governance on the concept of education and, by extension, educational inequality in policy documents. With that, this paper contributes to the ongoing academic and policy discussions on education policy change and, more specifically, the transformation of education policies to promote equality of opportunity and mitigate educational vulnerabilities. We engage in a policy content analysis (Bell & Stevenson, 2006, p. 11), intending to unpack how the meaning of education and educational inequalities are understood in education policy over time.

CONCEPT DEFINITIONS AND THEORETICAL FRAMEWORK

We are engaging in a study of policy change by looking at the development of concepts—primarily educational inequality—in education policy over time. Considering that we are particularly interested in the understanding of shifts and alterations in the idea of education and educational inequality within education policy, we adopt the framework of studying ideas as discussed by Knodel, Martens and Niemann, whose research focused on the “ideational ‘misfit’ between the ideas of education policy as proposed by the OECD [Organization for Economic Cooperation and Development] with its orientational framework of PISA [Programme for International Student Assessment] and the existing domestic ideas of education that accounts for changes in

national education policy” (2013, p. 424). Following their approach, we regard ideas as beliefs that guide action and frame discussions to mitigate problems (in our case, the problem being educational inequalities) (Béland & Cox, 2011; Knodel, Martens, & Niemann, 2013). What is also relevant to our study of ideas is the process of globalization related specifically to educational equality that has permeated countries around the world (Zhou, Rinne, & Kallo, 2018).

In particular, we are concerned about how historically the idea (or meaning) of education and educational inequality comes about and how that idea is then altered through a competing neoliberal notion of education, disseminated through various institutions and practices, and overarching trends like globalization. With that, ideas are a central analytical frame of this paper. Policies are thus developing (rather than being made) and shaped by complex societal institutions and social structures (Bell & Stevenson, 2006). However, we do not intend to study the role of actors in generating, implementing or reproducing these ideas; instead, we work with descriptions of education systems primarily from findings within the PIONEERED reports, complemented with desk research. In this paper, we suggest that the education policy is embedded in historical, economic, political, and cultural conditions, which, over time, have generated certain ideas about the values surrounding education, including approaches to educational inequality.

The concept of embeddedness has been used before by a variety of scholars inquiring about education policy, in particular focusing on the mutual embeddedness of the global and local spheres (Robertson, 2012), suggesting “embedded policy” can be found “where global policy agendas come up against existing [local] priorities and practices” (Ozga & Jones, 2006). In our paper, we regard various contexts (political, cultural, historical, economic and others) as layers within which ideas and concepts pertaining to education policy are embedded. In other words, education policy is understood comprehensively and in relation to the historical development of the given country. That is not to say that policies are static; indeed, we see education policies as changing over time, with concepts and meanings that are constantly contested, generating a “socioculturally entwined” view of policies (Cahill, 2015, p. 304).

We suggest that embedded concepts carry meaning that has evolved over a considerable period of time and become strongly entangled with the country’s history and culture. Another study that suggests that education policy is defined by historically embedded normative principles is the study of France by Dobbins and Martens (2012), which emphasized the role of historical and cultural values in shaping education policy. Multiple other scholars demonstrated that education policy is embedded in the nation state and its formation, the national economy and national culture, in addition to the various global forces that influenced education policy worldwide (Spring, *Globalization of Education: An Introduction* (2nd ed.), 2014; Marginson & Rhoades, 2002; Mukherjee, 2017). Furthermore, Bell and Stevenson argue in their book *Education policy: Process, themes and impact* that policies are “decisively shaped by powerful structural forces of an economic, ideological and cultural nature,” while they also acknowledge the crucial role of other factors, human agency in particular (2006, p. 6). With this article, we join an established cohort of scholars who see education policy

(or, by extension, education systems) negotiated “between continuity and adaptation” (Dobbins & Martens, 2012).

In short, there has been a vast array of literature concerning education policy; we build on the assumption that education policy has a normative function and that it frames inequalities through different types of knowledge and ideas (Parker, Gulson, & Gale, 2017). We also consider the meaning of education and educational inequality in policy documents as changing over time as a result of transformations in the social and historical contexts, suggesting that the meaning of concepts within education policy is continuously redefined (Zhou, Rinne, & Kallo, 2018). Finally, along with other scholars, we suggest that national policies in many countries are “increasingly framed by the ideologies of a dominant global order that promote particular understandings (Hamilton & Pitt, 2011, p. 596).

METHODOLOGY

This paper relies on national reports (included in the bibliography) produced by researchers who participated in the European Union’s Horizon 2020 research and innovation programme under grant agreement No. 101004392 (PIONEERED). Within this project, researchers from nine participating countries (Finland, Germany, Hungary, Ireland, Lithuania, Luxembourg, Norway, Spain, and Switzerland) conducted a country-level analysis based on pre-determined questions and methodology about how educational policy evolved over time, who the major actors influencing education policy are, in addition to how educational inequality has been addressed in policy documents and how educational vulnerabilities were mitigated.

Researchers identified the most important policy texts that were reviewed and analyzed. In addition, desk research was conducted by all teams to complement the review of policy documents. The produced reports served as the foundation for this paper; hence, the teams’ contribution is invaluable for this study. We recognize the limitations and the criticism of such an approach to policy analysis; already decades ago, scholars have warned against the “technical-empiricist approach to policy analysis in which official documents issued by agencies of the state are interpreted as expressions of political intention” (Codd, 1988, p. 235). Nevertheless, we see value in analyzing policy texts as “policy documents offer background insights into understanding educational problems” (Cardno, 2018, p. 623).

We also acknowledge that policy documents at the time might not reflect the reality. The case of Hungary vividly demonstrated that some goals and values regarding educational equality included in some policy documents, in fact, only appeased international pressure and satisfied international expectations, while implementation of policies largely failed to prioritize educational equality and inclusivity (Ferge, 2017; Lőrincz, 2022). As the implementation of education is outside the scope of this paper, we consider that these limitations do not diminish the value and argument of this paper.

EMBEDDED POLICY CONCEPTS: CULTURAL AND POLITICAL FACTORS

Analysis of educational policies of nine European countries found that in each case, educational inequalities—their conceptualization and operationalization—were embedded in countries’ political, economic, cultural and social contexts (Dunajeva, 2022). In all cases, education policy, and with that, the way educational inequalities were mitigated, were increasingly affected by neoliberalism. This, at times, has generated political conflicts and societal tensions and often resulted in a “disembedded” education policy, where the concept of education was stripped of the cultural and historical meaning that developed over time. We analyze this process through the example of 4 countries: Norway and Finland, analyzed together representing the Nordic model of education, and Hungary and Lithuania, grouped together as post-socialist countries. In the first country pair, we considered the cultural context as the dominant force that shaped the meaning of education and equality, while in the second country pair, we analyze political-historical foundations. We grouped these countries for analytical purposes while also wishing to recognize the complex web of structures that collectively provide the context of education policies.

Cultural context: The case of Finland and Norway

Finland and Norway—countries that share the Nordic heritage—stand out as countries where education is strongly founded on values of democracy, respect for human rights and the recognition of social diversity, resonant with the countries’ cultural and political values. These values are embedded in the historical influence of the Evangelical Lutheran Churches and nation state formation, and although secularization and diversification of the population in these countries have undeniably created new social landscapes in which educational policy is enacted, nevertheless these core values were retained (Kuusisto, Poulter, & Harju-Luukkainen, 2021). The Nordic education model tends to be highly esteemed as it generates an “education for all” culture based on the egalitarian philosophy obliging the state to provide equal education opportunities to every child (Blossing, Imsen, & Moos, 2014).

The formation of education policy in both countries must be seen in the context of the nation-building efforts, coupled with the influence of Reformation and Lutheranism (Horst & Pihl, 2010). These processes are the foundations of educational institutions in Finland and are continuously linked to contemporary Finnish national identity and social values (Rissanen & Poulter, 2023). Education then serves an imperative role in providing equal opportunities to all citizens of these countries in order to participate in society successfully. Equal opportunities imply that “different needs are supported differently and that higher needs elicit more support, but the underlying rationale is that there ultimately should not be differences between people and that no one is more valued” (Bakke, 2023, p. 2). Due to the strong emphasis on providing equal education, this ethos has remained strong within the Finnish mindset until today (Toom, Kleemola, Hyytinen, & Tuononen, 2022).

Accordingly, principles of inclusion, diversity and egalitarianism largely define education policy, and egalitarianism is reflected in the country’s definition of education

and echoed in the way educational inequality is conceptualized (Skarpenes & Sakslind, 2010). In Norway, the idea of a common, comprehensive school has been expressed as a political objective since the end of the nineteenth century (Volckmar, 2016; Joakim, et al., 2022). In later policies, equality and inclusion remained of central importance. More specifically, in Norway, the reform *Mønsterplan for grunnskolen* of 1974 stated that all pupils are different but must be seen as of equal worth; later reforms and current curricula followed these values, strengthening that equal education must be provided to all and education should disseminate values of democracy, human rights and respect for diversity (Bjørnsrud & Nilsen, 2021; Joakim, et al., 2022).

Similarly to Norway, in Finland, a comprehensive school reform was implemented in the 1970s aimed at constructing an inclusive, comprehensive and compulsory education system for all. In Finland, equality is the most important principle in education; education policy guarantees equal educational opportunities for all children regardless of their socio-economic background, ethnicity, gender, or place of living. Accordingly, the Basic Education Act (1998) espouses equality as a principally guiding solid principle with the goal of supporting every individual in their own interests. In other words, education was then one of the most significant spheres where social justice and egalitarianism were to be achieved (Teng, Bakar, & Layne, 2020).

In summary, in both Nordic countries, Finland and Norway, diversity and egalitarianism are historically and culturally rooted, and hence, education policy is mobilized in the interests of promoting and nurturing these values. In both cases, the ethos of equality led to little need to expose and addressing educational inequalities, and “inequality” as a concept is seldom used in policy documents (Toom, Kleemola, Hyytinen, & Tuononen, 2022; Joakim, et al., 2022). With that, scholars have noted that despite the traditional focus on inclusion in Nordic educational models, research has proven that these systems indeed reproduce inequalities, especially for minorities (Corral-Granados, Rapp, & Smeplass, 2023)

Political context: The case of Lithuania and Hungary

In Eastern European countries, historical legacies of socialism have defined education for decades until the collapse of socialism. Education under socialism was initially charged with providing access to those segments of society who had been excluded earlier (e.g., rural and poor populations, women) to establish comprehensive access to education, leading to impressive improvements in access to education for women, for example (Simonová, 2008). Nevertheless, segregated education in the case of students with disabilities led to long-lasting legacies, and segregation has not been fully de-institutionalized for years to come (Bruzgelevičiūtė, 2008; Szabó, 1998). A turn away from socialist principles in education policy was evident already in the 1980s in both countries, when the Lithuanian Concept of the National School (1988) focused on the “humanization” of the education system with schools as democratic institutions (Bankauskaite & Dunajeva, 2022). Similarly, the 1985 Act in Hungary explicitly recognized the role of education in fostering equality and mitigating disadvantages, breaking with an earlier discourse on education (Lőrincz, 2022).

Later policies in the 1990s, succeeding regime change, espoused European democratic political ideas, which were incorporated into the education policy. Accordingly, the Lithuanian Concept of Lithuanian Education (1992) advocated for individual freedom and emphasized the role of schools in building a new, democratic society. Differentiated education for needy children was supposed to facilitate the integration of vulnerable children and assist those “falling behind” (Dunajeva, Lőrincz, & Siarova, forthcoming; Želvys, 2015)kiego. Similarly, the Hungarian Act LXXIX of 1993 on Public Education for the first time referred to equality of opportunity and highlighted the need to mitigate the disadvantages of students in order to ensure they can “catch up” with their peers (Dunajeva, Lőrincz, & Siarova, forthcoming; Lőrincz, 2022).

Enormous changes were brought about at the turn of the century with the EU accession in 2004 and the stronger integration of the former socialist region into global educational processes. In Hungary, preceding the accession in 2022, the government has reacted for the first time to the PISA results of 2000 that revealed significant inequalities and poor quality of the education system (Neumann, 2013). In Lithuania, the reports on the state of education by OECD experts who visited the country in 1995 and 1999 have similarly pointed out inadequacies of the system, including unequal access and performance in education that were then imperative in reforming education policy (Želvys, 2015). In addition, normative pressure before EU enlargement also necessitated adjusting education policies with a focus on cohesion, inclusion and equal opportunities (Dunajeva, Lőrincz, & Siarova, forthcoming).

Overall, it is evident that in both cases, political contexts and political ideologies were among the most significant forces shaping education policy: initially, socialist political ideology defined the approach to education, and after regime change, both countries engaged in the process of liberalization, democratization and renewed efforts of nation-building—priorities included in education policy after the collapse of socialism in the region (Halász, 2015, p. 351). As a result, education policies were increasingly attentive to individual differences and individual needs, as well as the goals of integration and equal opportunities (Bankauskaite & Dunajeva, 2022; Lőrincz, 2022). In addition to that, the newly independent states were eager to integrate with the transnational education governance, which has further impacted their education policy (Dunajeva, Lőrincz, & Siarova, forthcoming).

The topic of transnational education policy making has aroused the attention of many scholars, who tend to consider major international organizations as the most important actors in defining values within transnational policy making (the World Bank/International Monetary Fund, the Organisation for Economic Cooperation and Development and the World Trade Organisation) (Spring, 2008; Moutsios, 2009; Rizvi & Lingard, 2006). Some see these international organizations as “the main promoters of the neoliberal agenda in the discourse, policies and organizational practices of educational institutions” (Moutsios, 2009). However, their role must be seen in the broader idea of the “globalization process under neoliberal inspiration” (Torres, 2008). Beyond doubt, these transnational forces had a major influence on education policy globally, and the next section further discusses how they have influenced the meaning of education and educational inequality.

DISEMBEDED CONCEPTS IN EDUCATION POLICY

Neoliberal forces in education policy

Today, many see neoliberalism as the central political and economic paradigm (Teng, Bakar, & Layne, 2020). Neoliberalism structures social and political relations around the market; in education policy, neoliberalism emphasises ideas such as competition and choice despite evidence of these contributing to gaps in academic achievement and doing a disservice to students with socio-economic status (Volante & Klinger, 2021). Furthermore, neoliberal education policy tends to frame education achievement as individual responsibility, neglecting to address the causes and consequences of educational inequalities (Brunila, 2014). The commodification and corporatization of education (of pedagogy, of students and other aspects related to education) have been widely discussed due to neoliberalism (Fanelli & Evans, 2015; Baltodano, 2023).

Scholars argue that neoliberal ideas, in part, seep into national education policy through international institutions, and PISA is one of the prime catalysts (Uljens, 2007). A very explicit connection between PISA and neoliberal education policy was made by Michael Uljens, who referred to the neoliberal turn in education as the “‘hidden curriculum’ of PISA”:

PISA-evaluation [is] an exponent of an ongoing shift in the educational policy of many countries participating in PISA. The shift is considered to reflect a neoliberal understanding of the relation between the state, market and education. [There are some] mechanisms through which the PISA-evaluations operate in order to promote the neoliberal interests of OECD. (Uljens, 2007)

Other scholars have supported the criticism of OECD in promoting a neoliberal turn in education in its early waves. For example, one study argued that through PISA assessment, the OECD is shaping global and local education policies by imbuing neoliberal logic in policy-making and educational priorities (el Bouhali, 2015). Another study bluntly claimed that “the international assessment of PISA has been regarded as a neoliberal interpretation of the relationship between the state, market and education” (Teng, Bakar, & Layne, 2020, pp. 459-460). Indeed, PISA assessment carries much weight for national education systems; as one study remarked, “Today, hardly any country related to the OECD ignores its data and recommendations on education” (Moutsios, 2009).

Despite academic criticism, PISA sustains its “contemporary status of indispensable resource for the imagination and scrutiny of educational issues and policies” (Carvalho, 2020). Its presence in national spaces has diverse manifestations, such as supporting “analyses and rationales” for the discussion of specific issues or being used as a “source” for secondary studies or as a “learning opportunity” for the development of accountability policies (Lawn & Grek, 2012). The more recent waves of PISA and OECD work also persistently highlight and hence draw government’s attention to the fact that “disparity in educational opportunities faced by disadvantaged students can perpetuate cycles of inequality” and students’ performance is shaped by the education system and environment the governments design (OECD, 2023, p. 24).

PISA assessment is not the only pathway for neoliberal thinking to penetrate national policies. Indeed, the very process of globalization and growing competition between countries, fueled by transnational agreements, negotiations, and assessments, generates a growing influence on the market logic (Wiig, 2023). For our analysis, we wish to unpack the extent to which neoliberal ideas have affected the way educational inequalities are conceptualized in the education policy of the four countries under investigation. We inquire whether the universalist dogma of neoliberalism altered the embedded meaning of educational equality. In a sense, we are examining whether neoliberal forces decouple (or disembed) the way educational equality (and inequality) is framed in policy documents.

Neoliberal effects on education policies

Among the PIONEERED countries, Germany and Norway were described as having experienced a “PISA shock,” which was characterized by shuddering the beliefs of policy makers who had faced poorer results of the performance within the education systems than expected (Joakim, et al., 2022; Bollig, et al., 2022). More specifically, based on the results of the 2001 PISA survey, Norwegian secondary school students were shown to have performed worse than their peers in other countries, generating a broad discussion and, ultimately reforms within education policy (Bjørnsrud & Nilsen, 2021; Joakim et al., 2022). As a result, inequalities received growing attention in policy making. Ultimately, the 2006 Knowledge Promotion Reform—a new primary and secondary education policy—and other related education policies were proposed “to increase the quality rather than the integrative function of education” while also prioritizing issues such as assessment, goal- and performance management (Joakim et al., 2022; Bjordal & Haugen, 2021). To that end, the Parliament established national testing, the results of which were to be published and used for rankings (Joakim et al., 2022). Some further policies were concerned with establishing nationally formulated expected competencies endorsing decentralization of methods and content of education, resulting in a shift in accountability (Joakim et al., 2022).

Criticism has assuredly emerged. The traditional and culturally significant idea of comprehensive schooling (or school for all) in Norway was seen as being taken over by competition (Bjordal & Haugen, 2021; Joakim et al., 2022). The comprehensive schools were still centered on the idea of equality and integration, but the reforms decisively pushed the concept of schooling “towards a neoliberal market logic” (Volckmar, 2016; Joakim et al., 2022). A conclusive criticism of the reforms induced by the PISA shock was explicitly formulated within the PIONEERED report as well: “If the aim is adapted learning, diversity and inclusion in schools, as is stated in the current common part of the curriculum, educational policy should account for much more than measurable standardized results in international surveys” (Joakim et al., 2022). In terms of educational inequalities, the logic of how inequalities in education had to be mitigated with the newly implemented reforms was at odds with the earlier described Nordic model and the individualist approach of Norwegian teachers to addressing disadvantages (Wiig, 2023).

As a top performer in PISA assessments, Finland has generated enormous attention from researchers and policy makers attempting to extrapolate lessons learnt. Scholars have argued that Finland, even with its strong egalitarian and student-centred approach to education, was indeed affected by global neoliberalism, yet not to the same extent as other countries (Teng, Bakar, & Layne, 2020). With that, schooling has arguably been departing from earlier established egalitarian ideals, especially since the 1990s economic recession (Ouakrim-Soivio, Rautopuro, & Hildén, 2018; Muench, Wiczorek, & Dressler, 2023). At this time, the decentralization of education was sped up, but the central importance of trust, accountability and autonomy has mainly been retained by the system (Teng, Bakar, & Layne, 2020)

However, Finland was not spared from the effects of the “global neoliberal paradigm of international testing,” the Finnish curriculum now incorporates competency areas that espouse neoliberal guiding principles in education (Teng, Bakar, & Layne, 2020). Criticism of neoliberalism has only emerged in the PIONEERED report in the context of growing emphasis on school-work transition, framing education as a means to a successful transition to the labor market, and by that stripping the meaning of education from its foundation of equity and participation and giving it a “neoliberal cling” (Toom, Kleemola, Hyytinen, & Tuononen, 2022).

A unique study examining the meaning of education identified evident generational change in how Finnish people relate to education, supporting our argument for neoliberal change in education policy. The authors found that for the older generations, education meant an ideal; for the middle generation, it “means to an end,” while for younger generations, it was seen as a commodity (Antikainen, Houtsonen, Houtsonen, & Kauppila, 1995). The traditional tenant of Finnish society prioritizing equality was deteriorating based on the 2009 PISA results that suggested a degree of polarization of schools, generating debates about the effects of neoliberal education policy (Ahonen, 2014).

In the former socialist countries, neoliberal changes are often tied to regime change itself, when the growing influence of globalization transformed the focus of education policy towards personal self-development and employability, decoupling it from earlier humanistic educational goals set in the 1990s (Pata, Maslo, & Jōgi, 2021). In Lithuania, the earlier mentioned OECD expert visitations highlighted the “need for a new system of standards and assessment” to facilitate comparative performance assessment, which successive reforms have delivered (Želvys, 2015). Changes to education policy also aimed at decentralization and diversification of the education system, and the results had enormous effects on inequalities within education: dropout rates increased, and social stratification was palpable due to the growing gap between educational institutions (Želvys, 2015). These changes brought about several shifts: while the autonomy of freedom of schools has improved and collaboration between schools was enhanced, it simultaneously increased competition, leading to growing stratification and lower quality of education (Urbanovič, Navickaite, & Dačulyte, 2019).

In line with a neoliberal logic of education, inequalities were targeted since providing an opportunity for all individuals to participate successfully in the labor market. What illustrates this reasoning well is the 2011 Revision of the 2003 Law on Education

in Lithuania, which stated that those “poorly involved in learning” must be offered “diverse incentives and conditions for learning [...] even in the most remote rural areas, to develop everyone’s ability to recognize themselves in the world of activity,” and the new vocabulary used in policy documents in Hungary, stressing individual responsibility rather than structural causes for inequality affecting educational attainment (Dunajeva, Lőrincz, & Siarova, forthcoming; Ferge, 2017)a.

Interestingly, in Hungary, the 2000 PISA results were revealed in a “lucky moment” generating a positive change in terms of quality and equality within the education system: after the 2002 Parliamentary elections, the Minister of Education recognized the political and rhetorical legitimating possibilities of addressing Hungary’s poor performance based on the PISA results, and begun a complex process of restructuring the education system with a focus on mitigating inequalities, while citing PISA results as “external authority” (Neumann, 2013). It was only after Hungary’s 2010 illiberal turn and increasingly populist political rhetoric that educational policy turned away from its earlier principles of education equity—operationalized in policy documents with concepts such as inclusion, integration and desegregation—and prioritized values such as religion (Christian values) and the nation (Neumann, 2023; Lőrincz, 2022). In this educational landscape, vulnerable groups were expected to “catch up”, while some support was provided to “compensate for disadvantages” (Ferge, 2017; Lőrincz, 2022). As a result, inequalities in education were further de-emphasized following the illiberal turn in Hungarian politics after 2010, a political change that coupled with deteriorating democratic principles and centralization of schools (Dunajeva, Lőrincz, & Siarova, forthcoming; Lőrincz, 2022).

Hungary is then an interesting case study where the global neoliberal logic of education may be challenged by the dominant political ideas of conservatism and right-wing politics (Neumann, 2023). This remains a largely unaddressed topic and scarcely studied by scholarship. It is indeed an important issue to address for future policy researchers whether the populist political movements, not only in Hungary but in many other countries around the world, may turn into a challenge (and waning) of neoliberal hegemonic structures and how this restructuring would affect education policy (Neumann, 2023; Cohen, 2021). Arguably, the neoconservative educational policies a la Hungary are, in fact, “strengthening educational inequalities” (Neumann, 2023).

SUMMARY

In summary, this paper began by discussing education policy as embedded in historical, political and cultural contexts that shaped the meaning of education and educational inequality over time. We presented this argument in a short overview of 4 countries (Norway and Finland, as well as Lithuania and Hungary), highlighting the meaning of education that was rooted in a set of historical processes. We then inquired whether the universalist doctrine of neoliberalism has restructured education policies in the countries under investigation. We found that neoliberal restructuring of education systems has generated somewhat dissimilar results: in Finland and Norway, neoliberal policies generated criticism regarding the loss of the earlier ethos centered on

equality and inclusiveness, leading to a sense of growing competition and commodification of education. This has also resulted in growing inequalities within education. In Lithuania, neoliberal policies were gradually implemented since the regime change, also creating increased competition, favoring decentralization and introducing free school choice and standardization—while some important aspects of the quality and content of education were successfully addressed, nevertheless it also heavily shifted educational goals to serve economic instrumental goals, decoupling from the earlier sociocultural goals (Pranckūnienė, 2017).

Hungary was a particular case, where initially neoliberal policies—after the 2000 PISA results—led to a reorientation of education policy to pay decisively more attention to issues of unequal access and performance in education, generating debates and eventually policy changes to mitigate vulnerabilities. A significant adverse turn appeared with the populist and neoconservative political turn in the country, which subsumed once again educational goals under the dominant political ideology, assertively breaking with the goals of past policies. After that, education policy was largely disinterested in addressing educational inequalities.

Overall, the paper suggests that the meaning of education and educational inequalities are social constructions that are produced and negotiated through an interplay between structures and exogenous factors. While in each of the countries analyzed, the definition of education and educational inequality has evolved over time, strongly reflecting a society's political, economic and social makeup, we also recognized that external factors, such as neoliberalism, have a significant impact on education policy. Our findings point out that while transnational formations (such as OECD) possess only soft power, they can become the tool for the promotion of specific ideas and have the power of persuasion (Martens, Kerstin, & Jakobi, 2010; Marcussen, 2004; Knodel, Martens, & Niemann, 2013). However, we highlighted that neoliberalization of education is not a straightforward process with a pre-defined outcome. Instead, there is a negotiation and mediation of neoliberal forces, given national characteristics (Teng, Bakar, & Layne, 2020).

Finally, this paper showed that values in education that defined how educational inequalities are conceptualized and applied in education policy in some cases were compromised by the neoliberal turn in governance and, as a result, became disembedded from various national characteristics that earlier defined education policy. Yet, we did not see policy convergence as a result of globalization (and the spread of the neoliberal agenda), and there is a wide variation in how education is framed in policy. With that, we maintain the argument that education policy, even in times of globalization, must be seen as embedded in the broader national structures; the concepts and meanings within education policy documents are, however, continuously reacting to various changes and, in the process, become negotiated and renegotiated.

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