

The Peruvian case for students' national assessments (1995-2015): Navigating between global
and national discourses

Research Master Paper

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Dedication

This Master research paper is dedicated to the Peruvian educators that work with honesty to improve education quality and equity of our diverse nation:

To the ones that believe in the power of education for expanding horizons, improving lives, and fostering freedom.

To the ones that trust and respect every single individual and culture as being unique and valuable.

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Educational systems carry the narratives of the nation.

Popkewitz and Rizvi (2009)

Abstract

National assessments of students' learning outcomes is an established and technically solid practice in the Ministry of Education of Peru that has evolved and expanded since its inception as an imported idea in the 1990s. This research paper draws on the literature, official documents, and my own experience to analyze from a critical perspective the localization, development and expansion of the national assessments and the discourses that they have mobilized in Peru in the last 20 years. The analysis of the Peruvian case study for policy transfer is based on the structure of the stages of the model of Phillips and Ochs (2003).

In this journey global and local discourses shape spaces where standardized assessments as a measurement of quality learning outcomes has been positioned as a discourse of technical knowledge. As a consequence, the trend for national assessments has expanded reinforcing the logic for monitoring and generating information from the outcomes of the educational system. This expansion may lead to the possible concerns of (1) obscuring its relationship with the search for a contextualized education quality, (2) reproducing itself as a valued technical knowledge by the regional governments, (3) not having a design to serve the purpose of providing feedback for decision and policy making for improvement, and (4) opening up the possibility of its use as a high stake policy incorporating incentives and competition rules.

Keywords: standardized assessments in Peru, policy transfer process, global trend and discourse for educational assessments.

The Peruvian case for students' national assessments (1995-2015)

Las evaluaciones nacionales de aprendizaje estudiantil constituyen una práctica técnicamente sólida en el Ministerio de Educación del Perú que ha evolucionado y se ha extendido desde sus comienzos en los años 90. A nivel nacional estas evaluaciones proveen información para el mejoramiento y la toma de decisiones educativos, desencadenando recursivamente discusiones y reacciones en el país con respecto a la calidad de la educación básica. El presente informe de investigación hace uso de la literatura, documentos oficiales y mi propia experiencia para analizar desde una perspectiva crítica la localización, desarrollo y expansión de las evaluaciones nacionales y los discursos que estas movilizan en el Perú en los últimos 20 años. El análisis constituye un caso de estudio de transferencia de política basado en la estructura de fases del modelo de Phillips y Ochs (2003).

En este trayecto discursos globales y locales conforman espacios donde las evaluaciones se ha posicionado a sí misma como un discurso de conocimiento técnico. Como consecuencia, la tendencia de las evaluaciones nacionales se ha expandido reforzando la lógica de monitorear y de generar información de los resultados sistema educativo. Esta expansión puede estar conduciendo a posibles situaciones problemáticas: (1) opacando su relación con la búsqueda de una calidad educativa contextualizada, (2) reproduciéndose en los gobiernos regionales como un valorado conocimiento técnico, (3) no estar diseñadas para proveer retroalimentación para la toma de decisiones y políticas de mejoramiento, y (4) abriendo posibilidades de su uso en políticas de altas consecuencias incorporando reglas de incentivos y competición.

Index

Chapter 1: Introduction	6
Chapter 2: Literature Review	19
Global trends for Educational Assessments and the Local Search for Quality	19
Appropriation of Policies and Discourses.....	30
Educational Transfer: Origin, Recontextualization and Internalization	34
Chapter 3: Analysis of the Peruvian case 1990 – 2015	44
An analysis using the Policy Attraction to Internalization model	44
The context in Peru in the early 1990s.....	49
Stage 1 - 1990-1995: Cross-National Attraction: Impulses and Externalizing Potential.	
“Assessments and Measurement Lent in a Borrowed Package of Reforms”	52
Stage 2 – 1996-2000: Decision. “Technical And Political Mismatch”	59
Stage 3 – 2001-2005: Implementation. “Consolidation of the technical knowledge”	67
Stage 4 – 2006-2013: Internalization. “Expansion of Assessment and Measurement Logic” .	79
Stage 1 – 2014-2015: “Cross Sectoral Transfer, Reproduction of knowledge”	88
Chapter 4: Discussion and Conclusions.....	95
References.....	104

Chapter 1: Introduction

Policy travels around the world as a result of various motivations, interests, or pressures. In the comparative education field considerable studies account for the relationship between forces in the supra national, national and the local levels showing the interrelationship, challenges and transformations of policy transfer in local contexts (Beech, 2011; Steiner-Khamsi, 2004). Scholars analyze and explain specific characteristics, trajectories, politics, and agents of policy transfer. In a global network policy travels without a fixed pattern and evolves in unpredictable ways. In some cases, it is possible to trace how a policy travels, its origin and destination; in other cases, the origin is unclear remaining as an externalized influence justifying policy reforms (Vavrus, 2004) or vanishes in the local process of ownership (Spren, 2004). In this process of policy transfer, the phase of internalization of policies entails contextualization and recontextualization according to the understanding, context, resources, interests, and politics of local players (Phillips & Ochs, 2003). Recontextualization creates new spaces where the global and the local discourses as well as the normative policy and its appropriation are in constant negotiation producing and reproducing knowledge and power.

One of the policy ideas that travel globally is assessment for quality assurance based on a common core of prioritized learning. This currently traveling trend can be found in national education systems as well as in cross-national assessments, such as Programme for International Student Assessment (PISA) or Latin American Laboratory for Assessment of the Quality of Education (LLECE). Policies for standardized assessments intend to make education systems within a country and among countries accountable for quality learning, and can be an opportunity for evidence-based analysis of the conditions of equity and efficiency for reaching this quality.

The Peruvian case for students' national assessments (1995-2015)

Assessments of students' achievement as outcomes of the educational systems have expanded and become incorporated in national education policies, cross-national studies, and international agreements. For instance, in 1990 economically developed member-states of the Organisation for Economic Co-operation and Development (OECD) agreed to have standardized assessments in their process for monitoring quality to ensure a skilled workforce, to audit learning outcomes and quality control, to systematically monitor educational progress, and to put an end to school failure (OECD, 1995). Another example is the emphasis on basic learning needs and outcomes of the World Declaration of Education for All in 1990, underscoring learning acquisition as the focus of primary education stating therefore that it is "necessary to define acceptable levels of learning acquisition for educational programmes and to improve and apply systems of assessing learning achievement" (UNESCO, 1994. p. 5). These examples show how developed countries and international organizations posit learning as an indicator of quality and the need for evaluating learning acquisition or achievement as a means to monitor and account for the outcomes of education systems.

The relationship between these global and national trends for assessments can be questioned as an idea attached to a discourse of monitoring and measurement lent by international agencies such as the World Bank as part of the package of reforms borrowed by developing countries. This idea for assessments at the international level has expanded and may be promoting a normative discourse of "cross national standards of educational quality". Therefore, "the international tests and the international goals are the operationalized quality standards upheld by the various regimes of radical educational advocacy" (Valverde, 2014, p. 584) challenging the national capacities for navigating between the international requirements and the national aspirations for a contextualized education quality.

The Peruvian case for students' national assessments (1995-2015)

In Peru as well as in other Latin American countries national assessments were implemented in the 1990s and became regular practices that have evolved according to the needs and priorities of their educational systems. In Peru national assessments have technically developed and strengthened as an official and regular practice for quality and equity improvement and decision-making. However, in this evolution since 1990 it is unclear how the standardized assessments and with what mechanisms are contributing to the improvement of education quality.

The Peruvian Case

This research paper follows the Peruvian journey incorporating and developing assessments as a technical endeavor for decision and policy making for improvement of basic education quality since 1990.

Programs and reforms implemented in Peru were similar to those of other Latin American countries in the 1990s with funds from the World Bank for primary education, such as (1) improving quality of teaching and learning through the provision of instructional materials, teacher training, and curriculum reform, (2) the modernization of educational administration (management skills of principals, regional and local administrators, national network system of information for schools and students, system of measuring students achievement), and (3) improving school infrastructure (Hunt, 2001). Later on the intervention was extended with funds from the Inter American Development Bank in 1997 to preschool education and in 2001 to secondary education (Guadalupe, 2001). It is worth noting that in Peru these reforms for education improvement were implemented with the purpose of improving quality and equity. The Peruvian General Education Act (2003) defines quality as the “optimal level of formation

The Peruvian case for students' national assessments (1995-2015)

that a person must reach to face the human development challenges, exercise their citizenship, and continue a lifelong learning” (Ley General de Educación of 2003).

A benchmark in the assessment for the measuring learning quality is the creation of the Measurement Quality Unit in the Ministry of Education in 1995 as part of the package of reforms implemented in that decade with loaned funds from the World Bank. On this journey from 1995 to 2015, as will be seen in the third chapter of this paper, Peruvian national assessments evaluations have developed and expanded. The idea of assessments and measurement has been gradually positioned within the education sector and recognized as highly desirable in the normative discourse of policies. Gradually it has expanded into other educational programs at the national level, such as the teacher's performance assessment. At the sub national level, as part of the decentralization process that includes the transference of funds from the national level authority, the implementation of students' large-scale assessments is a current regional endeavor¹.

In the last 20 years (1995-2015) during 5 governments (presidential periods) the emphasis of the role and use of the information from assessments has changed according to national political requirements, priorities in the investment of economic funds, and the role of education in the pursuit of quality education and equity as a middle income country. As a result, not only did educational spaces occur where global, national and local ideas and influences were negotiated, but also technical and prestigious knowledge was created and reproduced.

I argue that standardized assessments as a measurement of quality learning outcomes are assumed to being an opportunity for decision-making and improvement; however, in the process

¹ Presentations of regional governments in the Seminar “Uses of the students' performance assessments in Peru”, organized by the Educational National Council in March 2015. See <http://www.grade.org.pe/novedades/cne-y-forge-debatieron-usos-de-las-evaluaciones-de-rendimiento-escolar-en-el-peru/>

The Peruvian case for students' national assessments (1995-2015)

of contextualization the idea of assessments has been positioned as a discourse of technical knowledge. As a consequence, the trend for national assessments has expanded reinforcing the logic for monitoring and generating information from the outcomes of the educational system. This expansion may lead to the possible concerns of (1) obscuring its relationship with the search for a contextualized education quality, (2) reproducing itself as a valued technical knowledge by the regional governments, (3) not having a design to serve the purpose of providing feedback for decision and policy making for improvement, and 4) opening up the possibility of its use as a high stake policy incorporating incentives and competition rules.

This research paper analyzes the Peruvian case of contextualization and appropriation of the idea for assessment and measurement of basic education since its inception in the 1990s. This idea lent by the World Bank was included in the package of reforms borrowed by Peru for primary education and has developed and expanded in the last 20 years.

In order to analyze this evolution, the following research questions guide this study:

1. How is the global trend for educational assessments and measurement contextualized and appropriated in Peru?
2. Is the Peruvian case an example of borrowing and lending?
3. What are the spaces and discourses shaping the process of internalization of the assessments in Peru?

The following description of the situation in Latin America in the early 1990s can contextualize the Peruvian case for standardized students' assessments.

The Latin American context

In Latin American countries, the global trend for assessment and accountability for transparency landed as a part of a package of education reforms from international agencies such as the Inter American Development Bank and the World Bank in the 1990s. In this decade, Latin American economies were growing after the implementation of drastic macroeconomic measures in agreement with the International Monetary Fund, so governments felt pressured to improve educational quality and its distribution in order to train human resources to sustain the economic growth (Schiefelbein, 1995; Plataforma Regional sobre Educación en América Latina [PREAL], 1998). The implementation of national reforms allowed the governments of the region to increase per pupil expenditures, expand access to primary education, and to implement basic education reforms such as curriculum improvement, teachers' in service training, decentralization, and school autonomy, and assessment systems (Schiefelbein, 1995; UNESCO, 2001a). Despite these efforts educational systems showed a low quality of learning, inequality of opportunities by ethnic-linguistic or socio economic levels, and a lack of efficiency with high repetition and dropout rates (UNESCO, 2001a). Primary and secondary education in most Latin American countries remained inadequate with multiple causes (Schiefelbein, 1995) that required integrated reforms of national consensus and long-term commitments (Tedesco, 1994).

By 1998 the International Commission of Education, Equity and Economic competitiveness in Latin America and the Caribbean issued a report called *El futuro está en juego* (The future is at stake²) stating “good quality schools are crucial for the generation of economic growth, the promotion of equity and to strengthen democratic governments” (PREAL, 1998, p. 2). It recommended four complementary actions: (1) the establishment of standards for the educational system and to measure their accomplishment, (2) to give schools and

² Documents in Spanish have been translated by the author of this research paper.

The Peruvian case for students' national assessments (1995-2015)

communities more control of education, (3) to strengthen the teaching profession by increasing their salaries, reforming their training and, promoting more responsibility for the communities they serve, and (4) to increase the investment per student in basic education (PREAL, 1998). Thus, the discourse for improvement of the educational systems included remarkably similar reforms for the Latin American countries that included the novel idea of standards and measurements (Beech, 2011). In this context, the Regional Office for Education in Latin America and the Caribbean of UNESCO (UNESCO, 2001b) created in 1994 the Latin American Laboratory for Assessment of the Quality of Education (LLECE) with funds from the 13 participating countries, UNESCO, the World Bank, Inter American Development Bank (IDB), the Ford Foundation and the Andrés Bello Agreement (UNESCO, 2001b). In the 1990s most Latin American countries with few exceptions established their official national assessment systems (Ferrer, 2006).

Theoretical framework

The analysis is based on three bodies of literature: (1) global discourses for assessments and accountability challenging the search for education quality of national education systems in a globalized economy, and the methodological implications for the analysis of this interconnection, (2) the processes of policy formation and policy appropriation of global discourses in local spaces negotiating meanings and priorities, and (3) the process of educational transfer through the mechanisms of borrowing and lending with emphasis in the contextualization and internalization processes.

Firstly, in the education field in globalized and interconnected times, there are national and international players as well as national authorities and international agencies and organizations

The Peruvian case for students' national assessments (1995-2015)

negotiating, in particular, the pressures and discourses related to competing in a global market (Carnoy, 2014). This negotiation can entail borrowing and/or lending ideas and reforms for education improvement. One of these ideas is the role of assessments as systems for measuring learning outcomes of the educational systems and the role of international organizations advocating for its expansion. Strategies implemented by the international organizations in developing countries to promote the countries involvement in assessments were: (1) the World Bank and UNESCO's training courses on assessment and testing and publications, (2) the inclusion of a testing component in the World Bank's education projects to obtain evidence of efficiency or effectiveness of the education system through measuring students' achievement, and (3) the experience of participating in cross-national assessments, such as the Laboratory of UNESCO (Lockheed, 2013). National assessments have significantly increased in low-income countries around the world, from 0% in the period of 1960-1989 to 64% in the period of 1990-1999 (Kamens, 2013).

However, in this globalized economy that is prioritizing certain trends and frameworks in education the nation-states have the possibility to lead their educational systems according to their own priorities (Dale, 2009; Carnoy, 2014). Therefore, global pressures in education, such as the trend for measurement and assessment can be redefined according to the national priorities.

As a consequence there is a constant tension between discourses for assessments and measurement in spaces where supranational, national and subnational players exchange political and economic priorities and discourses for education (Larsen & Beech, 2014). The spaces and dynamics of this exchange problematizes methodological concepts for the analysis of the global in education such as (1) the opposed and vertical relationship between the global operating in a supra national level and the local at the national level rather than in a relational manner

The Peruvian case for students' national assessments (1995-2015)

(Robertson, 2012), (2) the binary distinction of space as global and place as local leading to the understanding of globalization as a hegemonic process affecting the nation-state (Larsen and Beech, 2014), and (3) the nation-state as the unit of analysis, and as a political cohesive entity that makes political decisions (Verger, et al., 2012).

The analysis of the relationship of the global and the local is dialectic and does not have specific geographic boundaries. The global in education rather than leading to homogeneous systems, highlights the coexistence of contrary currents such as the internationalization/indigenization or the supra-national integration/intra-national diversification (Schriewer, 2003).

Secondly, policy formation and policy appropriation as active processes and cultural activities entail a negotiation of meanings about educational models and frameworks. Policy formation, the normative dimension of policymaking of assessments and measurement is interpreted through the appropriation process as a cultural activity mediated by beliefs, values and identities (Levinson and Sutton, 2001). Contextual factors such as the social, political and economic characteristics also shape epistemologies and the process of policy appropriation of imported ideas (Vavrus and Bartlett, 2012) leading to a recontextualization process of international trends and frameworks. Political, economic and ideological dimensions of policymaking (Ball, 1990) are also negotiating meanings, interests and power at the international, national and subnational levels through the implementation and release of information of cross-national and national assessments. Discourses supporting the need for assessment and measurement of education outcomes and the use of this information are expanding with the participation of international and national players interacting in the same social space. In this space this discourse is appropriated by the political and educational

The Peruvian case for students' national assessments (1995-2015)

authorities, expressed in policies and acts, and expanded to educational reforms in other areas like teachers career and schools accreditation. In this process of expansion the discourse of assessments is appropriated by the political and educational authorities of the subnational level reproducing the technical knowledge positioned at the national level.

Thirdly, the process of policy transfer through borrowing and lending sheds light on the process and evolution for assessment and measurement in Peru as being an imported idea and a global discourse. Foreign examples from elsewhere can be a package of reforms borrowed from international agencies. These reforms are not neutral and have attached frameworks advocating the need for monitoring their effect in the learning outcomes (Lockheed, 2013). However, the processes of recontextualization and internalization of this particular idea is not linear and has developed according to the political and economic contexts in Peru in the last 20 years.

Backward and forward movements in a social space where international and national institutions are interacting have led to a national assessment system technically solid but politically fragile. The fragility resides in the paradox of counting on a highly technical practice appreciated as valuable and reliable but not linked to clear mechanisms for improvement of education quality, and ultimately not contributing to the discussion of a contextualized agreement of the operationalization of this quality. Therefore, the technical knowledge is available to be used according to the political emphasis of the different governments. The model for cross-national transfer of Phillips and Ochs (2003, 2004) is used with the purpose of tracing the evolution of the idea of assessments in Peru. This model is a structure that contributes to the analysis by describing four stages in the process of borrowing, from the cross-national attraction, decision, implementation and internalization stages.

The Peruvian case for students' national assessments (1995-2015)

Positionality

As a Peruvian educator I started working in the Ministry of Education with the project to reform secondary education with funds of the Inter American Development Bank. In 1998 I was in charge of the design of the curriculum of language (Spanish) for the secondary level with a new approach based on competencies and in 1999 I was responsible for the research team implementing a case study in 54 secondary schools of the country in order to analyze the implementation of the new curricular framework. In this period I have witnessed the challenges of having a balance between having technical proposals and the implementation of new imported frameworks on a national level within the timeline agreement with the bank. I resigned when I noticed the predominance of political interests rather than evidence based decisions from our research by the top authorities of the Ministry by the end of 1999.

The process of contextualization of students' assessment in Peru in the Ministry of Education was challenging given that it was a 'new' idea assigned to a recently created Quality Education Measurement Unit (UMC) as part of the loan with the World Bank in 1995. This endeavor was initially part of the package of reforms that the Ministry had to implement with national resources and funds from the loan of the World Bank for primary education. In this context, the chief of the UMC hired me to coordinate the team in charge of developing the pedagogical design for the national tests in 2001, and together with him to coordinate the implementation of the PISA for the first time in Peru. This experience was challenging as an educator because the UMC was defining its role and looking for frameworks to link assessments with meaningful information for decision making for improvement. The reflections from the team contributed to changing the model of the national assessments from norm-referenced to criterion-referenced. I have also been part of the team coordinating directly with the OECD

The Peruvian case for students' national assessments (1995-2015)

specialists discussing the appropriate translation of the tests and I was also trained in The Netherlands about the criteria of coding open-ended questions of the reading comprehension tests.

Therefore, I was part of two teams in the Ministry of Education in two opportunities during a period of reforming the Peruvian educational system with international funds. I learned to think and to make decisions with repercussions at the national level. Part of this learning was also to understand the pressures of the timeline of the international agencies, and the lack of experience of the teams within the Ministry of Education to implement the newly borrowed frameworks. Importantly, I have experienced the challenges of the policy appropriation process as a professional, and I have witnessed this process from within the teams of the Ministry of Education as well as with the teams of the subnational officers during the implementation of the curricular and assessment initiatives.

On a personal level, the experience of writing this research paper has fulfilled a need of learning frameworks from different disciplines and to apply them to better understand and analyze a case of policy transfer in Peru.

Significance of the study

The study of the evolution of the idea of assessment and measurement of basic education and its internalization as part of the Peruvian education system is relevant for the country. This contributes to the examination of the role of assessments for policy making, improvement, or other, as well as its relationship with the pursuit of a localized education quality.

The analysis of the Peruvian case traces a process of policy transfer, development and internalization analyzing the spaces where international and national players have been

The Peruvian case for students' national assessments (1995-2015)

interacting in the last two decades. The analysis of these spaces is in the core of the comparative education field for the following reasons: 1) it considers the relationship between international, national and subnational levels in social spaces shaping networks for policy and decision making within a single country, 2) it describes a case of policy transfer of a global discourse and a trend for assessment and measurement in a globalized context, and 3) it applies the model of policy transfer of Phillips and Ochs (2003) as a structure for the analysis of a non linear process of lending and borrowing, discussing its pertinence to the particular Peruvian case.

Limitations of the study

This research paper is based on the review of the literature and on Peruvian official documents and does not incorporate empirical data collection to contrast the written information. However, while writing this paper I was in contact with Peruvian authorities in the Ministry of Education that have provided me with documents and insights for my reflections.

The national assessments as a official instrumental policy provides information for improvement that can be more fully analyzed in relation to other policies to improve quality and equity in the educational system. However, this endeavor exceeds the scope of this paper.

Summary of the research paper

The second chapter of the paper presents the review of the literature of the bodies mentioned above. The third chapter analyzes the Peruvian case of policy transfer following the stages of the Phillips and Ochs' (2003) model. The final chapter presents the conclusion and discussion in regard to the Peruvian case and the application of the model in its analysis.

Chapter 2: Literature Review

In the scope of this literature review I will discuss the literature on the trend for assessments of quality learning outcomes through global education policies, policy formation and appropriation, and policy transfer through borrowing and lending studies. The review of these bodies of literature sheds light on the analysis of the acquisition, implementation and expansion of policies and discourses about national assessments in Peru in the last 20 years. The analysis will focus on the relational character of the global and local policies, ideas, and discourses, with emphasis on their recursiveness and development in the process of internalization. In this process these discourses and ideas are developed, resignified, and expanded creating new spaces where the global and local political, educational and economical discourses are in constant negotiation. There is a dynamic between the agencies of governments, national and international institutions, the political and cultural contexts where assessment policies are implemented, discourses circulate and knowledge in regard to assessments is shaped and reproduced.

Global trends for Educational Assessments and the Local Search for Quality

Education and globalization and more precisely the analysis of the relationship between education and globalization, and if and how education is facing other challenges in globalized times is a relevant topic to frame the Peruvian case study. The relevance resides in the interrelationship between the global and the local contexts in an increasingly interconnected setting as well as its methodological implications.

Research debates point out that globalization is not a new phenomenon, manifested in the interconnectedness, flows, networks, and exchange in the political, social, economic and

The Peruvian case for students' national assessments (1995-2015)

religious realms. What is rather new is the “intensification and acceleration of such flows, and of attendant transformations of social organizations in nearly every field of activity nearly everywhere across the globe (Held et al., 1999 as cited in Schriewer, 2003, p. 272). The accelerated flow of knowledge, circulating mainly through the science NGOs and communications technologies, plays a notable role in these transformations.

Schriewer (2003) points at specific indicators of international communication and cooperation networks in the education field: (1) institutionalized procedures, such as the International Baccalaureate or international assessments, (2) international governmental organizations involved in research, documentation, and programs for development on a large scale, such as the World Bank, UNESCO, OECD, (3) congresses and conferences where experts and consultants disseminate education policies and models, and (4) international academic associations, such as science NGOs disseminating their methods and rationality. Therefore, there is an interconnected context with international influences for educational policy, for Carnoy (2014) globalization and information and communication technologies have increased economic competitiveness and that there are new forces shaping educational politics, policies and educational outcomes. From this perspective, education is a means for knowledge and skill development associated with economic growth, and labor for globalized markets. Globalized thinking underscores teaching of mathematics and science as related to technology and industry, as well as comparing student performance between countries, and tracking efficiency and quality of educational systems. The measurement of student performance as an indicator of quality has been promoted by international organizations, such as the OECD, the World Bank, and the Inter American Bank; by NGOs, such as the Inter-American Dialogue, and by bilateral agencies, such as the U.S. Agency for International Development. These organizations have a common vision of

The Peruvian case for students' national assessments (1995-2015)

better education in relation to productivity and economic development. Standardized tests of students' performance, such as PISA of the OECD or Trends in International Mathematics and Science Survey (TIMSS) of the International Association of the Evaluation of Educational Achievement have become salient, with an increasing number of participant countries (Carnoy, 2014). However, for Carnoy (2014) nation-states can mediate the impact of globalization in education, and through their political and economic decisions, can distribute more equally knowledge and access to education, promoting quality of education for the poor in a globalized economy. Interestingly, some developed and developing countries are examples of filters of global concepts, turning them into positive conditions for educational change. For example, states can have their own interpretation of the role of educational measurements, emphasizing the political use of the standardized test results to foster policies to obtain resources without a great deal of public controversy, rather than focusing on efficiency.

The context for national education policies is challenging given the pressure of the global economy, globalized thinking, and international networks with agendas such as the assessments and measurement of educational outcomes. However, nation-states have the agency to deal with these pressures mediating and transforming them into local proposals with local purposes. Importantly, debates and studies in the comparative education field have demonstrated that globalization, far from leading to a universal model of education, in Schriewer (2003) words:

What seems to predominate, instead, is the simultaneity of contrary currents – of internationalisation and indigenisation; supra-national integration and intra-national diversification. The global spread of standardised educational models (regardless of differing societal settings) and the surprising diversity of sociocultural interrelationship networks (in spite of the universalist assumptions of grand theories) are connected to one

The Peruvian case for students' national assessments (1995-2015)

another as challenge and response, as large-scale socio-economic processes and these processes' unintended consequences. (p. 273)

This complex and dialectic globalized setting impacts education policy in several ways. For instance, global trends for measurement and assessments have an economic framework that could be locally recontextualized in order to have an explicit link with a local definition of education quality.

Education quality is an aspiration of the educational systems of the nation-states. The opportunity for achieving learning and its equal distribution was explicitly stated as a global agreement in international organizations as the World Conference of UNESCO in 1990 posit learning as an output of the educational systems. However, the dominant discourse of education quality has been narrowed by national and international institutions to learning as the outcome of the educational systems, changing the focus of the economists from inputs to outputs of these systems. Consequently, the definition of quality learning and the measurement of this learning turned out to be necessary and highly desirable. Learning tests or achievement tests are commonly used to monitor learning and are focused on the skills or knowledge resulting from schooling (Lockheed, 1996).

According to Lockheed (1996) assessments have various purposes such as monitoring achievement over time and for education management. For monitoring achievement it is necessary to have standardized tests in content, behavioral objectives, format, administration procedures, and scoring. Assessments for education management requires information for decision-making regarding how the education system is achieving its goals, the performance of individual or group of schools or locations, the effects of policies for improving schools. Thus, this type of information (1) is generally about the system for improvement, (2) includes

The Peruvian case for students' national assessments (1995-2015)

information of associated factors and inputs, (3) uses standardized measures of students learning, and (4) is disseminated to different audiences. However, the link between the administration and analysis of the assessments and the change of teacher training and practices at the classroom level are not always clear. Countries do not always have the capacity for using the information of the assessment to link teaching-learning processes resulting in students learning improvement (Benavot, 2012).

Assessments have been incorporated by developing countries with the technical and economic support of institutions such as the World Bank as it has been encouraged by the World Conference on Education for All in 1990. The purpose is that educational systems monitor their own outputs, as well as to monitor the impact of the reforms in student's learning financed by the Bank (Lockheed, 1996), which can be practically and methodologically questioned. Also, assessments provide the World Bank and its researchers with information and accountability in order to justify its investment. Researchers, in particular development economists, needed data to analyze "education-sector efficiency, as well as human capital formation and its determinants and consequences, but, remarkably, not to assess aid effectiveness" (Lockheed, 2013, p.169). Strategies implemented by the international organizations in developing countries to promote the countries involvement in assessments were: (1) the World Bank and UNESCO's training courses on assessment and testing and publications, (2) the inclusion of a testing component in the World Bank's education projects to obtain evidence of efficiency or effectiveness of the education system through measuring students' achievement, and (3) the experience of participating in cross-national assessments, such as the Laboratory of UNESCO (Lockheed, 2013).

National assessments have significantly increased in low-income countries around the world, from 0% in the period of 1960-1989 to 64% in the period of 1990-1999. By 2009 47% of

The Peruvian case for students' national assessments (1995-2015)

Latin American and Caribbean countries participated in international assessments, 53% in regional assessments, and 73,5% conducted national assessments (Kamens, 2013). The participation of developing countries in international assessments may have impacted in some way on their knowledge of the human capital, and in investment (as the percentage of the gross domestic product), regulatory (as curriculum) and behavioral (as teachers training) policies. Capacity building for assessments is an explicit purpose of international organizations. The participation in international assessments illustrates to national teams, quality standards in measurement and testing, helping them to prepare technical reports, and strengthening their capacity for conducting national assessments (Lockheed, 2013). However, assessments as a tool is not only about technical aspects (sampling, validity, reliability) but also about other factors related to the purpose appropriateness of the assessments in particular contexts, such as who is tested, what is tested, when tests occurs, how and why a test takes place (Wagner, 2012).

The role of assessments has been questioned as being attached to the logic of a knowledge economy. In this economy education is a means for knowledge and skill development associated with economic growth, and labor for globalized markets. Consequently, teaching mathematics and science is related to technology and industry, as well as comparing student performance between countries, and tracking efficiency and quality of educational systems. The measurement of student performance as an indicator of quality has been promoted by international organizations, such as the OECD, the World Bank, and the Inter American Bank. These organizations have a common vision for better education in relation to productivity and economic development. Standardized tests of students' performance, such as PISA of the OECD have become salient, with an increasing number of participant countries (Carnoy, 2014).

The Peruvian case for students' national assessments (1995-2015)

Equally, Valverde (2014) criticizes the role of national and international agencies as radical advocates for policies focused on the educational outcomes assuming that the quality of educational outcomes are in relation to productivity and economic competition. But in addition, what Valverde (2014) is questioning is the relationship of these outcomes with education quality, its definition and operationalization. The discourse of successful educational systems comes about as a result of 1) the quality of outcomes policies, and 2) the quality of outcomes goals based on an international definition of quality. International tests, agencies and agreements such as Education for All and the Millennium Development Goals are international regimes fostering a culture of monitoring of what they have defined as quality through targets and cross-national standards. These regimes advocate for particular policies based on particular frameworks such as accountability or high stakes assessments. Furthermore, as Valverde (2014) states, there is no evidence that “pursuit of educational quality standards, of any kind, results in increased quality” (p. 584).

Nation-states have their own motivations to participate in cross-national assessments, having also the opportunity to mediate and advocate for contextualized policies to pursue education quality and equity. What is important to highlight is the need to have a contextualized agreement about education quality and the role of assessments and associated factors studies, and the relationship between quality and assessments. This agreement is a national imperative given that the pressures of global trends for assessment have to be contextualized according to the national priorities. An example of the search for a contextualized education quality can be found in the social justice approach.

A social justice approach to education quality

From a social justice approach quality education is context based, that is, quality education is determined by the interaction of three environments in specific contexts: policy environment, home and community environment, and school environment. The policy environment considers Ball's policymaking dimensions: economic, political, and discursive. These dimensions require a critical analysis of (1) the national economy in relation to the global economic demands and its impact in national inequalities, (2) the democratic participation and political interests and agendas in the decision-making process, and (3) the global, state and civil society discourses originated in different and even contradictory approaches to quality education. Home and community environment, according to this approach, are spaces that produce and reproduce structural and discursive inequalities, such as poor living conditions, child labor or gender discrimination. The school environment has to promote democratic participation, be safe, and foster pedagogies according to the contextual knowledge and material conditions (Vavrus & Bartlett, 2012). While education quality is a result of a balanced interaction of these three environments, according to Tikly and Barrett (2013), there are three principles that can be interpreted differently depending on each particular context that defines good quality education: inclusion, relevance and participation. Inclusion in order to contribute to the development of capabilities entails the access and successful completion of basic education, but also an adequate distribution of resources and the responsiveness of the curriculum and pedagogies to the contextual and individual needs. Relevance is in relation to the achievement of learning outcomes to foster sustainable behaviors in local and global economic, social, and natural contexts, including the development of individual critical thinking, analysis, communication, and harmonious coexistence. Participation is related to the process of setting educational goals and

The Peruvian case for students' national assessments (1995-2015)

education decision-making at the national, school, community and classroom levels.

Participation fosters public debate and dialogue, the consideration of the voice of the key stakeholders and their mutual accountability. Policy environment, home and community environment, and school environment dimensions provide a framework for a contextualized education quality opening up the possibility of a more articulated vision of quality. Quality may be the result of the articulation of social and educational policies at the national and subnational levels with mechanisms and resources for inclusion, relevance and participation that explicitly takes into account the ways of knowledge and situated logics of the people of these environments. Standardized assessments in this broader conceptualization of education quality turns out to be a tool for policymaking that has the potential to monitor students' learning as an indicator at a large-scale level. This indicator with other indicators from these environments and principles can better inform about quality.

Research in the area of global education policies, and in the field of comparative education studies has some theoretical and methodological implications, as we it will discuss in the next section.

Methodological implications: spaces, flows and knowledge

As Verger, et al. (2012) have pointed out in this globalized context (1) the unit of analysis of the nation

The Peruvian case for students' national assessments (1995-2015)

state is not a cohesive entity that makes the political decisions. Rather there are state institutions as well as non-state organizations and actors with their own agendas and role in the state decisions.

Robertson (2012) asserts that a new epistemological paradigm is needed to understand the global in education, and emphasizes the importance of understanding the concepts of global and local in a relational manner: “rather than see the global as operating in some stratosphere –up there- that we see them as *places* made up of a range of spatial relationships – some global, some local and so on” (p. 35). Larsen and Beech (2014), in the same vein, suggest the concept of space as “sets of relations between individuals and groups” (p. 192) and the “spatial theorizing” as a framework for analysis in the comparative and international education field, in order to overcome the binary understanding of space as global and place as local, highlighting their interconnection.

According to Larsen and Beech (2014), the understanding of space as territorial is frequently associated with the nation-state as the unit of analysis for the comparison of educational phenomena across and/or within places like countries or regions. This comparison assumes the homogeneity of countries, and the nation-state as container of society. Moreover, they affirm that there is an unfounded relationship between place and space from pre modern times to globalized times assumed by some globalization theorists. In pre modern times place was the bounded territory of social activity, indistinguishable from space, which subsequently in modern times has turned into separate categories ontologically different. Hence, on the one hand, place turned out to be the inside, the physical settings, the contiguous territories, fixed, stable, an object associated with the local; on the other hand, space is the outside, the abstract, borderless, unconfined associated with the global. This understanding of the global-local has lead to the

The Peruvian case for students' national assessments (1995-2015)

study of globalization as a hegemonic process affecting the nation-state institutions and the nation-state mediating these globalized forces, and assumed as the unit of analysis or "spatial basis of comparison" (p.198).

Accordingly, Larsen and Beech (2014) propose the relational idea of space as a theoretical tool related to "mobilities, movement, networks, flow, and flux" (p. 204) across territories rather as an object of study, meaning a container or a geographic place. This relational conceptualization of space as being socially produced explores the complex dynamics of networks where organizations and individuals are united while others are apart. It assumes that the global is locally produced, and that places can be simultaneously global and local. It is important to note that what becomes global has a local origin, for instance, John Dewey or Paulo Freire's ideas appeared in local contexts and then became global ideas circulating detached from their historic context, and subsequently these ideas are relocalized and resignified in other places (Larsen & Beech, 2014).

Spatial thinking is operationalized through the social network approach, a methodological proposal to "look more carefully at the connections and circulations, at the in-betweenness through which the global and the local (and the educational) are constructed and relate to each other, and at the productive capacity of such thinking" (Larsen & Beech, 2014, p. 209). It is worth noting the emphasis in the network for the analysis of the flow and mobility of educational discourses by focusing on the communication process. Networks not only transmit knowledge but they especially construct and shape this knowledge, challenging static conceptions of policy transfer, and the studies of policy borrowing privileging a territorial concept of space (Larsen & Beech, 2014).

The Peruvian case for students' national assessments (1995-2015)

The application of more relational concepts in the analysis of the Peruvian case contributes to (1) identify local and international players exchanging interests and discourses for assessments and measurement in social spaces, (2) identify networks where the educational knowledge about assessments is created, shaped, and reproduced, and (3) follow the process of contextualization of assessments according to national priorities and political-economical emphasis.

The conceptualization of policy, and in particular education policy, deserves special attention given the globalized dynamics with new spaces for discourses, knowledge and power circulation and production.

Appropriation of Policies and Discourses

Education policies express priorities and values in education. Policymaking has political, economic and ideological dimensions that are part of a social system, where each dimension is relatively autonomous, affecting each other, and may have contradictions within and between them (Ball, 1990). In the education policy analysis used by Ball (1990), political dimension refers to the modes of governance or politics of education; economic dimension refers to the funding and education for productivity, and ideological dimension accounts for the modes of understanding and discussing policy. In this analysis, drawing on Foucault, Ball (1990) considers the discourse as the theoretical strategy for the ideological dimension pointing out its relationship with power and knowledge. Power is inherent in knowledge and concretizes in discursive practices. Thus, discourse is “what can be said, and thought, but also about who can speak, when, where and with what authority” (p.17). Discourses are then related to social and institutional position, “meanings thus arise not from language but from institutional practices, from power

The Peruvian case for students' national assessments (1995-2015)

relations, from social position. Words and concepts change their meaning and their effects as they are deployed within different discourses” (p. 18). Thus, discourses exclude and include’ and, while various discourses coexist with their own meanings, as “instruments and effects of power” (p.18), they can be in opposition, struggling for predominance or resisting and blocking emergent discourses (Ball, 1990).

For Shore and Wright (1997) policy is an instrument of governance that has become salient in the organization of modern societies, and that is in relationship with global patterns of government. Policy is a tool to regulate as a top-down technical and action-oriented instrument for problem solving. Policy also categorizes and classifies individuals shaping the way they construct themselves. Thus, policy exerts power through existing structures with discourses and agencies configuring systems of governance that are changing the relationship between the individual and the society. This reconfiguration places the importance of the analysis of policy as a political and cultural phenomenon that has an inherent model of society, with a mode of governance influencing the conduct, thought and feelings of individuals to contribute to this social order. Policy as a political phenomenon exerts power from under a neutral face appearing in contemporary societies as an instrument for efficiency and effectiveness detached from its political discourse reconfigured through the language of science and expert knowledge.

From a sociocultural approach policy is theorized as a social practice of power that has cultural, contextual and political dimensions. This approach privileges the conceptualization of policy as two interrelated processes of policy formation and policy appropriation (not as mere implementation) underscoring the role of values, beliefs and identities. Policy formation refers to the official discourses as a way of governance and a symbolic expression of normative decision-making. Official policy is in constant negotiation and reorganization in the process of

The Peruvian case for students' national assessments (1995-2015)

implementation or appropriation in the contexts where it may be applied, interpreted or rejected. This appropriation is dynamic and never neutral in the way agents take elements of policy “incorporating these discursive and institutional resources into their own schemes of interests, motivation, and action. Appropriation is a kind of taking of policy and making it one's own” (Levinson & Sutton, 2001, p. 3). Therefore, this understanding of policy as a cultural practice underscores the agency and cultural meanings of social actors in both moments of the process of policy: formation and appropriation. For Levinson and Sutton (2001) the concept of practice accounts for the “situated logic of activities across a wide array of contexts” (p.3). This idea of practice refers to how individuals and groups “engage in situated behaviors that are both constrained and enabled by existing structures, but which allow the person to exercise agency in the emerging situation” (p.3).

Education policy analysis with this framework should not assume two independent levels of policy of government practice and everyday practice, but instead focus on the interrelationship of these processes and practices and their situated logics and meanings. Moreover, sociocultural policy analysis “must link the discursive practices of normative control in any local-level community or institution with the discursive practices comprising larger-scale structures of law and governance” (Levinson, Sutton & Winstead, 2009, p. 776).

Levinson, et al. (2009) highlight the “negotiation of meaning” in the social practices of policy formation of the “normative cultural production” and in the ways policy is appropriated (p. 779). Thus, both policy formation and appropriation are “kind of purposeful knowledge and meaning making” (p.780). An illustrative example of this negotiation of meanings is the implementation of an education reform in Mexico where the authorized fostered changes in pedagogical practices such as the emphasis in competencies development rather than mastery of

The Peruvian case for students' national assessments (1995-2015)

contents, group projects, and a school administration based on democratic relationships. In this process of appropriation, supervisors reproduced their own hierarchical styles while training the teachers. On the other hand, the teachers' practice was influenced by their own interpretation of the reform as well as by their personal, ideological and professional experience (Levinson, et al., 2009). These authors share the concept of policy as a social, cultural and political practice from a critical perspective; on the one hand a social practice producing authorized and normative discourse, and on the other hand, a social practice resignifying or transforming this discourse.

The meaning making process of local agents and the characteristics of their specific contexts have an impact on education policy appropriation and practice. Vavrus and Bartlett (2012) as a result of their work with teachers implementing innovative learner centered pedagogies in Tanzania have also pointed out how the ways of knowing of the teachers influence their pedagogies. Additionally, they explain how their ways of knowing are shaped by the cultural, economic, political, and social contexts where they teach. Thus, they argue that the "conditions of teaching ought to be more fully employed in making sense of epistemological diversity among educators about educational knowledge production and dissemination" (p.636). These scholars find that the ways of knowing of the teachers are shaped by these contexts as well as by their own ideas of knowledge production and dissemination. Therefore, the contextual factors for the implementation have also a key role in the teachers meaning making process or appropriation of the imported learner-centered and critical thinking pedagogy.

On the one hand, these findings problematize the idea of applying reforms or transfer of policies that have worked under different contextual and material conditions, showing that it could be a convergence of a common core of featured policies traveling around the planet but that the process of appropriation depends on particular local conditions shaping epistemologies

The Peruvian case for students' national assessments (1995-2015)

and practices. On the other hand, the findings also problematize the assumption of a common global way of knowledge diminishing the contextual, historical and personal influences at the local level of appropriation. This particular case illustrates the interaction between global educational ideas and reforms and the local epistemologies and material conditions in a social space that entails the negotiation of meanings, and knowledge production and dissemination. Thus, educational transfer and global trends for assessments need to be analyzed in specific contexts to understand (1) the motivations, agents, and epistemologies involved in the processes of appropriation and recontextualization, and (2) the discourses involved in the process of internalization as part of the national education system.

Educational Transfer: Origin, Recontextualization and Internalization

Educational transfer and circulation of policies, programs, and discourses in this global context have been extensively studied in the field of comparative education from various frameworks, and in the context of developed and developing countries.

Scholars have questioned the emphasis of the educational transfer research from a practice-oriented perspective, looking for the content of borrowing or for what has worked in other contexts as if transfer (borrowing or lending) is due to a technical or logical search for alternatives for improvement (Steiner-Khamsi 2004a; Phillips & Ochs, 2003). Instead from a research-oriented perspective, educational transfer studies are focused on the process, motivations and agents for transfer, as well as on the process of transfer and recontextualization.

Steiner-Khamsi (2009) analyses three assumptions of the practice-oriented perspective that may not lead to a meaningful and complete analysis of educational transfer: system learning, system transfer, and system equity. The analysis of educational transfer as a system of learning

The Peruvian case for students' national assessments (1995-2015)

from elsewhere with the purpose of finding a strategy or program to address a problem or need in the local context has the risk of leaving out of the analysis the politics of borrowing. The political motivations may not be explicit when looking through the system of learning lens that, for example, can help to explain why often ineffective policies in their original contexts are borrowed. The contested nature of introducing reforms motivates transfer with the purpose of legitimating a local policy or introducing a justification for selecting a particular policy, displacing other alternatives. Educational transfer research, as a system transfer analyzes the feasibility of transference and implementation of policies or models in other contexts disregarding the necessary recontextualization process and contextual factors where they are translated. Moreover, cultural factors, adaptations, indigenization can lead to translations that result in a local version that differs from the original version or the selective adaption of some of its aspects, according to the local context. Finally, educational transfer, as system equity from dominant countries, in particular from colonial countries, into dependent states assumes borrowing is a voluntary act rather than an imposition. This perspective dismisses the local process of resistance and transfer or lending, contributing to assimilation. For instance, colonial education can be seen as an act of equity rather than as a means for reproducing inequalities (p. 166).

Scholars studying educational transfer from a research-oriented perspective through the processes of lending (where foreign example originates) and borrowing (where foreign example is received) have analyzed the mechanisms and relationships between global trends and local contexts focused on the analysis of the agents, politics, motivations and the ways a policy has been implemented and evolved into local contexts (Steiner-Khamsi, 2004; Steiner-Khamsi & Waldow, 2012). Policy attraction studies as defined by Phillips (2000) have documented, for

The Peruvian case for students' national assessments (1995-2015)

example, the British interest in German education. They identify the features of the German education reforms in particular historical contexts that triggered the British policy attraction over a long period of two hundred years (19th and 20th centuries) illustrating how these features have been used in Britain to support or reject local changes. Phillips (2000) has pointed out some forces triggering the attraction for borrowing such as (1) the academic or scientific investigation of a particular situation or foreign example, (2) popular conceptions of the superiority of foreign proposals, (3) political endeavors looking for a foreign proposal as a different alternative to the local problematic situation, and (4) distorted evidence to point out or exaggerate local problems. The politics of borrowing generally entails a fragile, scrutinized or controversial local political context (or government) that needs to provide solutions, new concrete alternatives or discourses to an educational problem.

According to Phillips (2000), in comparative studies the “most obvious consequence of learning and understanding what is happening ‘elsewhere’ in education is that we might be persuaded of the advantages to be gained from copying successful practice as it is manifest in other countries” (p. 299), otherwise known as borrowing. For Phillips (2000) the emphasis is on the idea of a ‘lesson from elsewhere’ which can be a concrete successful experience or rhetoric appealing in a particular context at a particular time. Moreover, lessons learned from successful practice are not always the real motives for borrowing. Rather they can be justifications for political ‘advantages to be gained’ from borrowing. Borrowing is not copying. It “draws our attention to processes of local adaptation, modification, and resistance to global forces in education” (Steiner-Khamsi, 2004, p. 5) that scholars have explained by tracing the interests, understandings, and discourses of the different players and politics involved in local contexts.

The Peruvian case for students' national assessments (1995-2015)

The mechanisms for influencing national and subnational educational policies can be understood as mechanisms of direct or indirect lending implemented by international organizations or other international players. Verger, et al. (2012) drawing on Dale (1999) present five mechanisms of global influence: (1) Imposition, external actors conditioning credits to a policy acquisition, (2) Harmonization, countries agree on the implementation of common policies, (3) Dissemination, external actors persuaded and technically convinced on the implementation of a policy, (4) Standardization, the international community define and call for adherence to policies or standards, and (5) Installing interdependence, countries agree on achieving common goals to face problems that need international cooperation. Additionally, among the international players there are non-profit and for-profit organizations fostering the dissemination of education programs and products, and sometimes competing in the same context or for the same target group (governments, education authorities, local organizations). Steiner-Khamsi (2004b) provides three reasons for this type of lending promoted by international organizations. Firstly, these organizations have to demonstrate the impact of their proposals and their capacity to expand its scope, necessary to maintain their recognition and effectiveness. Secondly, the transfer of packaged programs or educational best practices from West to East or from North to South is supported by local educated actors relying on their capacity for adapting and implementing the innovations. Finally, programs are transferred to the local offices to be managed with efficiency standards, depending on international consultants who disseminate those programs and provide technical expertise.

It is important to note that these international mechanisms of influence do not necessarily lead to borrowing, for instance, for Phillips (2009) borrowing is a purposively and conscious process, and the foreign example is identifiable. These mechanisms can be part of the spectrum

The Peruvian case for students' national assessments (1995-2015)

of educational transfer in a continuum from imposed transfer (lending) at one end, to transfer introduced through influence as a voluntary borrowing due to salient educational figures or theories or the circulation of international ideas at the other end (Ochs & Phillips, 2004; Phillips, 2009). In this continuum of educational transfer, purposely borrowing is when “one country initiates interest in, or cross-national attraction to, foreign educational practices and policies” (Ochs & Phillips, 2004, p. 8) and it is located before the voluntary end.

Phillips and Ochs (2003) have gone beyond the policy attraction phase proposing a model of four stages for the analysis of policy borrowing, including the processes of cross-national attraction, decision, implementation and internalization or indigenization. This model displays the notion of policy borrowing as an active process, changing and developing over time, and in constant tension with the political context and the interests of local and external actors. According to Phillips and Ochs (2003) policy attraction is motivated by an internal situation that requires improvement or change (impulse); thus an external alternative or foreign model is searched for according to the national interests and needs (externalizing potential). Later on a decision is made in order to start the process of change. Decisions can be theoretical or practical reforms or strategies based on outcomes in another context. Decision-making can be made for a political necessity to have a solution (quick fix) or for reforms with political effects in the electorate (phony). Then the foreign model is implemented and adapted in the local context and, finally, the internalization/indigenization phase is when the foreign model or policy is incorporated into the education system of the borrower country. This model and its application will be discussed more comprehensively in chapter 3 in particular the case of the evolution of the Peruvian educational evaluation policies. However, it is important to underscore here the internalization phase of the foreign example into the education system as a process of

The Peruvian case for students' national assessments (1995-2015)

unpredictable recontextualization affected by “forces of context” of the national and international scenarios in each stage of the model (Phillips & Ochs, 2003, p 457). Moreover, the four stages of Phillips and Ochs' (2003) model are non-linear processes. In the process of recontextualization each stage of policy borrowing involves a constant negotiation of meanings, and is shaped by agent's epistemologies, economic and social conditions (Vavrus & Bartlett, 2012), and mobilizes discourses according to the political and economic interests and priorities.

Recontextualization can be problematic especially in developing countries due to material, political, cultural and scalar aspects (Verger, et al., 2012). Material aspects refer to the challenges of importing educational models from contexts with funding, regulations and technical expertise into context without these resources. There are many documented examples of this type of transfer, disregarding material conditions, (Spren, 2004; Vavrus & Bartlett, 2009) as borrowed or lent deliberately by policymakers or the World Bank, for example. As a result, models can be partially implemented or in a different educational level (higher or basic education) in the local context, thus producing different and non-comparable outcomes than in its original context. The political ideologies and interests of players and local institutions are key mediators of the recontextualization of imported models. This mediation implies for instance, the adaptation or resistance to the new models by the teacher's union or educational institutions. Cultural and historic background also propitiates the adoption or rejection of certain policies or global trends, such as privatization policies in education adopted in India but not equally accepted in some Latin American countries. Finally, the scalar challenges for recontextualization are related to policy appropriation when there is a disconnection between policy formation and policy appropriation. The disconnection may occur when the policy is perceived as an imposition by the implementers as a top-down decision; or it may be challenging for implementers when the

The Peruvian case for students' national assessments (1995-2015)

new policy is considerably different from the previous one creating a gap for their implementation (Verger, et al., 2012).

Spren's (2004) study of the evolution of Outcome-based education reform (OBE) in South Africa eloquently illustrates the politics as well as the processes of appropriation, recontextualization and internalization involved in policy borrowing. She has accounted for the complex process of the politics of borrowing as a leverage for educational change in South Africa in the post-apartheid period drawing upon Archer's (1984) model for policy formulation: external transaction, political manipulation, and internal initiative or ownership.

In the stage of external transaction in the context of apartheid-resistance, policy formulation used external or international references of reforms or models to legitimize the OBE initiative as a credible alternative proven elsewhere. It is important to note, according to Spren (2004), that borrowing in this period did not necessarily apply to borrowing a concept or model from abroad but to use external or international discourses or vague references to justify an existing contested initiative. Subsequently, in the political manipulation stage of policy formulation in a post-apartheid state emerging into the international scenario, borrowed policies and external rhetoric were alternatives from the new government to consolidate its power in a global economy as well as to having inclusive proposals. The OBE, consequently, was revised to incorporate an economic discourse at the national level, and also made references to equity at the classroom level. Finally, in the stage of internal initiative, a sense of ownership of policies or reforms is necessary. References to discourses of global demands and competitiveness, as well as to local demands provide ownership and legitimacy to reforms. The implementation of OBE was questioned in this stage for its appropriateness in an unequal context with low-level teachers, and also because of its borrowed origin. Interestingly, criticisms of OBE's external references were

The Peruvian case for students' national assessments (1995-2015)

also used to modify its implementation resulting in an “amalgam of international ideas and a truly hybrid version of homegrown South African OBE” (Spreen, 2004, p.110), that ultimately, led to the disappearance of its external origin.

This historical process of policy borrowing moved from a specific need for an international referenced initiative that could be just a discourse to justify a particular reform. Later on, the foreign reform is used with political intention to gain international recognition and credibility. Finally, during the implementation when deficiencies of the foreign reform appear the process of appropriation or internalization led to a local version discarding its international origin.

It is worth applying the concepts of policy formation, policy appropriation and the meaning making process from the previous section into the case of OBE in South Africa. This case illustrates how in the tension between the reforms that circulate in the global landscape and the local political conjuncture entail a negotiation of meanings (and interests) at the level of policy formation and policy appropriation (Levinson & Sutton 2001). Policy as a social practice has situated logics, meanings and knowledge. Firstly, through the use of references in the process of policy formation the key antiapartheid stakeholders lever the discourse for a change. Secondly, the logic and practice of a new government positioning itself through a foreign model, led to policy formation and appropriation by negotiating meanings to navigate between pressures within the country and external challenges. The appropriation in this stage entails a recontextualization of the foreign model. Thirdly, policy appropriation is in a negotiation of meanings at a more concrete level of implementation legitimizing the foreign model. The recontextualization of the model led to its internalization as a hybrid local model.

The Peruvian case for students' national assessments (1995-2015)

National and international agents involved in borrowing and lending may interplay with different agendas where politics are strongly involved and where the references for borrowing may not be explicit (Vavrus, 2004). The concept of reference from elsewhere has been conceptualized as an externalization by Schriewer (1990). Externalization is the use of references to real (reforms or models) or imaginary (international community) as sources of authority to justify contentious policies (Steiner-Khamsi, 2004b). Externalization involves “the discursive interpretation of international phenomena for issues of educational policy or ideological legitimizations” (Schriewer & Martinez, 2004). Externalization frames borrowing, especially in times of political change, thus references to globalization can be used to pressure reforms in specific contexts, as well as to reference societies (individual nation as a model) and international points of reference (international organizations or studies such as PISA). National and international references are interconnected influencing and reinforcing each other (Waldow, 2012). Externalization is not borrowing, rather it is “a discursive formation that can become relevant in the context of borrowing, and lends itself easily to the purpose of producing legitimacy” (Waldow, 2012, p. 418). As Waldow (2012) exemplifies, an educational reform can be legitimized as evidence-based (externalized to principles of science), or in alignment with some values (externalized to values).

Using the same logic of legitimization, externalization to another subsystem can occur. For instance, the incorporation of market principles and terms from the economic sector into the education subsystem is understood as borrowing from another subsystem or cross-sectoral transfer (Waldow, 2012). As a type of transfer, the sector logic of the economic sector is translated and recontextualized into the education sector logic, where the encounter of logics may produce contradictions and transformations in particular contexts (Steiner-Khamsi, 2012).

The Peruvian case for students' national assessments (1995-2015)

Lets pass to the next chapter in order to analyze the process of transfer and appropriation of national assessments in Peru.

Chapter 3: Analysis of the Peruvian case 1990 – 2015

An analysis using the Policy Attraction to Internalization model

Phillips and Ochs (2003) use the term borrowing “to cover the whole range of issues relating to how the foreign example is used by policy makers at all stages of the processes of initiating and implementing educational change” (p. 451) and propose a model to illustrate the policy borrowing process. This model provides a sequence of four consecutive stages: (1) cross-national attraction, (2) decision, (3) implementation, and (4) internalization or indigenization. These stages are circular and suggest the idea of process, active local actors, and context. According to this model, the cross-national stage encompasses the impulses or motivation for borrowing as well as the externalizing potential or the identification of what can be borrowed from elsewhere. Impulses for borrowing, as others have also pointed out (Spren, 2004; Steiner-Khamsi, 2012), are generally triggered by an internal dissatisfaction or a national problem, including real or cynical motivations of political actors. The decision phase of the model consists of the measures for starting a change. Decisions can be based on theoretical, practical models, on foreign ideas appealing to the electorate, or on foreign models in order to offer a quick solution to a national problem. It is important to note that decisions for borrowing can be made regardless of economic, social or cultural characteristics of the target implementation place. Therefore, the implementation or the adaption of the borrowed model into the local context depends on contextual factors and on the support of individuals and institutions, such as material, political, cultural and scalar aspects (Verger, et al., 2012). Finally, the internalization process is the stage when “the policy is contextualized and ‘becomes’ part of the system of education of the borrower country, and it is possible to assess its effects on the pre-existing arrangements in education and their modus operandi” (Phillips & Ochs, 2003, p. 456). The internalization process

The Peruvian case for students' national assessments (1995-2015)

is complex, and evolves according to the attitudes of stakeholders towards the change and the contextual factors. For instance, as Spreen (2004) has emphasized, internalization can entail a more concrete level of borrowing when during the implementation phase reforms are scrutinized by local players, and ultimately internalization can only occur when the international origin has vanished.

For Phillips and Ochs (2004) policy borrowing is purposive because it has the explicit intention of adopting what has been observed in another place and implies an identifiable influence from elsewhere. Their emphasis in the purposive character of borrowing discards an imposed policy as borrowing; however, it opens up debates in regard to the purposiveness of direct or indirect influences through the circulation of international ideas, agreements, good practices or evidence-based policies (Schriewer, 2003). In addition, as Waldow (2012) has pointed out, borrowing and lending takes place in several different formats and it is not easy to establish boundaries between them; for instance, it is not easy to clearly identify the actors involved or if it is a voluntary process. Other examples are the inaction as being a way of preventing negative situations as seen elsewhere, or the use of references to elsewhere that do not involve any real transfer of content (p. 411). Education in a global scenario is susceptible to influences in context with an increasing flow of ideas and interconnectedness but despite issues of influence, for Phillips and Ochs (2004) borrowing entails an explicit intention “to adopt a way of doing things observed elsewhere” (p.776).

This model will be utilized for the analysis of the evolution of the Peruvian standardized educational assessment initiatives in the last 20 years (1995-2015). In Phillips and Ochs (2004) words “models seek to provide a concrete representation of processes described in the abstract. They serve as structures to facilitate analysis and discussion and to elucidate temporal and other

The Peruvian case for students' national assessments (1995-2015)

relationships” (p. 781). These scholars acknowledge that their model can seem immutable and may prevent its use for the analysis of complex situations under the appearance of being a constrained framework. They also acknowledge that their model is preliminary and can change with its application in different contexts. Therefore, with these considerations the model will be applied to the Peruvian case.

Several reasons support the decision of using this particular model for the purpose of the analysis of the Peruvian case, despite its criticisms and its methodological challenges (see Ochs, 2006; Phillips & Ochs, 2004). Firstly, the model has an approach towards policy transfer that provides a sequence of stages that entails a process, an unpredictable evolution and development of the foreign example according to the characteristics of a particular context. The relationship between stages is not causal but temporal. Therefore, this sequence is not fixed, and could be recursive along a variable period of time allowing the analysis of a policy borrowing process that is not linear. For Phillips and Ochs (2004) the processes described by the model are circular (model full-circle) given that the implementation and internalization processes will lead to a new situation (or configuration) requiring further changes, so another cycle may start again.

It could be argued that the idea of circularity suggests that (1) the four stages have to happen as a cycle so another whole process can start again, and (2) the new configuration will appear after the four stages are completed. However, in each stage there can be tensions, backward and forward movements, and contradictions introducing other emphasis in the political or technical discourses even at the decision stage as a result of the negotiation of meanings in the policy formation and appropriation (Levinson, Sutton & Winstead, 2009). As Ball (1990) pointed out, economic, political and ideological dimensions of policymaking are in constant

The Peruvian case for students' national assessments (1995-2015)

tension, hence shaping the flow and the direction of the foreign example while it is contextualized and recontextualized as part of the same cycle.

The model even though dynamic and context-based, comprises of a structure, a logic of sequential stages that are useful to trace and illustrate the transformations and contradictions of discourses and decisions within each stage and in the whole process of the model. However, Ochs (2006) has pointed out as a weakness of the model that it is not clearly defined when a stage begins and another ends, as well as that it could be a “reverse direction, where a later phase of the borrowing process could be a catalyst for cross-national attraction” (p. 612). Within the same cycle the stages can overlap, for instance, the decision and the implementation stages, as well as the implementation and the internalization stages.

Secondly, contextual factors and the processes of contextualization and recontextualization are central in this model providing a dynamic and agentic vision of the appropriation of the foreign example. This makes possible the consideration of epistemologies and understandings of organizations and players involved in the policy transfer (borrowing or lending) and its recontextualization as a result of the negotiation of meanings at different levels (international-national, national-subnational). Each stage is essentially defined (meaning, purpose and mechanisms) in the model, but ultimately its content is locally defined through specific interactions, motivations, players, and circumstances of the borrowing case of study. In this vein, Phillips and Ochs (2003) mention contextual forces and contextual interaction affecting the different stages of the borrowing process, as well as some of the filters “through which the perceptions of practice pass and become transformed” (Ochs, 2006, p. 610) such as interpretation, transmission and reception. Interpretation refers to how the educational phenomenon is understood by individuals and organizations. Transmission refers to how the

The Peruvian case for students' national assessments (1995-2015)

agents understand the foreign example according their own agenda and expectations. Reception refers to the acceptance, misunderstanding, or scrutiny, as well as the implementation of the foreign example. In addition, Ochs (2006) drawing on Dolowitz and Marsch (2000) suggest the analysis of the political actors involved in the transfer process such as “elected officials, political parties, bureaucrats/civil servants, pressure groups, policy entrepreneurs and experts, trans-national corporations, think tanks, supra-national governmental and non-governmental institutions and consultants” (p. 611).

Finally, as a model of policy transfer it contains an inherent tension between the foreign example (idea, discourse, reform) and its advocates, and the local political and economical aspirations, needs, and filters. This tension is represented in Peru by the discourse of global organizations, their knowledge and economic power and by the local political, economical and educational policy and decision-making actors, initiatives and discourses. This tension between levels with the participation of players and organizations of the international, national and subnational levels, shape spaces where these filters interact in networks fostering the flow of discourses, knowledge, and power (Larsen & Beech, 2014). Although this model can be used in the analysis of any level of borrowing (institutional, local, regional, or national) Phillips and Ochs (2004) recommends it being focused in the highest levels of policymaking.

The analysis of the Peruvian case uses the model as a structure for the recursive process of borrowing, contextualization, recontextualization, and expansion of the idea of educational assessments interacting in spaces with political, economical and educational discourses and policymaking.

The context in Peru in the early 1990s

The Peruvian government 1990-1995 started with critical economic, political and social challenges. In 1986 the decision of the previous government (1985-1990) to reduce to 10% the amount of exports for foreign debt-repayment to a group of international banks resulted in Peru being announced as an ineligible borrower by the International Monetary Fund. The same previous government's inability to control inflation and to foster exportations left the country with an economic hyperinflation in 1990 (Stokes, 1996), as well as the presence of terrorist groups that were increasingly threatening the political and social stability.

The newly elected government committed to reinserting the country into the world financial system applied in 1990 a set of neoliberal and drastic macroeconomic measures and structural reforms in order to reactivate the economy. The reinsertion process implicated the involvement of multilateral agencies, especially from the International Monetary Fund, in the economic policy decisions to ensure the continuity of the structural and sectorial adjustment (Campodónico, 1996). Therefore, nearly the total amount of loans from the Inter American Development Bank in 1991 and from the World Bank in 1993 were mainly destined to implement structural macroeconomic policies focused on neoliberal principles of supply and demand of the market and required a reduced role of the state in alignment with the Washington Consensus (Campodónico, 1996, 1999). Paradoxically, President Fujimori implemented the drastic adjustment measures that he criticized in the proposal of his contender during the political campaign, blaming the former government for the highly critical and unexpected economic situation to justify his decisions. This situation created an environment of bewilderment and distrust in the population (Stokes, 1996).

The Peruvian case for students' national assessments (1995-2015)

The neoliberal reforms implemented in the early 1990s in Peru as well as in other Latin American countries were focused on structural adjustments such as the liberalization and deregulation of the markets (financial, land, pension system) as well as the withdrawal of the state of all business activities, proceeding to privatization of public enterprises in order to tackle macroeconomic problems (Campodónico, 1999). The assumption of these reforms in the 1980s was that the benefits of neoliberal reforms that were initially concentrated in the wealthier sector gradually through market rules were going to expand to the middle and poor economic sectors. Therefore, the painful macroeconomic adjustment period would lead to economic growth and poverty alleviation. However, these reforms did not demonstrate a positive impact in poverty alleviation or inequality improvement in Peru as well as in other countries. Thus in the 1990s additional investments in the social sector such as the access of the population to health and education services, and compensatory programs for poverty alleviation were included by the World Bank in the adjustment program (Campodónico, 1999). In the educational context, the expenditure per pupil decreased substantially between 1970 and 1990 and it was a reduction of teacher's salaries that financed the expansion of the primary, secondary and post secondary enrollments (Benavides, Carnoy, Cueto & Gove, 2007).

President Fujimori dissolved the Congress in 1992 with military backup violating the Constitution by arguing a lack of support from the Congress to his antiterrorist program. In this same year the leader of the *Sendero Luminoso* (The Shining Path), the most extensive terrorist group was captured. The Peruvian government received international pressure calling for Congress elections that ultimately gave Fujimori's party a majority, allowing the President to change the national Constitution in order to run for election in a second period in 1995 (Benavides, et al., 2007).

The Peruvian case for students' national assessments (1995-2015)

After focusing on the structural adjustments in 1994 Peru received loans from the World Bank for education, health, infrastructure and poverty alleviation (Campodónico, 1999). Previously between 1992 and 1994 the Peruvian government negotiated a considerable loan for primary education with the World Bank (\$146.4 million). As part of the negotiation the Ministry of Education commissioned the General Peruvian Education Diagnosis that was conducted with the support of the World Bank and other international agencies. In 1993 this Diagnosis pointed out problems such as the lack of a national education program, the insufficient investment in education, a rigid bureaucracy prioritizing the administrative work, the inadequacy of the curriculum for basic education, lack of adequate textbooks, and the lack of school infrastructure and furniture (Rivero, 2005).

The Diagnosis stressed the need to improve quality, equity, and efficiency of the education system and led to the creation in 1994 of the Primary Education Quality Program (MECEP, in Spanish) with a loan from the World Bank and national counterpart funds (\$152.2 million). MECEP focused on (1) improving quality of teaching and learning through the provision of instructional materials, teacher training, and curriculum reform, (2) the modernization of educational administration (management skills of principals, regional and local administrators, nation network system of information of schools and students, system of measuring students achievement), and (3) improving school infrastructure (Hunt, 2001). It is important to note that school infrastructure was given the greatest attention by the President Fujimori who gave priority to this component for political reasons, as a way to gain political popularity. Spending on construction increased significantly from 1.4 to 15 percent of total spending in 1990-1994 and decreased gradually to 8 percent by 1997. The independent group that evaluated the World Bank's assistance to Peru (1990-2005) has asserted that: "The bank

The Peruvian case for students' national assessments (1995-2015)

may have contributed indirectly to Fujimori's popularity in the 1990s by using, at the president's insistence, most of the Bank's loan for school construction (counterpart funds were used for teacher in-service training)" (Benavides, et al., 2007, p. 6).

Included in these reforms, and as part of the MECEP program, the Ministry of Education created in 1995 the Quality Measurement Unit (UMC). This technical office since its inception was in charge of the students' national assessments as a means to measure outcomes quality through students' achievement. The remainder of this chapter illustrates the evolution and expansion of the discourse and policy for national standardized assessments by applying Phillips and Ochs (2003) model of policy transfer.

Stage 1 - 1990-1995: Cross-National Attraction: Impulses and Externalizing Potential.

"Assessments and Measurement Lent in a Borrowed Package of Reforms"

According to Phillips and Ochs (2003) this first stage is characterized by the presence of an impulse and an externalizing potential. On the one hand, the impulse constitutes the stimuli or motives that trigger the cross-national attraction, generally an educational problem real or distorted for political reasons. On the other hand, the externalizing potential are those of the "foreign models which might solve existing or emerging or potential problems" and specific "aspects of educational policy elsewhere that might be borrowed" such as a philosophy, strategy, goal, process, technique or funding and administration (p.453). However, the model leaves open the possibility of including other motives for policy attraction from its application in other contexts.

The space: policies, players, and discourses. The concept of space refers to the network of social relationships where the national and international individuals and organizations interact,

The Peruvian case for students' national assessments (1995-2015)

influence each other, exert their power and produce educational knowledge (Larsen & Beech, 2014). These interactions within the same country (place) shape a space where the international, national, and subnational intention, interests, and discourses encounter each other.

There were several national and international players and discourses in the space of this first stage of the Peruvian policy transfer case. Firstly, the new Peruvian government had been facing economic problems such as hyperinflation and having been declared as untrustworthy by the international lenders for receiving loans. It was facing political and social problems such as the presence of terrorist groups, and high levels of poverty and unemployment. President Fujimori, the leader of this new government showed in the early years of his period an inclination for dictatorship decisions such as the closing of Congress, and fostering changes in the national Constitution to ensure his reelection. In addition, he had no hesitations in applying structural adjustment measures against the stance of his previous campaign's offerings and to prioritize the investment in educational infrastructure with funds of the World Bank's loan to gain popularity for his reelection. The discourse of the new government for the international and national audiences was focused on the political and economic stability, and the need for improvement of the social sectors, but it also had a particular agenda as to ensure the president's reelection. At the same time, the educational discourse for quality improvement was based on facts informed by the Educational Diagnosis of 1993 but it was subordinated to the president's political interest, as Rivero (2005) puts it:

The investment in the recovery and expansion of the educational infrastructure replaced the option to introduce substantial reforms in the management sector. The predominant motto of building 'one school per day', as well as the inauguration of classrooms and schools fitted perfectly with the electoral strives for the reelection of Fujimori. (p. 202)

The Peruvian case for students' national assessments (1995-2015)

In addition, the president had a questionable democratic discourse with the population undervaluing democratic institutions and the need to provide transparent information.

Secondly, the International Monetary Fund and the World Bank advocated for the structural adjustment model, a particular economic model with questionable assumptions.

According to the World Bank (2002):

The Bank did help stabilize the economy, reintegrate Peru in the world financial community, and support a very effective structural reform process. The assistance program was dominated by structural adjustment loans. Subsequently, the main goals of Bank strategy laid out in 1993 and 1994 were poverty alleviation, infrastructure development, macroeconomic sustainability and institution building (...). (p. i)

The implementation of this model was a condition for loans destined initially to repay overdue debt to international banks and subsequently to invest in social sectors such as education, health as well as for the poverty alleviation that increased as a consequence of this economic model. The discourse of these international banks was to provide technical and economical assistance to Peru based on their expertise and framework. On the one hand, the International Monetary Fund and the World Bank's agenda was to help Peru in its reinsertion into the international economic scenario by repaying its debt and becoming a reliable borrower through the implementation of their model. On the other hand, the package of educational reforms that the World Bank funded in the MECEP program was very similar to reforms that they financed elsewhere in Latin America. This response from a financing agency is similar to those of other Latin American countries (Rivero, 2005).

In the specific reforms included in the MECEP program relating to the modernization of the education, were included the statistics and students achievement systems. These systems

The Peruvian case for students' national assessments (1995-2015)

were assumed by the World Bank as necessary for policymaking in order to improve quality of education: “Three broad types of data measures are required for this task: (a) statistical and other data on inputs, outputs, processes, and costs, (b) information on the systems' output as measured by student assessment, and (c) research on the relationships between inputs, processes, costs and outputs” (Wolff, Schiefelbein, & Valenzuela, 1994, p.109). Therefore the UMC was created in order to be a supportive organ for policymaking decisions in the top management of the Ministry of Education to provide information about the outcomes of the educational system as an indicator of quality.

Thirdly, the Ministry of Education is a player that tried to link the design of the MECEP program with the implementation of reforms for primary education to tackle problems that the General Diagnosis of the Peruvian Education of 1993 pointed out. The need for improvement in the quality of teaching and learning, the management and administration skills, the educational data system, and infrastructure were undeniable. However, the required strategies to address these problems did not receive enough attention from the presidential entourage (Rivero, 2005). Instead, the discourse for quality improvement was framed and operationalized by the World Bank's package of reforms and rationale as well as by the presidential priorities for showing concrete actions to the population. In this package of reforms there was included the new “idea” of measuring educational quality outcomes. Some of these reforms and new ideas were in tension with the required technical expertise and training of the personnel in charge of their implementation in the different areas of the Ministry of Education. In particular, the students' achievement measurement required the creation of the UMC in the Ministry of Education in order to technically design and implement the students' national standardized assessments for the first time in Peru. The discourse of the reforms for quality improvement, quality measurement

The Peruvian case for students' national assessments (1995-2015)

and the necessity of technical work and accomplishment of the benchmarks agreed with the World Bank were salient in the Ministry of Education in this period.

Finally, in 1990s, international organizations such as UNESCO and the OECD were advocating for the necessity of measuring education quality through learning outputs of the educational systems of the nation states. The World Conference on Education for All (1990) agreed on the importance of achieving learning and stated in the World Declaration on Education for All the following main activities to assess this goal and contribute to policymaking:

“necessary to define acceptable levels of learning acquisition for educational programmes and to improve and apply systems of assessing learning achievement” (UNESCO, 1994. p. 5). As a result, the Framework for Action called for international funding to help countries reach their goals. What was new in this World Declaration was the relevance of learning as an education output and the need to assess this output, rather than only focusing on the inputs that had been the economists' common practice (Lockheed, 1996). At the same time, in 1990, economically developed member-states of the OECD agreed to having standardized assessments in their process for monitoring quality to ensure a skilled workforce, to audit learning outcomes and quality control, to systematically monitor educational progress, and to terminate school failure (OECD, 1995). In Latin America in the Regional Office for Education in Latin America and the Caribbean of UNESCO (UNESCO, 2001b) created in 1994 the Latin American Laboratory for Assessment of the Quality of Education (LLECE) with funds from the 13 participating countries, the UNESCO, the World Bank, the Inter American Development Bank (IDB), the Ford Foundation and the Andrés Bello Agreement (UNESCO, 2001b).

In this process of borrowing and lending, the national problems and interests in tension with the international requirements for economic growth and global trends for measuring

The Peruvian case for students' national assessments (1995-2015)

education quality and learning outputs shaped a space. In this space players and discourses pursued an agenda with shared as well as individual goals. The flow of discourses and interests in this space analyzed through the lens of Phillips and Ochs model (2003) had an impulse for policy borrowing in Peru in its education problems regarding quality, equity and efficiency (as other countries of Latin America) in the 1990s. On the one hand, the internal context of political instability and the international pressure for economic and educational improvement became 'impulses' or the motives for change that boosted the international attraction. In this case, the Peruvian government appealed to the World Bank for funding, but also accepted a package of reforms in order to improve the educational system, and to create favorable conditions for the President's reelection. Therefore, according to Phillips and Ochs (2003) the motives for borrowing were in this case a mix of "economic change/competition; political change and other imperatives; [...] globalizing tendencies" also involving "cynical exploitation of real or contrived weaknesses" (p. 452). On the other hand, the strategies, processes and techniques of the scope of the World Bank's funded program constituted the 'externalizing potential' that was going to help the government in facing its education, economic and social problems and its political interests. MECEP was created to concretize, contextualize and recontextualize the lent and borrowed inputs. Although MECEP was created after an education diagnosis that identified problems of quality, equity and efficiency, the components of this particular program for primary education was part of a package of similar reforms that the World Bank lent to various countries as loans for education (Beech, 2011).

Therefore, Peru has purposively borrowed money, reforms, and technical assistance, not only as a means to improve quality and equity, but also to satisfy its political interest. The World Bank lent money, reforms, technical assistance and a vision for development through a set of

The Peruvian case for students' national assessments (1995-2015)

inputs to improve the education system. Included in this set of inputs the World Bank also instigated initiatives such as the assessment for measuring quality, thus lending an “idea” (assessments as a measure of education quality outcomes), a “bureau” (the UMC), which is the official area within the Ministry of Education to develop this idea. Therefore, the World Bank involved the recipient country in a trend for measuring and monitoring for national improvement in alignment to the claims of the international organizations (PREAL, 1998; UNESCO, 2001a; World Bank, 1999).

This first stage of cross-national policy attraction of the Peruvian case overlaps with the second stage of decision within the space where international and national discourses are interconnected. The political interest of the Peruvian government as well as the political interest of the International Monetary Bank and the World Bank had an economic focus which was the ‘attraction’ for borrowing and lending. The particular political interest of each player can be considered a ‘policy attraction’ and at the same time a ‘decision’ for borrowing and lending. The package of reforms for education was part of a set of reforms for other social sectors and all these reforms were a means to concretize these players’ political interests, and a vision of development. In the particular case of education, it could be argued that the negotiation and agreement of the MECEP program could be considered part of the decision stage, given that it implies a decision for starting a change. However, it has been included in this first stage because this package of reforms was inseparable from the loans. The decision to be made by the borrower was not about ‘what’ to be done or in which areas because these reforms contained their vision of development, target population, and quantifiable goals. For example, a curriculum based on competencies and that fosters an active pedagogy rather than focusing on contents and lectures. What the education sector in Peru had to decide on was ‘how’ to implement these reforms. For

The Peruvian case for students' national assessments (1995-2015)

example, to hire professional teams, the administration of the resources, specific technical designs of textbooks and assessments, and the articulation of these reforms towards a quality education. Therefore, the decisions of the next stage are in regards to 'how to start implementing' the measures for change, in other words, how to start the MECEP program, although we will find differences in the degree of decisions involved and an overlapping with the implementation stage between the quality component inputs and the assessment system.

Stage 2 – 1996-2000: Decision. “Technical And Political Mismatch”

The second stage of Phillips and Ochs' model (2003) is the decision-making process that consists of “a wide variety of measures through which government and other agencies attempt to start the process of change”. Decisions can be “theoretical, realistic or practical, quick fix or phoney” (p. 453). The decisions can be ideas or theoretical positions regarding an education problem. They can also be practical isolated strategies or approaches from elsewhere. Other decisions are reforms or ideas that politicians find appealing to the electorate (phoney) or the implementation of foreign reforms as a “quick fix” which is what Phillips and Ochs (2004) call “the most dangerous form of decision-making” (p. 780) for political necessity.

In this research paper the decision stage is in relation to the implementation of the agreed loan from the World Bank for education through the MECEP program in general, and in particular, to the implementation of the national assessments for measure students' achievement. This implementation had attached a discourse for assessment as a quality monitoring system. Therefore, according to the second stage of the model, the decisions are the administrative arrangements, technical and political measures to start the MECEP program in order to implement the lent and borrowed approach to quality education (through inputs as the

The Peruvian case for students' national assessments (1995-2015)

curriculum, textbooks, teachers, administrators and principals training), the information and assessment systems, and the infrastructure program.

Decisions of the specific measures for change about the quality component are based on a pedagogical approach that can be considered lent from the World Bank. This approach was supported by realistic/practical outcomes from educational reforms implemented by the Bank elsewhere regardless of contextual differences. The information and assessment systems can be considered instrumental as a means to report and measure the outcomes of the educational system, and the infrastructure program instrumental to political interests. The decisions of the implementation of the infrastructure component can be understood as a phoney intention appealing to the electorate.

The space: policies, players, and discourses. In this period from 1996 to 2000 national and international players and institutions constituted a space where the early discourse for assessment had to be technically and politically constructed in Peru, and in this initial phase to analyze this new discourse as part of the set of reforms of the MECEP. President Fujimori was reelected for a second period 1995-2000, the economic measures of his previous government helped to recover the economy even though they did not increase employment or salary in the lower strata (Stokes, 1996). In addition, the emphasis on school construction or reparation made a great impact on the population as means to improving their lives (Benavides, et al., 2007).

The Peruvian government was urged to start the MECEP program for primary education with funds of the World Bank in 1995, probably because the presidential elections were forthcoming early in that year. However, the quality component to be implemented with national counterpart funds did not receive enough economic or administrative support for its successful

The Peruvian case for students' national assessments (1995-2015)

implementation. Despite these difficulties the MECEP program for primary education started in 1996 and ended in 2001 (Hunt, 2001).

The Ministry of Education was focused on the measures to start the MECEP program, which included the administrative and organic institutional organization and technical designs of the three components of the MECEP program for primary education: quality of teaching and learning, infrastructure and, modernization of the administration at national and subnational levels. Various offices within the Ministry of Education started the implementation of the reforms of MECEP and were not exempt of problems and challenges.

The quality component included a new curriculum approach for primary education based on competencies rather than on contents, promoting the student's active participation, critical thinking and problem solving skills. This approach was also to be included in the students' textbooks and guides for teachers as well as in the national program for teachers training in teaching methodology, the adequate use of the instructional time, textbooks and curriculum. This training was implemented by the selected teams of universities, pedagogy institutes (education colleges) and NGO all over the country as an initiative of the Ministry of Education (Hunt, 2001). The approach for the quality component of the package of reforms lent by the World Bank had to be recontextualized into the curriculum, materials and training by the national team.

Through the infrastructure component many schools were built or repaired, also student's desks and tables distributed, as negotiated by the government. In addition, as included in the modernization of the education sector, principals of schools and subnational administrators were trained; the information and statistic system was initiated as well as the national assessments (Hunt, 2001).

The Peruvian case for students' national assessments (1995-2015)

It is important to note that the quality components and the infrastructure program in this period of MECEP from 1996 to 2001 clearly passed from the decision stage to the implementation stage of the model. Decisions in regard to starting the MECEP program constituted the measures for starting the change or reform, these were done while implementing them. These measures required certain conditions to start the work, such as the administrative and organizational measures (institutional conditions), as well as the recontextualization of the novel approach for the curriculum, students' textbooks, and teacher training.

I argue, however, that the students' achievement measurement system was still in the decision period due to two levels in the borrowing process, as will be explained below. As mentioned before, the idea of measurement of students' achievement had to be operationalized by the UMC and it was borrowed attached to a vision and discourse of learning as an output of the education system and an indicator of quality. This idea of measuring through standardized assessments was a global discourse that was borrowed detached from a specific technical framework and methodology of evaluation. Consequently, the UMC had to make decisions about the measures to start this task.

In this period the UMC received technical assistance from national institutions and international experts and scholars in order to develop reliable and technically rigorous large-scale assessments (Cueto, 2007; Arregui, Cueto, & Rodríguez, 2008). In this context the UMC designed the mathematics and language tests, the associated factors surveys, and the statistical model for the analysis of the assessments.

The first two national assessments evaluated samples of students in mathematics and language from fourth grade primary in 1996; and, in 1998 both fourth and sixth grades in primary, and fourth and sixth grades of secondary (Ministerio de Educación [MED], 2002).

The Peruvian case for students' national assessments (1995-2015)

These assessments were norm-referenced and according to this design they reported mean scores of the evaluated samples. It was not part of the design to inform how students performed in relation to what was expected for a preset standard. A critical analysis of the early technical decisions of the UMC staff pointed out the lack of knowledge, experience and ultimately the lack of clarity of the role of the assessment in the reform package of MECEP. In Arregui, et al. (2008) words:

The main problem of the UMC at the moment of its foundation was that it did not have clear definitions of the purpose nor the use owing to a standardized assessment (even worse, there were errors in understanding of what the evaluation model would permit to be understood). Thus, since its inception and with the help of international consultants a norm-referenced model was established that was clearly inadequate because it did not allow a clear definition of the object of the evaluation nor permit having cut-off scores indicating the acceptable performances. (p.28)

In this decision stage of policy the UMC had to technically and politically contextualize the "idea" of the measurement of the standardized students' achievement system. The UMC had to give technical content to the "idea" by defining the framework for the assessment, including the model for statistical sampling and analysis. The staff knew that the task was to measure but this task or new "idea" was detached of a model or an explicit framework for the assessments to be recontextualized.

The UMC also had a political challenge under its responsibility attached to a vision of the role of education and measure of outputs as an indicator of quality. In this early phase of development it was not clear the scope and impact of its work: audiences, types of report and use of the information (Arregui, et al., 2008). It was a new technical and political idea in Peru but

The Peruvian case for students' national assessments (1995-2015)

initially in this decision stage the UMC was concentrated on solving the technical aspects in order to release the first assessment in 1996 and to elaborate the reports as agreed to with the World Bank.

The results of the national assessment 1996 were not fully understood by the top authorities of the Ministry of Education. The student's results were expressed with mean scores of around 50 percent of a normal curve and were equated with a disapproval score by these authorities. The norm-referenced model did not offer a scale to compare the results with, so clearly the interpretation of the educational authorities was incorrect. The consequence was that the Ministry of Education did not authorize the distribution of the reports assuming these bad results were as a consequence of the current government policies (Cueto, 2007). It was a demonstration of a lack of transparency (Rivero, 2005) as well as a contradiction between the technical responsibility of the UMC for evaluating and disseminating the results of the assessments and the political commitment for this dissemination (Arregui, et al., 2008).

In 1997 Peru participated in the First International Comparative Study in Language, Mathematics and Associated Factors of the Laboratory of UNESCO. A sample of students from third and fourth grades of primary was evaluated demonstrating a performance lagging behind the students of other Latin American countries. In 1998 the government did not allow UNESCO to release Peru's results of its participation in the Laboratory in the report published in 1998 (Unidad de Medición de la Calidad [UMC], 2001a; UNESCO, 2001b). One of the reasons for this decision was that the authorities considered that the results could be used to argue that the education management of the government was deficient, in UMC (2001a) words:

These authorities did not understand, or feared that the public would not understand, that the students' results did not exclusively depend on the management of a particular

The Peruvian case for students' national assessments (1995-2015)

government. The educational processes and their changes, especially the ones related to learning, are a result of long periods of activity. (p. 1)

The results of the Peruvian students of the national assessment 1996 and of the Latin American Laboratory of 1997 were released in 2001 (UNESCO, 2001b; Cueto, 2007; Benavides, et al., 2007) during the administration of the next government. The results of the national assessment 1998 were released in 2000 by the end of the government of Fujimori.

In the beginning of the new century global agreements such as the World Conference on Education for All reiterated priorities for national commitments towards quality improvement and measurement in accordance with Goal 6 of the framework: "Improving all aspects of the quality of education and ensuring excellence of all so that recognized and measurable learning outcomes are achieved by all, especially in literacy, numeracy and essential life skills" (UNESCO, 2000, p. 8).

In this space international organizations have played a key role stressing the importance for quality through reforms, standards, and measurements. In Latin America in the 1990s, countries were implementing similar economic and education reforms to improve quality and equity funded by organizations such as the International Monetary Fund, the Inter American Development Bank and the World Bank. Peru received loans from the Inter American Development Bank in 1997 for preschool education, and in 2001 for secondary education. Additionally in 1998 the government started conversations with the World Bank for a loan to implement a project to improve education in the rural areas and with this purpose a diagnosis financed by the Bank was done in 1999. This diagnosis indicated the low quality of education of the children of rural schools and low-income families underscoring the equity problems (Benavides, et al., 2007). By 1998 the gross domestic product increased in Latin American

The Peruvian case for students' national assessments (1995-2015)

countries, the inflation decreased and other macroeconomic indicators improved. However, in the same period poverty indicators as well as the more equal income distribution did not improve significantly (Campodónico, 1999).

It could be argued that despite the implementation of the first two national standardized assessments the process of borrowing was still in the stage of decision although in reality it did overlap with the implementation stage. The discourse for students' achievement measurement as an indicator of quality required, on the one hand, a contextualization given that it was borrowed detached from a specific evaluation model or framework (decision stage); on the other hand, this novel idea had to be operationalized through specific technical, administrative, and organizational processes (decision and implementation). Decisions and implementation of the first two national assessments were inseparable because the implementation operationalized and made visible the decisions of the UMC revealing (1) the UMC's lack of clarity of the appropriate technical procedures, type of reports and use of the information, and (2) the predominant political expectations for using the results to show progress as a result of the current government actions rather than as a means to improving the educational system. There was a mismatch between technical and political discourses, expectations and orientations.

This also reveals the existence of a new space where the new discourse towards measuring quality did not have a clear place and role. In this space the package of reforms was borrowed from international agencies and included in it was the conception (and discourse) of measurement and monitoring educational outputs on a large scale at national and international levels. This concept was lent and was included in the borrowed package. In the Peruvian case, decision and implementation were recursive processes necessary in the contextualization of the foreign idea.

The Peruvian case for students' national assessments (1995-2015)

Stage 3 – 2001-2005: Implementation. “Consolidation of the technical knowledge”

The third stage of the Phillips and Ochs (2003) transfer model is the implementation phase. In this stage a foreign model or reform is adapted to the characteristics of the local context. The implementation depends on the context of the borrower country and changes will occur in a period of time depending on how the reform is accepted or not accepted by key stakeholders or significant actors. The changes occur in a variable period of time with regards to the “adaptability of the policy measures” and the attitudes of the “significant actors” (p. 456).

Significant actors in these scholars' words:

might be bodies like local education authorities, school boards, or board of governors; or they might be individuals like chief education officers, advisers or head teachers. They might receive support in terms of national and local encouragement and financial incentive; or they might face blockage (inaction, delaying tactics, non-decision) on the part of those who can see ways to subvert what they regard as alien policy. (Phillips & Ochs, 2003, p. 456)

In Peru during this period 2001-2005 the evolution and implementation of students' assessment continued its contextualization process according to local educational and political priorities.

The space: policies, players, and discourses. The political context in Peru at the beginning of the new century was challenging. President Fujimori was elected for a third period (2000-2005). His reelection was questionable because of the change in the Constitution that allowed him to run for a new period, and furthermore, there were indications of fraud (Benavides, et al., 2007). A scandal of corruption forced President Fujimori to escape from the country and to resign from office while overseas in 2000. Meanwhile a transition government

The Peruvian case for students' national assessments (1995-2015)

was installed for 9 months and in July of 2001 a new democratic government started with President Toledo elected for the period 2001-2006.

MECEP had been implementing a reform since 1997 with funding from the Inter American Development Bank to improve the quality of preschool and secondary education (Guadalupe, 2001). In 2003 MECEP began the implementation of projects to improve the quality of education in rural primary schools, to expand access for rural children, and to reform teacher policy and education with a loan and technical support from the World Bank. The reformation of teacher policy and education included support for the Ministry of Education in order to design a new teacher career plan and an evaluation system, as well as the students' assessments conducted by the UMC (Benavides, et al., 2007).

The work of the UMC in this period had been focusing on the technical work redefining the model for the assessments and articulating its framework with the approach of the national curriculum and the teachers' training program implemented in the last five years (UMC, 2001b). This approach was based on a new paradigm of teaching and learning, so in this context, according to the UMC (2001b):

arises the need, understood by the Ministry of Education, that through the UMC to carry out periodic and systematic evaluations of the students' performance. Similarly, to analyze and report the results so that in the end the appropriate bodies make decisions on educational policy that, under technical criteria, could change or strengthen institutional aspects, and in particular, pedagogical aspects: curriculum, teacher training, educational materials, amongst others. Likewise, to provide teachers with information in order to establish mechanisms for improvement of the processes of teaching and learning. (p. 3)

The Peruvian case for students' national assessments (1995-2015)

Political and educational contexts shaped another space where the stage of implementation started with a recursive process of decisions to define the new model as well as of implementation of the national assessments with this new model. In this space for the UMC the approach of the quality component was a guidance to look for a design for the assessments, and the purposes and audiences of the assessments were explicit. The information from the results of the assessments was evidence-based for policymaking, including the school level in order to improve pedagogical and institutional aspects. The new "idea" was becoming clarified technically in its purpose and approach for the UMC, and politically in the decision of implementing and disseminating the results for the Ministry of Education. However, it is important to note the emphasis in the generation and dissemination of information with the assumption that information is a starting point for improvement, and those agents at different levels, such as subnational authorities, principals and teachers will link the information with the mechanisms for improvement (policies, strategies, practices).

In 2001 the professionals of the UMC were looking for different statistical models in order to report information about students' performance in a more meaningful way, in alignment to the defined purposes and audiences. Therefore staff at the UMC, after consultations with experts, international literature and educators, established performance levels and released the national assessment 2001 with a criterion-referenced model (UMC, 2002a).

Criterion-referenced assessment tells us how well students are performing on specific goals or standards rather than just telling how their performance compares to a norm group of students nationally or locally. In criterion-referenced assessments, it is possible that none, or all, of the examinees will reach a particular goal or performance standard. (CRESST, n. d.)

The Peruvian case for students' national assessments (1995-2015)

The national assessment 2001 evaluated a representative sample of student of fourth and sixth grades of primary and fourth grade of secondary in mathematics and language (Spanish).

It is worth mentioning that the national curriculum did not have standards, so the UMC had to establish performance standards based on the analysis of the national curriculum in order to create performance levels for the grades evaluated in the national assessment 2001(UMC, 2004c). This was a new process that involved teachers from public and private schools, and specialists of the subnational education offices from all over the country³ that participated in the technical workshops for setting the performance levels for the grades and subjects included in the assessment (UMC, 2002a).

The change from norm-referenced to criterion-referenced evaluation designs was fundamental for reporting students' performances indicating the percentage of students that reached a sufficient level as well as the percentages that were below this level, and especially for teachers to know how many students were learning what was expected in the curriculum according to their grade. The reports were instrumental to providing information that could be useful to policy and decision makers in the central offices of the Ministry of Education as well as by the sub national educational authorities from the regional governments that were in an incipient phase of decentralization led by the Educational National Council.

In this space during the implementation stage the discourse for measurement of students' performance was reinforced and expanded on through national and international players. The World Bank and the Inter American Development Bank were financing the UMC and including the national assessments in their programs as a means to obtain information about learning outputs. The Ministry of Education continued to implement the package of educational reforms with funds of the World Bank and the Inter American Development Bank for preschool, primary

³ 60 teachers and 100 specialists of all the subnational departments of the country (UMC, 2002a).

The Peruvian case for students' national assessments (1995-2015)

and secondary levels in urban and rural areas. The UMC was strengthening its technical capacity with the support of national and international consultants and started to disseminate a technical discourse about assessments and performance levels amongst policymakers, subnational specialists and teachers. Implicitly in this technical discourse the UMC was disseminating: (1) the concept of standards as necessary to define acceptable levels of learning (equated to the sufficient level), (2) assessments as a rigorous technical work, (3) a technical language and a procedure for defining performance levels, and (4) the idea of having information for decision making at national, subnational and school levels.

In 2001 Peru participated for the first time in PISA released by the OECD (UMC, 2002b) along with another 42 countries. This global assessment was not linked with any particular national curriculum; instead the OECD had identified transversal competencies that were expected of 15 year-old students for their successful incorporation into adult life in a globalized world. PISA measured skills for life through the domains of reading literacy, mathematical literacy and scientific literacy. The concept of skills for life was in alignment with the OECD countries members' concern about the development of human capital defined as the "knowledge, skills, competencies and other attributes embodied in individuals that are relevant to personal, social and economic well-being" (Organisation for Economic Co-operation and Development [OECD], 1999, p.12).

PISA turned out to be an attractive assessment for Peru primarily due to technical reasons. According to the UMC, firstly, it was an opportunity for Peru to make a connection between the Peruvian curriculum and the lifelong skills evaluated by PISA. Secondly, the PISA reports would provide information about student achievement in the standardized scale of each of the evaluated domains. Therefore, it was possible to know the level of tasks of each domain

The Peruvian case for students' national assessments (1995-2015)

that 15 year-old students could and could not solve and would complement the information from the performance of the students of fourth grade in secondary in the national assessment of 2001, given that both evaluations report their results with performance levels (criterion-referenced design). In effect, the UMC found in PISA an opportunity to learn technical issues to improve its evaluation system, an example of a tool for policy decision making, and an example of standardized performance level scales as necessary to describing student achievement regarding what is expected in each educational level (UMC, 2002b).

Motivations for the participation of developed and developing countries in a global assessment like PISA can be very different. Developed countries' participation in cross-national assessments is motivated by their own interest of comparing their education systems with other similar countries in order to improve them and to know about the inputs, processes and institutions impacting student's achievement (Lockheed, 2013). The motivation of developing countries has been instigated by 'others' such as donor agencies like the World Bank in order to improve their national assessments and to monitor and be accountable for the outputs of their education systems on a standardized scale based on PISA (Lockheed, 2013). Peru and other Latin American countries initially participated in the cross-national assessments in order to learn more about technical issues, to have better information and to improve their national testing systems (Valverde, 2014).

The results of the participation of Peru in PISA released in 2002 caused an alarming reaction in the media, the Ministry of Education and the Forum toward a National Agreement (Consejo Nacional de Educación [CNE], 2008). The performance in reading comprehension of the 15-year old students in PISA showed that less than 1% of students were in the top performance level, and that more than 50% of students were not able to solve the tasks of the

The Peruvian case for students' national assessments (1995-2015)

lowest level (UMC, 2004b). These results placed Peru at the very bottom of the ranking of 43 countries, and also corresponded with the low performance of the Peruvian students in the national assessment 2001. A scandalization process (Steiner-Khamsi, 2003) questioning the national education quality was raised in the media with particular emphasis to the position of Peru in the ranking of the PISA tests. Therefore, the President Toledo declared the education system in a state of emergency for the period 2003-2004 (Decreto Supremo of 2003; CNE, 2008).

Accordingly, the Ministry of Education launched the education emergency program against education failure with four components: (1) improve fundamental learning, starting with language (quality), (2) improve the learning conditions of the students of public schools, especially of the more socially and economically vulnerable (equity), (3) strengthen the management of the public schools with more autonomy, participation and efficiency (educational decentralization), and (4) national mobilization for reading, fundamental learning and values, promoting a culture of vigilance and co-responsibility (educational society) (MED, 2004, November 14).

In this implementation stage, the participation of Peru in PISA had some technical and political consequences. In the technical arena the criterion-referenced model acquired in the national assessment 2001 was reinforced and improved by the UMC due to its participation in a highly technical level cross-national assessment. The national team in the UMC has additional learning in regard to the framework of the assessment, statistic models for analysis, the inclusion of open-ended questions and rigorous correction procedures. In the political arena, the results of this assessment brought up the low results of the Peruvian students in an international ranking as it happened before with the results of the Laboratory of UNESCO assessment. The problem of

The Peruvian case for students' national assessments (1995-2015)

low results were equated with the low quality of education and triggered reactions in the message of the media, as well as in the discourse of certain national policies enacted by the government and in the measures of the Ministry of Education as a reaction to these results. It is important to note, however, that the measures included in the document pointed out actions related to quality, equity, decentralization and the role of the society indicating a holistic vision to improve education.

An important milestone in this current space is the enactment of the Peruvian General Education Act of 2003, which is an existing act governing the education sector. This act incorporated in the scenario important institutions, mechanisms and regulations, such as the formulation of the National Education Project as the main core of education policies, the creation of the National Education Council as the national representation of a diverse group of the civil society, and the creation of the National System for Accreditation, and Certification of the Quality of the Peruvian Education (SINEACE, in Spanish) for basic and higher education.

This act defined the quality of education as the “optimal level of formation that a person must reach to face the human development challenges, exercise their citizenship, and continue a lifelong learning” (Ley General de Educación of 2003). In addition, it identifies the factors impacting this quality, establishes measures for reaching equity, promoted a decentralized management of the national education system, and the participation of the civil society through the education councils at the school, community, regional and national levels (Ley General de Educación of 2003).

The act established as functions of SINEACE to “Evaluate, in the national and regional ambits, the quality of learning and of pedagogical and management processes” and to “Develop, with the participation of the decentralized bodies, the indicators of quality measurement that

The Peruvian case for students' national assessments (1995-2015)

contribute to orient decision making” (Ley General de Educación of 2003). In addition, this act indicates as one of the functions of the Ministry of Education (Chapter V) to “Coordinate with the agencies commissioned to operate the National System for Evaluation, Accreditation, and Certification of the Quality of the Peruvian Education, the processes of measurement and evaluation of learning achievement under the terms established by law, as well as their dissemination” (Ley General de Educación of 2003).

As can be noted, the General Education Act of 2003, on the one hand, promotes the evaluation of quality of learning and management process as complementary processes and promotes a participatory establishment of the indicators to assess this quality for decision-making. This official government discourse incorporates evaluation and measurement as necessary and desirable processes of a national evaluation quality system. On the other hand, this act promotes measurement and evaluation of learning achievements as a monitoring process for accountability.

It is also worth mentioning that in this space the government in 2002 created the Forum toward a National Agreement involving the civil society, political parties, churches, and entrepreneurs in order to agree on a common vision of the country toward 2021, the bicentennial year of Peruvian independence (Acuerdo Nacional of 2012). This agreement has 30 national policies including a list of prioritized actions for education. The National Education Council in 2004 after a consultation with the Ministries of Economics and Education, entrepreneurs, the teachers union, the workers union, the national congress delivered to this Forum the Social Pact of Reciprocal Commitments for Education with four priorities in education to be reached in a short term (2004-2006). One of these priorities was the National Mobilization for Quality Learning in order to raise the performance level of the students in writing, reading and

The Peruvian case for students' national assessments (1995-2015)

mathematical reasoning in the evaluations of the Ministry of Education (Foro del Acuerdo Nacional, 2004).

The idea of measuring students' achievement and its results in the national and cross-national assessments is making visible the low level of learning and questioning the poor quality of the Peruvian basic education. In this implementation stage the discourse of significant actors (institutions and normative policies and proposals) for measuring and monitoring the outputs of the education system through standardized tests has been reinforced and positioned as necessary at the national level, such as the government, the Ministry of Education, and the civil society. The low results were equated with low education quality, triggering reactions for improvement and evaluation. At a discursive level there appears to be a national concern about education quality as a movement towards quality expressed in the acts and agreements. This movement, I state, was reinforced by the certainty of counting on mechanisms to ascertain such improvements through assessments.

In 2004, the UMC released the second criterion-referenced national assessment (UMC, 2004c) for the second and sixth grades of primary, and the third and fifth grades of secondary in mathematics, reading and writing, citizenship, and associated factors. This evaluation had the purpose to give information about the evolution of the means achievement between 1998 and 2001, to compare the students' performance with the findings of the national assessment 2001, to inform about the students' performance level according to their grade and evaluated subject, and to identify the school and extra school factors associated with student learning.

In the stage of implementation through the lens of Phillips and Ochs (2003) one can notice the "adaption any foreign model will inevitably be subjected to within the context of the borrower system" (p. 456). Thus Peru continues its path developing its national assessment

The Peruvian case for students' national assessments (1995-2015)

system and at the same time consolidating a discourse for assessments and measurement technically reliable and politically accepted. In this space assessments consolidate this discourse and contribute to its expansion to other significant actors and institutions at the national and subnational levels. However, in the international arena Peru declined to participate further in the following cycles of PISA in 2003 and 2006 apparently due to the lack of relevance of the results that would likely position Peru at the bottom of the ranking again (Cueto, 2007).

It is important to problematize at this point the relevance of the work and the available information from the national assessments 2001 and 2004 and PISA 2001. In this implementation stage what seems clearer is the relevance of the information for technical improvement of the national assessments and the expansion of the technical discourse associated with this technical work (see UMC, 2002b; UMC, 2004c). What does not yet seem so clear is the relevance for policymaking and improvement of the educational system. However, it could be argued that the information from the assessments does have the potential to mobilize official and unofficial discourses, agreements and commitments around education quality. As Cueto (2007) asserts in relation to the use of the results of the assessments for decision making

in order to happen it is necessary to have an education system with specialists that learn from the results of the assessments; this did not seem to be the case of the first assessment of PISA and maybe of neither national assessment nor LLECE. In general, the results of the assessments only seem to have resulted in catastrophic headlines of the newspapers and a declaration of emergency that –as much as it could be known in the public media- has not been based on a careful analysis of what the Peruvian students can and cannot do. However, the results of PISA and the national assessments have been

The Peruvian case for students' national assessments (1995-2015)

adopted by civil institutions such as the National Education Council to support the need for deep reforms in the education system. (p. 423)

In this implementation stage the students' assessments became part of the educational system and (1) the design for the students national assessments had been defined, (2) the technical knowledge and practice had been appropriated by the UMC, (3) significant actors such as teachers had been involved in the procedures to establish performance levels for the tests, (4) other significant actors of the civil society (Forum toward a National Agreement and the National Education Council) formally linked quality learning with its assessment, (5) normative policy created mechanisms for assessing quality, and (6) the participation in PISA was an important way of theoretical and practical learning.

The discourse of the Ministry of Education in relation to the role of the assessments for decision-making and improvement of education quality needed mechanisms to articulate the normative policy for assessments with the appropriation of the assessments at the national, subnational and school levels. The scandalization process from the performance of the students in national and international assessments triggered reactions such as the emergency program and other programs for quality improvement that was implemented by the Ministry of Education in this period as part of MECEP.

The assessments as part of the package of reforms were instrumental to monitoring the outputs of the implementation of the quality component of MECEP. However, in this stage it seemed that the assessments effort was still focused on articulating their approach with the quality component approach in order to generate useful information.

Stage 4 – 2006-2013: Internalization. “Expansion of Assessment and Measurement Logic”

In the internalization or indigenization stage the foreign example “becomes part of the system of education of the borrower country, and it is possible to assess its effects on the pre-existing arrangements in education and their modus operandi” (Phillips & Ochs, 2003, p. 456). Phillips and Ochs (2003) consider this stage as a series of four steps: (1) impact on the existing system/modus operandi, (2) absorption of external features, (3) synthesis, and (4) evaluation.

Phillips and Ochs (2003) suggest an evaluation process in the stage of internalization as a reflection in order to contrast the current situation with the previous expectations for borrowing. The results of this evaluation can motivate the initiation of another cycle to tackle the deficiencies of the previous cycle. However, political and economic decisions are not necessarily logical nor respond to a clear intention of incorporating the particular foreign example as has been mentioned in the previous chapter. Thus, it may not be possible to do an evaluation during the internalization stage assuming that the development of the borrowed idea can be compared with a previous expectation. Borrowing can also imply an unknown further situation without having a reference to compare with. For instance, Ochs (2006) suggests as a result of the application of Phillips and Ochs' (2003) model in the analysis of policy transfer in a London borough, that an ongoing evaluation is critical to the whole process or to the stages of borrowing, and that it should not be considered only in the stage of internalization.

The space: policies, players, and discourses. This stage of internalization of students' assessment developed and overlapped two presidential periods, 2006-2011 with President García and from 2011-2013 with President Humala elected until 2016.

This space is characterized by certain actions and discourses related to (1) the internalization of the idea of students achievement assessments through the annual

The Peruvian case for students' national assessments (1995-2015)

implementation of national assessments, (2) the regular participation in international assessments (OECD, UNESCO), (3) the explicit attempt to formulating learning standards, (4) the expansion of the idea of measurement and standards into other areas such as the management of schools and the teachers performance in accordance with the requirements of the General Education Act of 2003, (5) the active dissemination of the information from the students' assessments to other significant actors such as the principals, teachers, parents and, in particular, to subnational authorities for decision-making, and (6) the implementation of participatory processes of consultation nationwide to teachers and organizations of the civil society concerning the appropriate standards for teachers and school management.

In relation to the national educational policies a milestone in this stage of internalization is the enactment by the government in 2006 of the National Education Project⁴. This Project is the official national policy 2007-2021 formulated as required by the Peruvian General Education Act of 2003. The second objective of this Project states: "Students and educational institutions reach pertinent and quality learning" and accordingly establishes the following policy to: "Define national standards of prioritized learning and evaluate them regularly" (CNE, 2006, p. 13). The National Education Project uses the term standard although it does not define it. However, in the text, a standard can be understood and be equated with an indicator of educational achievement and also it is formulated in relation to evaluation and measurement of quality learning.

In the international context, Peru in this period continued to participate in the cross-national assessments. In 2007 Peru participated in the Second International Comparative Study in Language, Mathematics and Associated Factors of the Laboratory of UNESCO. In 2009 and 2012 Peru participated again in the following PISA cycles after declining to participate in 2003

⁴ The National Education Project has six strategic objectives, 14 results, and 33 policies formulated having a horizon to 2021, the Peruvian bicentennial as an independent republic.

The Peruvian case for students' national assessments (1995-2015)

and 2006 (Miranda, 2009). The participation of Peru in PISA 2009 was valued for different reasons: (1) as a means to monitor the students' academic achievement over time by comparing the 15-year old students performance with the performance of the PISA 2001, (2) as guidance for improving education and pedagogic policies such as the curriculum, the students textbooks, the performance standards, the teacher training, the exemplification of evaluative practice for teachers, (3) to identify the associated factors influencing the students performance in order to better understand the distribution of the learning opportunities and to foster debates around education and inter-sectorial policies, and (4) to improve the evaluation tools and technical level for the national assessments (Miranda, 2009).

This stage of internalization builds onto the acquired technical learning and experience of the UMC in the previous stages. In 2006 the UMC released for the first time a census assessment, which was a key change in the evolution of the national assessments. This assessment was for monolingual Spanish students of second grade primary and of bilingual students of fourth grade primary in mathematics and language. The design of the census assessment was criterion-referenced, as were the two previous national assessments in 2001 and 2004, but unlike these evaluations that were sample evaluations, this was a census evaluation of only one grade of primary (second grade monolingual schools, fourth grade bilingual schools) and did not include a study of associated factors.

The decision of having a census assessment was made by the Ministry of Education due to the low results from the students from the second grade (end of the first cycle of primary education) in the national assessment of 2004 (UMC, 2005; MED, 2009). The purpose of this evaluation was to monitor the development of the basic learning of literacy and mathematics in

The Peruvian case for students' national assessments (1995-2015)

the first grades of primary as a base to subsequent learning (MED, 2009). Therefore, for the Ministry of Education (2009) a census model was implemented in order to

give back the results not only to the local, regional and national authorities but also to the evaluated schools, principals, teachers and parents in order that these actors, in the ambit that corresponds to each one, be committed and to further contribute to the improvement of the students' learning. (p. 8)

Accordingly, the UMC for the first time elaborated the reports for schools, and the analysis guide for the teachers, both with information of the results of the school and classroom as well as with the national and regional (subnational) results. The guide for the teachers, in addition, included information about the test, the evaluated subjects and skills, and samples of items from the test and some recommendations to improving student achievement. Also, the UMC distributed a report for the parents, for the local and regional education authorities, and for the Regional Government (UMC, 2007).

The UMC has applied annually census assessments for the students of second grade of primary from 2006 until the present (2014) resulting in comparable information of public, private, urban and rural schools in the evaluated grades and subjects. It is particularly interesting the effort of the UMC and the support of the education authorities for providing information to the regional governments. Information of the census evaluation from 2008 to 2014 has been published, including the rankings of the regions according to their results. At present there is available a system for consultation of these results online⁵.

The discourse of the Ministry of Education is, as in the previous stage, focused on generating information for decision-making for improvement. However, what is new in this stage is the availability of reliable information from all the students of the country of one single grade.

⁵ See http://sistemas02.minedu.gob.pe/consulta_ece/publico/index.php

The Peruvian case for students' national assessments (1995-2015)

The logic is to reduce the number of grades of the previous sample evaluations and instead to obtain a census evaluation of a cohort. This discourse also underscores the agency for decision making at national, subnational, schools, and family levels based on the assumption of the possibility for changes that the information can prompt. Therefore, this information is assumed to help such as in policy decision, resource investment, pedagogic practices, and attention to disadvantage groups. Other assumptions are that the significant actors will understand the information from the assessments and will know how to improve or solve their education quality problems.

In 2011 the government of President Humala started with another Minister of Education and a team committed to articulating programs for quality and equity based on the policies of the National Education Project⁶. With an approved historic budget of 13,186 million soles (aprox. 5,000 million US dollars) for 2011⁷ (2,7% of the gross domestic product and 65% more than in 2006) the Ministry of Education has emphasized the implementation of programs around the following areas⁸: teachers' career, bilingual and rural education, access to preschool, decentralized management, and access to quality learning in language, mathematics, scientific and productive skills, and citizenship.

SINEACE in 2011, as established by the Peruvian General Education Act of 2003, approved the Matrix of Evaluation for Accreditation of the Quality of the Management of the Regular Basic Education Schools (Sistema Nacional de Evaluación, Acreditación y Certificación de la Calidad Educativa [SINEACE], 2014). This matrix contains the factors, standards, and indicators of quality for the management of schools. The process of accreditation is currently

⁶ See <http://www.minedu.gob.pe/noticias/index.php?id=12869>

⁷ <http://inversionenlainfancia.net/blog/entrada/noticia/878/0>

⁸ <http://www.cne.gob.pe/index.php/CNE-Infoma/foro-del-acuerdo-nacional-respaldo-prioridades-de-politicas-educativas-para-el-periodo-2012-2016.html>

The Peruvian case for students' national assessments (1995-2015)

voluntary. This matrix was elaborated with a participatory approach, involving the feedback, opinions and recommendations of students, principals, teachers, parents, and specialists of various public and civil society organizations (SINEACE, 2014).

Also for basic education, in 2012 SINEACE started approving and publishing the national standards called Progress Maps, defined as the following:

Clear learning goals that all the students of the country are expected to reach throughout their basic schooling. The standards are a tool that will contribute to achieving the long-awaited quality and equity of the Peruvian educational system, which has to assure that all the children and youth of the country, of any socioeconomic or cultural context, achieve fundamental learning. (SINEACE, 2013, p. 4)

The intention of the Progress Maps is to link the large-scale evaluation with the pedagogical rationale of the teachers through formulations of what the students have to learn as evidences in a progressive scale (SINEACE, 2013).

In 2012, the Congress approved the Act 29944 of Teacher Reform with a prescript for the Evaluation of Teacher Performance indicating:

The performance evaluation has the purpose of ascertaining the extent of the development of the competencies and professional performance of the teachers in the classroom, the school, and the community. This evaluation is based on the criteria of good teacher performance of the evaluation policies established by the Ministry of Education [...]. (Article 24, Ley de Reforma Magisterial of 2012)

Accordingly, the Ministry of Education approved the Framework of Good Teacher Performance⁹ as a base to build and implement public policies to strengthen the teacher profession (Ministerio

⁹ The official final version has four domains, nine competencies, and forty performances of what good teaching is and they are a requisite for every regular basic education teacher (MED, 2012).

The Peruvian case for students' national assessments (1995-2015)

de Educación, 2012). Previous to its approval by the Ministry of Education, this framework was a result of two years of consultations led by the National Education Council with teachers, public instances and institutions, private institutions and organizations of the civil society in order to build a national consensus of what a good teacher performance is. Based on this framework the Ministry of Education has started implementing the teacher evaluation recently stressing a meritocratic discourse for promotion in the teachers' career and increasing their salary due to performance.

Between 2006 and 2013 the student's achievement in the census assessments have increased in language and mathematics, however there is still a majority of students that do not reach a sufficient level according to what is expected in the curriculum (CNE, 2013). The results of the Peruvian students in PISA (between 2001 and 2009) and in the Laboratory of UNESCO (between 2006 and 2013) have significantly improved but are still very low (CNE, 2014a). It is important to note that in spite of these results, the authorities of the last two governments continued publishing the results of national and international assessments (CNE, 2014b).

In regard to this improvement the National Education Council (CNE, 2014b) has indicated, that it may be due to certain factors such as (1) the general improvement of the living conditions, (2) more investment in education, (3) the constant contribution by principals, teachers and parents to learning. In addition, national and international assessments have recursively pointed out the uneven distribution of learning, the lowest results coming from the students of rural and bilingual areas (CNE, 2013). The concerns of the Council reveal that there is no clear causation of the educational outcomes improvement, moreover, that it could be due to the general improvement of the economy of the country. This indicates that the assessments are not yet articulated enough for an evaluation system to correlate the impact of national programs

The Peruvian case for students' national assessments (1995-2015)

for improvement, or other focalized actions that the Ministry of Education was implementing in this period. Ultimately, it could be argued that assessments are not clearly providing contextualized information in order to have a national reflection about education quality. As the National Education Council expressed, there is an imbalance between economic growth and education quality, given that there is a sustained economy in the country in the last decades, the education quality is stagnant (CNE, 2014b).

The culture for evaluation, monitoring, and assessments have expanded in this stage of internalization. The logic of assessing the performance of teachers, students' learning, and the management schools with established indicators seemed to be part of the educational system for basic education. In addition, the involvement of individuals and organizations in the process of consultation for setting these indicators has also contributed to expanding a discourse of measurement and monitoring.

At this point, what has been internalized? According to the model there are four steps in this stage of internalization: impact, absorption, synthesis and evaluation (Phillips & Ochs, 2003). What I called the "idea" for students' assessments of learning outcomes was lent detached from a particular technical model. However, this "idea" was lent attached to a global discourse for measurement and monitoring learning outcomes as an indicator of measuring education quality. Ultimately, this "idea" was lent with a framework for standardization of common goals for the educational systems.

The impact of the assessments in the existing system is installed in the framework of the Ministry of Education, the practice of the UMC by implementing annual national assessments. I state that this impact is a highly technical work, reliable, and solid. What is still to be clarified is

The Peruvian case for students' national assessments (1995-2015)

the use of the results of the assessments for decision-making and improvement, according to their official purpose.

The assessments as part of an official policy have absorbed technical external features from international assessments. These external features are the design, reports, and analysis models incorporated in the national assessments. The incorporation of the global discourse for measurement and assessments in the Ministry of Education is a type of absorption.

The synthesis or recontextualization of the assessment as a national policy has evolved according to the political priorities of information. Initially in the stage of decision, the UMC had to decide which model to use for the assessments, later on the implementation stage consolidates a model and had a more clear purpose. In the internalization, based on this consolidation, the UMC has expanded the scope to a census assessment in order to provide information to all the schools of the country. The emphasis in disseminating information from the assessments for improvement and decision-making is core to the purpose of the assessments with increasing clarity since early 2000, and it could be argued that through the census evaluation this national commitment has been internalized in order to reach urban and rural schools, as well as monolingual and bilingual. However, the discourse and technical effort for generating and disseminating the information seems an enormous enterprise in relation to the limited use of this information.

The evaluation, as a reflection of the work implemented since the late nineties by the UMC, reveals that there seemed to be a disjuncture between the production of information and use of this information for decision-making and improvement, as it will be explained in the next stage.

Stage 1 – 2014-2015: “Cross Sectoral Transfer, Reproduction of knowledge”

According to Philips and Ochs (2003) policy attraction is motivated by an internal situation that requires improvement or change (impulse); thus an external alternative or foreign model is searched for according to the national interests and needs (externalizing potential).

There are some key indicators of the beginning of a new cycle triggered by the availability of comparable information from the census evaluation between 2006 and 2014, and by the availability of economic resources for the education sector. Such indicators are certain policies for school improvement based on monetary incentives and the reproduction of technical knowledge through the implementation of regional (subnational) assessments.

In this new cycle, the impulse for change, are the similar education problems to those in the 1990s. Quality, equity and efficiency of the education system have not significantly improved. Despite the significant improvement of the students from second grade of primary in reading comprehension from 16% in 2007 to 44% in 2014¹⁰ there is still half of the school population that does not reach what is expected in the curriculum. The national and international assessments have been recursively pointing out the low achievement level of Peruvian basic education students, as well as the deep inequity in the distribution of learning amongst the population. The political and economic situation of Peru has remarkably improved in relation to the 1990s. Democratic governments have been elected uninterruptedly since 2001, and gradually the level of investment in education has improved from 2,7% in 2011 to 3,5% (approximately 23,000 million soles or 8,000 million US dollars) of the gross domestic product in 2015 (17% of the general budget of the country)¹¹. The expected investment of 6% of the gross domestic

¹⁰ See data base <http://umc.minedu.gob.pe/?p=1357>

¹¹ <http://elcomercio.pe/politica/gobierno/peru-se-ratifica-invertir-al-menos-6-pbi-educacion-noticia-1813125>

The Peruvian case for students' national assessments (1995-2015)

product per year, as part of the policies of the National Agreement (Acuerdo nacional, 2002) has yet to be reached.

The externalizing potential at the national level is a different approach based on incentives and accountability based on information from the national tests as well as the use of monitoring systems. At the subnational level, in the vein of fostering decentralization management, there is a reproduction and value of technical knowledge through the implementation of regional assessments.

The space: policies, players, and discourses. By the end of 2013 a second Minister of Education assumed the responsibility of conducting the education sector. The new team leading the Ministry of Education continued with the programs initiated by the former Minister such as improving quality learning and revaluing teachers careers. In addition this team emphasized the implementation of programs with a significant investment in infrastructure (with national funds and the participation of private investment through public private partnerships), and to boost the management of the education system and schools¹².

In this stage the implementation of the Curricular Framework from the former team of the Ministry of Education, the proposal of accreditation for basic education of SINEACE are on standby. The feasibility of these proposals is under scrutiny. At present the new authorities in the Ministry of Education have proposed the accreditation only for higher education institutions, not valuing the accreditation of basic education schools as an opportunity for an institutional change. Furthermore, in the proposal delivered to the Congress, the Ministry proposes the creation of a Council for Accreditation of Higher Education and the extinction of SINEACE which is the current institution in charge of the quality of the whole educational system (basic, vocational and

¹²[http://www2.congreso.gob.pe/Sicr/Prensa/prensapubli.nsf/34069c3bb71c123b05256f470062fea7/C0CED1B7D5C763CB05257D9F006D16E9/\\$FILE/LaVoz145.pdf](http://www2.congreso.gob.pe/Sicr/Prensa/prensapubli.nsf/34069c3bb71c123b05256f470062fea7/C0CED1B7D5C763CB05257D9F006D16E9/$FILE/LaVoz145.pdf)

The Peruvian case for students' national assessments (1995-2015)

higher education levels). These types of decisions may be due to the predominance of a technocratic vision of education discarding the national search for education quality with a holistic vision of the system articulating its different levels, and participatory process involving teachers and principals within the schools.

The orientation and emphasis of the new team in the Ministry of Education seems to be more focused on the efficiency of the expenditure and in promoting initiatives based on incentives and competition. For example, the Ministry of Economics approved in 2014 as proposed by the Ministry of Education a legal decree to assign a monetary incentive bonus for school performance in the census evaluation. This bonus is defined as the “recognition for improved student learning in public schools during the previous year, favoring the directive and teaching personnel, permanent or temporary, of public basic education institutions with better performance” (Decreto supremo No. 287-2014-EF, 2014). The criteria to be eligible as a school with better a performance are: (1) to demonstrate greater progress in learning achievement, (2) student retention, and (3) timely recording of information for management in their respective subgroups or strata. Thus, students' achievement in the census evaluation, reduced rates of student's dropout, and the timely registration in the national system of the student's enrollment and evaluation data are considered to grant the bonus to the personnel of the schools. A framework linking the students' performance from the national large-scale assessments with monetary incentives is a salient characteristic of this stage.

In this regard the National Education Council has formally expressed to the Ministry of Education its concerns for this decree. The Council (CNE, 2014c) has questioned the following assumptions of the decree: (1) the work of the teachers during one academic year produce the learning improvement, (2) the census evaluation is an univocal way of proving student's

The Peruvian case for students' national assessments (1995-2015)

learning, (3) the incentives recognize the differential effect of teachers work and motivate them, (4) teacher's performance will improve if teachers are more motivated, (5) the permanence of the students in the schools is only a consequence of the teachers work, and (6) the registration of information in the system is a significant indicator of responsibility of the teachers and the school. The Council has expressed its stance against these types of incentives elaborating on these assumptions, claiming for an explanation of the relationship with the teacher's career plan and to warn about the risks of institutionalizing this practice.

Additionally, it is worth mentioning that the change of large-scale assessments as descriptive or low-stakes tools to use them as high-stakes for accountability and rewards based on students performance could introduce distortions and compromise their reliability: "Such distortions include a narrowing of the curriculum to focus on the subjects or competencies tested in the assessments, and undue emphasis on test preparation, and even outright cheating by students, teachers and schools participating in the assessment" (Lockheed, 2012, p. 516). In the present year 2015 the implementation of this incentive bonus to school performance based on the census evaluation continues.

The UMC keeps implementing and reporting the results of the census evaluations, and Peru will participate again in the next cycle of PISA in 2015. A recent seminar organized by the Educational National Council in March 2015 called "Uses of the students' performance assessments in Peru"¹³ has updated the discussion around the uses, potential uses, future uses and risks of using the information from the assessments. The participation in this seminar of key players of various institutions made it a useful reference of their opinions, experiences and stances in regard to the main topic of the seminar. The Ministry of Education at the national level

¹³ Seminar organized by the National Education Council with the financial support of Canadian International Development Agency.

The Peruvian case for students' national assessments (1995-2015)

was represented by presentations of Minister, the chief of the UMC, representatives from the strategic planning secretariat in charge of the incentive bonus for schools. Also participating were Educational authorities from the regional governments, from the civil society as the National Education Council, NGOs, private organizations, and international consultants in evaluation. At this seminar emerged important information such as (1) the need for UMC to have a plan of national assessments combining census with sample designs, (2) the little use of the information from the assessments for decision making at the school level, (3) the design and implementation of regional (subnational) assessments, (4) the risks of starting a trend for using the results attached to monetary incentives, such as the incentive bonus to schools, given the international experience and negative consequences in the midterm, and (5) the need of having an evaluation system articulating the standardized large-scale assessments with the classroom evaluations¹⁴. This information summarizes key concerns in relation to the role and potential new uses of the assessments at the national and subnational levels.

The space in this new cycle is characterized by two facts that I argue are indicators of a new tendency in the evolution of the assessments. These indicators are the implementation of monetary incentives as a reward according to the school improvement in the national assessment, and the implementation of regional or subnational assessments. These could be due to the availability of comparable information from the census evaluation, and by the political decision of investing more funds in the education sector at the national and subnational levels. These facts have a discourse in relation to education, policies and power, as well as a particular approach to knowledge production and reproduction.

¹⁴ My participation in this seminar was online. For more information see <http://www.grade.org.pe/novedades/cne-y-forge-debatieron-usos-de-las-evaluaciones-de-rendimiento-escolar-en-el-peru/>

The Peruvian case for students' national assessments (1995-2015)

The discourse of the bonus as stated in the decree is linked to the definition of quality of education of the Education General Act of 2003 as a contributing factor through a teacher and administrative career that motivates the professional development and a better performance (Decreto supremo No. 287-2014-EF, 2014). Therefore, it is assumed as a strategy for teachers' development.

In a historically poor country that is now a middle-income country facing globalized challenges in order to keep its economic growth, the availability of funds for education and priorities for investment may depend on the framework of the leading team in the education sector and in the economic sector. Decisions for incentives conditioned on students' performance seemed a cross-sectoral logic, that is, a logic that provides monetary rewards for merit and performativity based on evidences. This is a new logic to be recontextualized in the education sector.

Regional assessments are based, as expressed in the Seminar, on the need for having contextualized information to make pertinent decisions, such as programs for monitoring and pedagogical support for schools or to make improvement plans. The rationale is diversifying, contextualizing, and making decisions for improvement based on evidence from the assessments. Their proposal is to contextualize the work that the UMC does at the national level on a subnational scale. What could be happening is that the regional governments may be reproducing a technical knowledge well positioned at the national level. However, the technical level of their work may be questionable given that the leadership and expertise in the design and implementation of the national assessment is located mainly at the national level. The relevance of this work may be questionable as well, given that there is a census evaluation carried out annually and it is worth asking if the additional information that this effort may bring is reliable

The Peruvian case for students' national assessments (1995-2015)

to make comparisons and to make decisions. These are hypothesis that exceed the limit of this research paper and need to be proven with empirical work.

In a historically centralized country such as Peru where education policies were traditionally made at the national level in the Ministry of Education, the regional governments gradually have been encouraged to make decisions for improvement based on evidence. The messages and discourse transmitted through the information generated by the UMC are not neutral. The national policy for assessments is respectable and has a technical knowledge that is valued and considered prestigious, it is an externalized source of information that could be use to justify decisions and excerpt control and power. I argue that there is transference of a technical discourse through the assessments from the national level to the subnational level. This discourse may be technically reproduced with the risk of also reproducing the lack of connection to education quality.

Chapter 4: Discussion and Conclusions

In this final chapter I will address some topics as a result of the analysis of the Peruvian case in relation to the application of Phillips and Ochs' (2003) model and some characteristics of the evolution of the assessment and measurement trend in Peru. Finally, I have included some questions for further research that can complement and contribute to better understand and the recontextualization of the assessment as a global trend.

A case of borrowing or lending?

The Peruvian case is a case for borrowing and lending at various levels. Firstly, in the 1990s it was a match of interests between the World Bank for lending (funds and a package of educational reforms) and the Peruvian government for borrowing (funds and an internationally referenced package of reforms). Additionally, the World Bank had the interest in 'helping' Peru in its reinsertion in a global economy, and the president of Peru had the interest in economic resources to invest in programs conducive to his presidential reelection.

Secondly, in this package of reforms lent and borrowed there is included the specific quality assessment system through national standardized students' assessments. This system was not required by the borrower but came with the lent package for primary education (curriculum, teachers and principal training, textbooks for students, and infrastructure).

Thirdly, the pedagogic components such as curriculum and training were borrowed attached to an active learning pedagogical approach, thus this approach can be considered as lent by the Bank. The assessments system was not lent attached to any particular technical evaluation design or approach, but this system had to include in its design the characteristics of the active learning curricular approach.

The Peruvian case for students' national assessments (1995-2015)

So, is it a case of lending or borrowing? I would say it is a case of borrowing/lending policy transfer given that what was borrowed and lent are intertwined, and that the assessment system was instrumental to the other reforms. In relation to the purposiveness of borrowing mentioned by Phillips (2009), this is a case where what was borrowed was purposive (pedagogical components) and what was lent (assessment system) was included in a borrowed package. Therefore, the purposiveness of borrowing in the sense that it is a voluntary and not an imposed decision applied to the Peruvian case, but reception of the lent idea of the assessment system was not a foreign model identified elsewhere.

The stages of the model of Phillips and Ochs (2003) is useful to analyze this borrowed and lent package of reforms, but gradually, each component of this package has to be analyzed independently (but in relation to the others) given that they can develop at different times.

The processes of appropriation, contextualization, recontextualization and internalization

The pedagogic quality components of the package had to be recontextualized into the national curriculum, the national in-service teacher's training system, the students textbooks, given that they already had a pedagogic approach. This recontextualization entailed a technical appropriation of the new educational paradigm and how to operationalize it. Moreover, this recontextualization implied the encounter of pedagogical and contextual situated logics of the formulators in the Ministry of Education, the trainers of the subnational levels and the implementers in the schools of different regions of the country. This meaning making process led to a process of appropriation that, in particular in the teacher's training program, depended of the trainers of the institutions and on the urban and rural teachers epistemologies and material conditions.

The Peruvian case for students' national assessments (1995-2015)

The appropriation of the assessment system entails (1) the political discourse for assessments, that is, the use and role of the information from the assessments in the Ministry of Education, (2) the technical discourse and mechanisms for implementation of a reliable system, and (3) the approach of the pedagogic components of the package of reforms. The contextualization was technical and political. The technical contextualization entails an appropriation of the statistical and evaluative designs according to the large-scale assessment requirements by the national team in the Ministry of Education; also logistic and administrative learning was involved. Given that the assessment system was under responsibility of the national authority, the meaning making process of the team in the Ministry of Education was concentrated in an expert group. This expert group has contact with other experts from international institutions.

The political contextualization was about disseminating and using the information from the assessments for decision-making and improvement. Political and technical contextualization had evolved according to the nature of their task. For instance, the technical contextualization had been highly rigorous and the political contextualization was constantly challenged by the lower results of the students in the assessments. At present the assessment system has been internalized as a regular practice at the national level, as well as the political commitment for disseminating the results. Thus, internalization of the assessment system has occurred in the educational system at the level of the official policy formation. However, at the level of policy appropriation at the national and subnational levels the information of the assessments is not yet used for improvement in policies or at school. Why the information is not used? Or it is a matter of understanding or translating this information into concrete decisions or actions for improvement? Are there two logics that cannot match? I state that assessments is a current

The Peruvian case for students' national assessments (1995-2015)

internalized practice in Peru, it is installed in the education system, it has been technically appropriated in the Ministry of Education but it has not been appropriated by the intended users of the information.

Is the global discourse for assessment yet to be recontextualized in Peru?

The development of the assessment system that is an idea, a global discourse and a trend to be recontextualized within the education system had a logic originally from imported technocratic and economic discourses. The assessment system had to be technically contextualized in Peru, but also its original technocratic and economic logic and discourses have yet to be recontextualized. It is worth making a key distinction between the technical contextualization expressed in a solid national assessment system, and the need for recontextualization of the imported technocratic and economic logics of the global discourse for assessments and accountability. Therefore, this discourse has yet to be nationally recontextualized in relation to education quality and I argue that this is one of the reasons why the use of the assessments is expose and vulnerable to the economic and technocratic rationale at present in Peru.

The evolution of the assessment system took approximately a decade to find the adequate technical characteristics and to consolidate itself as a rigorous practice. In the following years it had to face the challenge of developing a census evaluation with the enormous task of producing reports for different audiences and disseminate them. While the assessment team was solving the technical priorities, the discourse for the use of the information from the assessments remained the same: no stakes, improvement-purpose. This technical discourse was instrumental to a search for education quality.

The Peruvian case for students' national assessments (1995-2015)

I argue that the discourse for assessment has been contextualized and internalized as a technical practice for improvement, supported by official policies, acts and players, as well as unofficial stakeholders. The Ministry of Education had to solve the technical issues in order to implement the assessment system. However, once it turned out to be a consolidate, reliable and internalized practice and knowledge and with the census evaluation the information was available for all the schools, the original discourse for monitoring, control and competition through incentives have appeared in Peru. Two facts contribute to the appearance of this discourse: the availability of reliable information of “all” the schools of the country and the disposition of more national funds to invest in education. In addition, Peru as a middle-income country needs to sustain its economic growth having better trained human resources, and the logic of the new authorities in the Ministry of Education with a background in the economic sector field. Global pressures are latent in the national economy and in the educational system in order to accelerate the “quality outputs” of the system. Assessments seemed to be at risk to incorporating the global trend logic that has never been recontextualized. Thus, at present it is imperative to address this recontextualization in light of the existent national official discourses for education quality and equity included in acts, institutions, agreements, as well as in unofficial discourses through participatory a process involving educational stakeholders.

Reforms in globalized times and the role of the nation state as a mediator, is an opportunity for a context-based defining education quality and policies conducive to it; however, the politics and economics as an argument is reflecting a tension between education quality and equity and the requirements and pressures for economic growth.

Reproduction of knowledge and power through students' assessments?

In the consolidation and expansion of the assessment practice in Peru, a type of knowledge and rationale was developed and gradually expanded from the expert team in the Ministry of Education to other subnational educational authorities and stakeholders in the subnational level. Through the dissemination of information for improvement by the UMC also a technical and prestigious knowledge based on evidences was disseminated. I argue that this situation is positioning the UMC as the expert office at the national level in a top-down place in relation to the knowledge, rationale of the subnational authorities. These authorities and specialists are intended to be users of the information but not producers of this knowledge.

With the increased funds transferred from the national level to the subnational levels for education, and having the discourse of assessments being disseminated especially through the census evaluation in the internalization stage, the subnational authorities are creating and implementing their own assessment systems. This is a legitimate aspiration and, as the subnational authorities argue, it is necessary for making diversified decisions for their regions. However, what appears as a concern is the reproduction of a technical prestigious knowledge valuable as itself but without clear links to contribute to improve education quality in the subnational levels. Through this reproduction of knowledge may be a reproduction of power, but in this case from the top-down vision of the team at the regional office to the schools.

The practice for assessments and the search of education quality

In these two decades assessments have technically tried to address the challenge of providing information for quality and for equity policy decision-making. Especially after 2001 gradually there has been a political commitment to generate information, for instance, from

The Peruvian case for students' national assessments (1995-2015)

bilingual population in their own language. An assessment as a tool has the potential to contribute to improving education quality, but it is not education quality.

It is worth noting also the commitment of the civil society through the National Education Council, the Forum for a National Agreement, and official discourses as the General Education Act (2003) underscoring the need of reaching education quality of education, although in their discourse education quality may be associated with the measurement of learning outputs.

In the continuum of the stages, what guides the moving from one stage to another? What are the specific features in each stage that make the difference with the other?

The components of the lent and borrowed package of reforms starts at the same time but evolve at different times given their particular characteristics, and at some point each component follow its own route according to technical development, political priorities, and logistic feasibility. For instance, while the curriculum or training components were in the implementation stage, the assessment system was (despite its implementation in the field) still in the process of decision. Therefore, a process of borrowing and lending of these components turns into various processes developing along the different stages at different times.

Moreover, the stages overlap and the definition of a stage cannot be applied rigorously because there are nuances affecting its development. For instance, the assessment system was in a trial version during the first two national assessments (decision) even though these assessments were carried out (implementation). The rationale to argue that despite its implementation the assessment system were still in the decision stage is because it did not have a clear place and role within the educational system. Political and technical decisions and definitions had yet to be done.

The Peruvian case for students' national assessments (1995-2015)

So what guides the process or determines the stage of the foreign idea? It could be argued that ultimately the basic definition and principles of each stage according to Phillips and Ochs (2003) is a guide but that the researcher can determine the stage in relation to the characteristic of the particular case of study. The process of the evolution of the foreign idea from cross-national attraction to internalization cannot be followed strictly with the full-circle model expecting that one stage finish to start the other. The stages overlap and may have backward and forward movements. For instance, in the Peruvian case, the stage of implementation of the technical knowledge for assessments was consolidating and internalizing in the educational system, but what determined the stage of internalization was (1) the expansion of the assessment discourse for improvement to reach all the schools of the country and (2) the expansion of the assessment discourse into other areas of the educational system as the teacher's professional career and the school management.

The utilization of Phillips and Och's (2003) model is a structure for the analysis. This analysis has to consider other methodological and theoretical concepts in order to fully address policy transfer in a globalized context. For instance, the incorporation of network analysis of Larsen and Beech (2014), the concept of policy as practice (Levinson & Sutton, 2001), the discursive, political and economic dimensions of education policy (Ball, 1990) and their interaction in specific spaces have contributed to the analysis of the Peruvian case.

Future research

The analysis of the Peruvian case can shed light on the process of borrowing and lending of the assessment logic and practice in other developing countries. The findings and conclusion of this research paper can be contrasted with empirical information from the actors and

The Peruvian case for students' national assessments (1995-2015)

institutions at national and subnational levels in Peru. Some of the questions that remain and need to be addressed are:

- Is the information from assessments reaching the need of information for the intended and diverse users? Does the information from the assessments have the power to trigger changes for improvement?
- Why and how are the assessments reproduced at the subnational level? Are there new spaces at the subnational level triggering a trend for assessments?
- What is the reference of the cross-sectoral attraction? Is it a logic that can be absorbed by the educational system and the civil society? Can this logic be recontextualized within a framework of education quality?
- Why are there incentives policies now and not before? What are the characteristics of the current space triggering these types of decisions?

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