

## **A 'war' of discourses. The formation of educational headship in Italy**

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*Abstract:* This article is about a massive process of “actorhood” formation that occurred in the Italian education system during the last ten years as a consequence of the renewal of head teachers’ role. The “triad [selection, recruitment and training] of institutionalised processes” took on a different shape and new training policies were implemented. This work illustrates how the process of designing the training activities was developed through the use of two institutional models and influenced by conflicting discourses. The contradictions embedded in the policies for designing new head teachers and setting the “core technology” to prepare them is commented upon, and the conflict between the ‘old’ bureaucratic and professional discourses and the ‘new’ managerialist discourse is analysed. The way these “discourses” have been in a constant struggle is illustrated adopting a neo-institutionalist perspective. The war between discourses produced isomorphism in Italian education policies in two ways: i) in the case of the formal organizational structure, through the introduction of homogeneous head teacher training models, by looking at the experience of other educational systems; ii) in the case of the institutionalization of the head teacher’s role, by following a managerialist-entrepreneurialist model. Evidence of the entrance of the managerialist discourse on the scene of Italian education policies is given. Moreover the old bureaucratic and professional discourses displayed all their strength in resisting the managerialist discourse.

*Keywords:* discourses; head teachers’ formation; training; isomorphism.

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## **Introduction**

This article is about a massive process of “actorhood” formation (Hasselbladh and Kallinikos, 2000) that occurred in the Italian education system during the last ten years as a consequence of a new school autonomy framework. This major reform of the Italian education system came into force in 1997. The process aimed to support head teachers in developing the new competences necessary for their new role within school autonomy. In this scenario the «triad [selection, recruitment and training] of institutionalised processes» (Gronn, 2002, p. 1032) took on a different shape and new training policies were implemented. One of the most significant changes was the introduction of a new in-service training and induction policy regarding all head teachers.

The aim of this work is to illustrate how the process of designing (Gronn, 2003) the training activities was developed through the use of two institutional models. The first was implemented in a training course targeting all 10,000 head teachers in service in 1999-2000. The task of “trans-forming” such a large number of experienced head teachers into a new kind of high-ranking civil servant was very demanding and the Ministry decided to outsource the training process. This great effort was followed by a return to internal bureaucratic processes, however, when a few years later the time came to select new head teachers and to organize their induction.

The contradictions embedded in the policies for designing new head teachers and setting the “core technology” (Young and Brewer, 2008) to prepare them will be commented upon, and the conflict between the ‘old’ bureaucratic and professional discourses and the ‘new’ managerialist discourse will be analysed. The way these “discourses”<sup>1</sup> have been in a constant struggle (Ball, 2006) for affirmation on the grounds of educational policy is illustrated adopting a neo-institutionalist perspective. According to this approach, in the educational institutional field the “regulative, normative and mimetic (cognitive)” pressures (Scott, 1995) tend to produce

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<sup>1</sup> «Discourses are about the things that can be said, and thought, but also about who can speak, when, where and with what authority. Discourses imply the meaning and use of propositions and words. Thus, certain possibilities of thought are constructed. Words are ordered and combined in particular ways and other combinations are displaced or excluded» (Ball, 2006, p. 48).

“isomorphism” (Meyer and Rowan, 2006), i.e. the diffusion of homogeneous organizational structures (e.g. self-managing schools), roles (e.g. head teachers as managers) and processes (e.g. external accountability), etc. Many of these pressures, in fact, tend to counteract the organization of “loosely coupled” schools (Weick, 1976) and push towards higher levels of tight coupling, consistent with managerial beliefs and techniques. Nevertheless, recent neo-institutional literature underlines how “there are limits to isomorphism” depending on the “path dependencies” of each system (Meyer and Rowan, 2006), where pre-existing networks and power relations between actors, organisations and institutions reveal their legacy.

The aim of this article is to show how the war between discourses produced isomorphism in Italian education policies in two ways: i) in the case of the formal organizational structure, through the introduction of homogeneous head teacher training models, by looking at the experience of other educational systems; ii) in the case of the institutionalization of the head teacher’s role, by following a managerialist-entrepreneurialist model mirroring the private sector. The managerialist discourse thus entered on the scene of Italian education policies. Patterns of path dependencies also become clear in the Italian education system, however, since the old bureaucratic and professional discourses displayed all their strength in resisting the managerialist discourse.

The methodological approach adopted is briefly described in the next paragraphs, which also refer to discourse analysis and data collection criteria. The main features of the Italian school autonomy and those of the school heads are then outlined, as for the laws and other formal regulations in force. Finally, two different institutional forms of head teacher training are presented by exploring some characteristics of the normative and cognitive pillars. An attempt is also made to interpret the war of discourses being waged within Italian policies regarding educational leadership.

### **The methodological approach**

Some aspects of the shift that occurred in the Italian education system can be effectively captured by identifying the discourses underlying education policies at various stages of their development. In this perspective, discourses can be considered as heuristic tools which allow the

different, sometimes contrasting logics underlying the policies and their implications, to come to light. Three discourses are considered as tools for this analysis:

- the *bureaucratic discourse*, where being accountable means providing formal evidence of adhering to centralized government regulations. In this perspective, the state is the schools' monopolistic owner, the sole employer of personnel and the only decision-maker on educational matters, such as curriculum development, assessment, testing, etc.;
- the *professional discourse*, where the focus is on training practices and values of a typically professional nature and the development of competences is seen as a priority, a means to maintain a higher degree of autonomy for each professional;
- the *managerialist discourse*<sup>2</sup> which compares the educational world with a quasi-market perspective, creates new conditions of competition among schools and introduces new accountability processes.

The influence of these discourses on the head teacher training activities run between 2000 and 2006 is explored through documentary analysis of the regulation framework, including laws, policy documents, guidelines and recommendations. Statistics and working documents were also analyzed, such as evaluation reports, training planning and materials, on-line tools, concerning both the in-service training modules run in 1999-2000 (first stage) and the induction modules run in 2002, 2004 and 2006 (second stage).

In the case of the 1999-2000 in-service modules, where external agencies and consortia were appointed to run the activities, the following dimensions have been taken into consideration:

- the sector of training agencies (private, public or mixed);
- the kind of training portfolio (specifically focused on educational matters or mainly oriented to non-educational actors-organizations);
- values, key words and slogans characterizing each agency's training mission;

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<sup>2</sup> For a critical discussion of the managerialist discourse cfr., Thrupp and Willmott, 2003. Reference to the distinction between managerialism and managerialization (Clarke, Gewirtz and McLaughlin, 2000); the first implies a normative dimension, concerning beliefs, orientations and values; the second indicates the diffusion of managerial techniques and practices.

- the academic and professional background and identity of each training project leader.

Although a detailed content analysis was not undertaken, the classification achieved allows for a clear distinction between agencies and consortia, according to the values and styles typical of the different discourses.

Some examples may be useful. For instance, a private agency belonging to the most important national car manufacturer, with a portfolio typically targeting a business audience, presented a project clearly inspired by the managerialist discourse. As did a consortium led by the most influential private business and economics university, which sponsored the import of managerial logics into schools. Another consortium, including a professional association and a training agency with a portfolio targeting both educational and public service audiences, was classified as a representative of the professional discourse, however. Their slogan was the introduction of head teachers to 'school-tailored management', with a strong emphasis on the specificity of education issues. In this case, the project leaders were academics interested in critical leadership studies and equity issues. An overview of the classification is presented in Tables 1 and 2 (see below), on which the following interpretations draw.

In the case of the 2002, 2004 and 2006 induction modules, the analysis of official documents and statistics allowed to explore both the organizational structure of the course, completely internalized by the ministry bureaucracy, and the implementation of the guidelines during the training processes (see below Tables 3 and 4).

### **The autonomy regime and the new status of heads**

Before the 1997 school autonomy reform, the bureaucratic and professional discourses both prevailed and intertwined, thus configuring the Italian school as a typical case of "professional bureaucracy" (Mintzberg, 1985; Romano and Serpieri 2006). In fact both bureaucratism and professionalism could be seen as converging in a wider 'welfarist' discourse. The latter is, in fact, a «combination of administrative rationality and professional expertise [and, as such,] welfarism is a broad church

which draws on diverse and often contradictory sets of concepts» (Gewirtz and Ball, 2000, pp. 254-5).

The origins of the present autonomy framework date back to the 1970s, when the Italian school system started to be at the centre of the deep crisis that was affecting the various western welfare systems. The emergence of the managerialist discourse and the related institutional pressures thus opened the floor to school autonomy, as a means of institutionalising post-welfarist structures. The ideological claims of the “consumer-citizen” alongside parental and local demands (Ball, 1994) began to increase in Italy, as in other countries. Ideas already circulating during the debates of the 1970s and 1980s gained momentum in the 1990s. Head teachers were increasingly seen as entrepreneurs and managers and the need for evaluating head teachers’ performances began to be stressed (Barzanò, 2007).

In the years straddling the new millennium, important reforms flourished in the Italian education system. A new institutional structure was established granting autonomy to each school (1997) within the framework of a wider decentralisation that involved the whole state administration. New educational leadership policies were created and the head teacher’s role followed an international trend in undergoing significant changes, (Ball, 1994). The aim of these policies was to “design” the leaders (Gronn, 2003) of the new autonomous schools, following the logic of New Public Management. It is important to underline, however, that the notion of autonomy takes on a special meaning in the Italian context: Italian school autonomy represents an important step in the development of the education system but appears quite ‘weak’ with respect to what is meant in other systems.

The role and responsibility of head teachers may have been the area of major impact, but there is broad agreement among experts and practitioners on the limited effects of the reform (Armone and Visocchi, 2005; Fisher et al., 2002; Ribolzi, 2006). Many expectations created by the new framework were not met and change was less significant than foreseen, given the resistance of the bureaucratic and professional discourses.

#### *The structure of autonomous schools*

The main aim of the school autonomy reform was to sever the hierarchical relationship between the Ministry of Education and schools.

Schools were no longer seen as mere providers of a service following central guidelines on administrative and curricular issues. The Ministry was to be solely in charge of the general governance of the system. Regions and Local Governments were called on to give their contribution to the system and their competence in educational matters and professional training was improved (1998-2001). Nevertheless, the state held on to a range of general competences: it continued to outline general education principles and establish threshold performance levels; it still evaluated and controlled and it continued to provide basic financial resources (to which Local Governments had to contribute). It was also responsible for appointing educational staff at all levels through its regional administrative offices. Autonomy therefore did not concern personnel recruitment or management, which continued to follow bureaucratic criteria and actually created strong constraints to any real school autonomy.

The main features of autonomous schools can be summarised as follows: first, more room was dedicated to school projects and to local curricular priorities, thanks to the institutionalization of the School Plan, which became an official document. Second, the logic of networking with other schools and organizations was encouraged, although this swung ambiguously from competitive to collaborative perspectives. Third, the collegial nature of school governance was maintained, despite the new status of heads: decision-making remained the fruit of the combined action of the head with the collegial and elected bodies.

#### *The status of head teachers*

Some background information regarding the head teacher's role is useful to understand today's conditions. In Italy, before the Republic, head teachers were selected among teachers, basically through a political ballot. With the advent of the Republic (1948) the principle of an "open competition" was introduced to select all civil servants, including educational staff. Since then, head teachers have to be qualified teachers and to win a selective competition held in Rome (now in the regional offices). The 1974 regulations created the model of governance on which today's setting is based. The principles of a democratic and professional participation were introduced and two major collegial bodies were created: the School Board made up of the head teacher and the representatives of both staff and parents/students and chaired by a parent; the Teachers

Assembly, composed of the whole teaching staff and chaired by the head teacher. The school was regarded as a democratic community organized by a professional team of teachers, but still a state body. The head teacher was then a *primus inter pares* among teachers, still a civil servant, a ratchet in a bureaucratic hierarchy.

With the shift that occurred in 1997, head teachers were in fact upgraded from the level of middle management to that of higher-ranking civil servants and did not depend on the peripheral Ministry hierarchy anymore. However, since the internal decision-making structure had not been changed, their new responsibilities were assumed within a framework of governance that had been left almost untouched. Their responsibility for resources concerns solely the use of financial resources. They cannot recruit or hire teachers or other staff, who are assigned to the school by peripheral Ministry offices. They have power solely over the organisational rules of behaviour within the school, teaching being the direct responsibility of teachers. Moreover, school autonomy implies the independent negotiation of the school with the Unions regarding aspects such as professional development and school organization. This therefore provides further constraints to their action. The upgrading requirement for the 10,000 head teachers in service was participation in the training activity, which is the focus of this analysis.

### **Heads' recruitment and training: a long and demanding process**

As anticipated above, two stages can be identified in the training of the head teachers of the new autonomous schools. The first involved experienced head teachers who were leading the schools before school autonomy came into force. The second concerns new heads starting service within the new framework.

#### *Trans-forming head teachers: a chance for the managerialist discourse.*

The first stage of updating serving head teachers implied two significant innovations with respect to the past. First, the traditional differences between primary and secondary heads were abolished, since the profile of

the two roles, and therefore the training, were conceived as being within the same scenario<sup>3</sup>.

Second, individual differences in heads' formations were tackled through a compulsory training process. The training process aimed at providing a common framework rooted in cognitive scripts and shared values. Its purpose was to enhance head teachers' confidence in the perspective of school autonomy, by improving their skills in dealing with a plurality of curricula items and their capacity to adapt to local 'imperatives'. It was an attempt to reduce the predominance of bureaucratic tasks and to orientate professional competences towards a more proactive role. Many of the rhetorical devices that accompanied this policy referred to an "entrepreneur-like" (Ball, 2007) vision of head teachers. In the Italian school autonomy context, paradoxically, a policy of promoting "isomorphism" (common values and competences) was used to produce "allomorphic" (Meyer and Rowan, 2006) results (different responses in each school).

The processes implemented opened the floor to a new managerialist discourse. The organization of the institutional training process (1999-2000), in fact, showed the intent to go beyond the rhetorical aspects of the innovation, and the outsourcing of the training processes was a meaningful means in this respect. The acquisition of the upgraded status by some 10,000 head teachers was a crucial aspect in the school autonomy reform and represented a sort of "privatization" *rehearsal* (Ball, 2007), where "non-educationalist" actors (Gunter, 2008) were also participating in the formation of new leaders. If the existing head teachers had to change into new autonomous heads, then – *just as frogs are changed into princes* – they would have to be 'kissed' by a new, all-round policy. In order to show itself as modern and 'appropriate' (March and Olsen, 1989) this policy ended up embracing the managerialist discourse and the quasi-marketisation of education, favouring competition between training agencies. The symbolic meaning of this choice should not be underestimated: although the impact

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<sup>3</sup> Following a longstanding tradition, a clear distinction was present between primary and secondary head teachers. In fact, in order to become head teacher a mainly legal knowledge was requested in addition to the professional expertise as teachers. Therefore, while primary school heads were leading schools benefiting from a psycho-pedagogical background, secondary school head teachers were influenced by a more subject-focused competence.

of this initiative on the 'core bureaucracy' was in fact limited, a new approach had been launched.

The training modules consisted of 300 hours, of which 150 hours were of lectures and 150 hours of independent learning, peer exchange and project development within schools. Lectures included both in presence and e-learning activities, which represented their ICT first experience for many elderly - but also younger - head teachers. New styles of routines and scripts for the «cognitive pillar» (Scott, 1995) were therefore introduced. Their implementation began in the following training activities which targeted new heads as well as teachers.

On this occasion, as a symbol of a decisive shift towards the marketisation of the public service, the longstanding Italian Ministry's tradition of self-organising internal training was interrupted. Once the general scheme for the contents of the course was outlined, in fact, the Ministry externalised the whole procedure. A call for tenders was launched for a total 263 courses all over Italy, each boarding about 40 of the 10,000 candidates. Eighteen training agencies and ad hoc consortia composed of both universities and private companies were successful and 89 clusters of courses were implemented<sup>4</sup>. Each agency prepared a project following the guidelines<sup>5</sup> set up by the Ministry and outlining both the contents and the organisation of the course (teaching, tutorship and the stages of practical or on-line training). Although formally sticking to the general framework, each successful agency interpreted the training project according to its own cultural background, or in terms of its own visions, or even ideologies, regarding the role of autonomous school heads. The whole scene became composite and hectic, both because of the different styles of the training agencies and because of the project types. Moreover, the large number of courses to be implemented in a short time led the organizers to appoint temporary training staff with a variety of backgrounds.

Table 1 shows the diversity of networks generated by training agencies/consortia following two dimensions of analysis. First, the sector of the agencies is considered, such as private, state (mostly universities)

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<sup>4</sup> The agencies/consortia could have been responsible for a different number of courses.

<sup>5</sup> The guidelines are very general, designing the framework for the total amount of hours and their division for subjects and between lectures, on-line sessions and the school project realised by each head. The Ministry established a committee for the evaluation of agencies' projects, in order to appreciate the degree of coherence, adequacy and innovation.

and mixed sectors. Second, the type of discourse on leadership is analysed, which inspired the courses provided, ranging from the managerialist to the professional discourses. The second dimension was analysed through a set of variables used as a proxy in order to understand the nature of the discourse on leadership (see above). Those agencies in which at least one state institution is present are less than half the total. Almost two thirds of the agencies/consortia adopted a managerial discourse. A low percentage of agencies adopted a mixed managerialist and professional discourse. A still lower percentage of providers adopted a more strictly professional discourse.

Table 2 reveals a high percentage (over 70%) of clusters of heads involved in the managerialist discourse. The 'managerial' agencies/consortia were, indeed, able to seize a proportionally bigger slice of the market of heads' training courses. Paradoxically, agencies/consortia in which state institutions participated were often the advocates of the managerialist discourse. The participation of the economic-technical departments of several universities, which cooperated with private organizations, is likely to have had an impact on this orientation.

*Table 1. Types of training providers by discourse.*

	<i>Managerialist</i>	<i>Manag. -Prof.</i>	<i>Professional</i>	<i>Tot.</i>	
Multi-sector Partnership *	4 (3)	3 (2)	3 (1)	10 (6)	55,6
Mono-sector Partnership	1	1		2	11,1
Single body**	6 (1)			6 (1)	33,3
<b>Tot.</b>	11 61,1	4 22,2	3 16,7	18 (7)	100

\* The number of partnerships with at least one state partner is in brackets.

\*\* The number of state bodies is in brackets.

Yet, social sciences departments (education, sociology, psychology) seemed to be less ready to respond to the challenges of the market. Trainers and lecturers in these subjects were often recruited individually by private or mixed consortia, rather than on behalf of their institutions. In a way, this event can be interpreted as a failure of the supporters of the professional discourse to contrast managerialist pressures.

This outsourcing process enhanced the creation of several partnerships, the result of which often produced a mixture of discourses, somewhat in contrast with the declared aims of creating a common cultural background of values for Italian heads. The majority of them, in fact, experienced the managerialist discourse. However, a few were welcomed in a training environment closer to the professional discourse, sometimes surrounded by an atmosphere of criticism towards the managerialist one. Others experienced both.

*Table 2. Number of clusters of courses provided by different types of training providers by discourse.*

	<i>Managerialist</i>	<i>Manag.- Prof.</i>	<i>Professional</i>	<i>Tot.</i>	
Multi-sector Partnership *	21	7	15	43	48,3
Mono-sector Partnership	8	4		12	13,5
Single body**	34			34	38,2
Tot.	63	11	15	89	
	70,8	12,4	16,8		100

It is also important to notice that to no extent was the training selective: all existing head teachers were upgraded. At the end of the process, despite the recommendations typical of Human Resources Management frameworks characterizing a wide section of the training contents, the managerial discourse was beaten: no assessment occurred and upgrading became automatic. The bureaucratic discourse with its most secure features and the professional discourse with its most corporative features produced an alliance that prevailed over the managerialist discourse. The ideas which had been presented to head teachers as the most effective and desirable, especially by the more managerialist agencies, could not be implemented and all that the new heads got was traditional training followed by a certificate, awarded automatically to all participants.

Thus, the 'mimesis' – from non-educational field to schools – of the institutional isomorphism was enhanced by the use of values and frames of the «normative and cognitive pillars». Furthermore, as described below, the out-sourcing of the training process was set to remain a stand-alone event,

since the Ministry brought the whole process back within its walls in the training initiatives following this initial upgrading.

*'New' headteachers and the comeback of 'old' discourses*

After the 2000 upgrading-training process, further heads had to be appointed to replace the retired ones. To date three new recruitments from the teaching profession have occurred, in 2002, 2004 and 2006. The 2002 and 2006 calls for applications were restricted to teachers who had been acting as heads for at least three years, while that of 2004 was open to all those who had been fully qualified teachers for more than seven years (Table 3).

Table 3. Open competitions for the position of school head in the years 2002, 2004, 2006.

<i>Competition per year</i>	<b>2002</b> <i>(restricted)</i>	<b>2004</b> <i>(ordinary)</i>	<b>2006</b> <i>(restricted)</i>
Number of seats in competition	1.500	1.500	1.458
Maximum number of successful applicants per competition	1.650	1.650	1.627
Applications presented	1.870	36.234*	2.900
Applicants admitted to the training course	More than 1.650	More than 1.650	2.400
Successful candidates	<b>1.500</b>	<b>1500</b>	<b>1.458</b>

\* 10.601 were admitted to the written test, after a selection by title, and 2.737 then proceeded to the oral test.

The framework of the 2000 training was maintained with minor amendments, but the Ministry kept the whole process in its hands, rather than outsourcing it. The training was only open to the successful candidates in the open competition, however. In the case of the restricted admission competitions, the number of applicants was predictable and low, given the requirements for application. Selection was limited and only a very small number of candidates were excluded from the training course and the successive appointment.

The 2004 ordinary call for applications had to handle some 36,234 applicants who underwent three selection steps, as prescribed by the legislation, however. In the first step, 10,601 were selected on the basis of their “curricula” (qualified experience) and could proceed to the written test, consisting of an essay, followed by an interview. 1,650 candidates (corresponding to the total number of available positions) were then fully successful and therefore admitted to the training course. These numbers evidence the opposite trend of the Italian education system, with respect to other EU countries (Earley and Weindling, 2004), as far as the appeal of headship is concerned. Indeed, there is no shortage of head teacher-candidates among teachers in Italy.

Moreover, these numbers give an idea of the significance of bureaucracy and “red tape” involved in dealing with such an enormous group of applicants. In fact the process proved to be extremely complex and a number of complaints and appeals emerged during its three-year long development. In a context where formalities and alleged guarantees inevitably played an important role - and were supported by the unions as well as by political alliances - it was not surprising to see the professional and bureaucratic discourses prevailing over the rhetoric of the managerialist discourse. While the Ministry kept responsibility for the organization of the training and the setting-up of its overall framework, experts and trainers had to be appointed to take care of the local implementation of activities, tackling some 5,000 participants in the three runs. In fact, the technical agency attached to the Ministry (INDIRE) was officially in charge of designing and implementing the on-line training package. Learning tools and materials were therefore the same for all participants and trainers had to stick to them without the freedom experienced by the training agencies involved in the first stage.

In order to run the centrally managed courses, individual experts were selected among academics, professionals and consultants with expertise in educational matters. They came from both the private and the public sectors and from a variety of backgrounds. In addition, experienced head teachers were appointed as tutors. A variety of methodological approaches and cultural and disciplinary orientations was fitted into what was intended to be a common framework, which resulted more overwhelming than in the previous stage, however, due to the Ministry’s centralized planning and organization. The new heads’ induction process was therefore run following the tradition of the bureaucratic-professional discourse in a

context highly dominated by bureaucratic constraints.

*Table 4. Dimensions\* of the process of training and recruitment in the ordinary course-competition for headship qualification (D.D.G. 22.11.2004).*

<i>Provider</i>	<i>INDIRE (external Agency of the Ministry of Education) through 20 Regional Directions which appoint "experts" as Coordinators of each course</i>
<i>Target Group</i>	Future heads, who have come through the selection process before the course, after three steps: titles evaluation, written and oral exams
<i>Aims</i>	Imparting knowledge and skills for the leadership of autonomous schools
<i>Contents</i>	Mandatory modules: The new scenario of the Italian education system (laws and norms) The profile and the role of the school head (responsibilities and skills) Administration and accounting; budgeting control; quality evaluation Project work; managing by objectives Communications and relations inside and outside the school School safety Information and communication technologies; basic English Additional modules The analysis of the external context of the school; networks and partnerships Educational planning and curricula
<i>Methods</i>	Blended course: lectures and lessons; case studies, simulations and problem solving; inter-networks and forums; school projects
<i>Pattern</i>	9 months: 160 hours of courses: 120 (60 through e-learning) for mandatory (compulsory) modules 40 (20 through e-learning) for additional ones 80 hours of practical training in a school with a final evaluation
<i>Status</i>	Mandatory; selection and training are interdependent: training cannot begin without a previous selection and must be concluded with a final selection (written and oral tests)
<i>Costs</i>	Unknown; financed by the state.

\* The dimensions refer to those of Huber and West, 2002.

In Table 4 some typical dimensions of Italian head teachers' recruitment and training are summarised, following Huber and West's (2002) grid of analysis, set up within a recent comparative study of different national systems. As shown in the Table 4, the Italian educational system is still characterized by a strong centralism for what concerns both the model of governance and the outlining of guidelines. Italy, to this extent, can be associated with other centralized European systems, such as those in France and Germany (Huber and West, 2002).

## Discussion

The school autonomy legislation that came into force at the end of the 1990s changed the role and responsibilities of Italian head teachers and introduced a new, compulsory framework for their recruitment and initial training. The way the Ministry's bureaucracy tackled the task of setting up the process of up-dating the existing heads to the requirements of the new legislation, and training those to be appointed within the autonomy scenario is an interesting example of the *ups and downs* of different and contrasting discourses in the educational realm. This article identifies the two different stages involved in the design of the new Italian head teachers:

- the trans-formation of the 10,000 in-service heads (1999-2000), when the legislation on school autonomy came into force;
- the recruitment-selection-training of new heads (2002, 2004, 2006).

In the first stage, the managerialist discourse gained a broad space in the training policies, while the bureaucratic and professional discourses clearly re-gained predominance in the second stage. The study, based on documentary analysis and interpreted through a neo-institutional approach, allows for a description of 'how' these two stages developed, by looking at the institutional forms of the training design.

An attempt to identify the 'why', underlying the 'how', should consider more analytically the role of actors (organized or not) and stakeholders, representing different powers, interests, and ideologies (Meyer and Rowan, 2006). This could be done by listening to the voices of actors in order to gain a deeper insight into the strategies, coalitions, networks and arrangements implemented. Capturing the core features of the "relational

contexts” (Gronn and Ribbins, 1996; Seddon, 1994) of educational leadership which accompanied this experience would be particularly useful to better understand its development.

Nevertheless, an attempt can be made to answer some questions about institutional path dependencies, the changes occurred and the way they were contrasted and even deleted. The first trans-formation stage was characterized by different manoeuvres and arrangements:

- a *coercitive isomorphism* (regulative pillar) which allows for the introduction of a common gateway for all head teachers; in this way Italy was following the international trend of stressing the significance of head teachers' competence emerging in several education systems;
- a *normative isomorphism* (normative pillar) which gave the floor to the managerialist discourse, stressing the values of entrepreneurship, accountability and competition and which pushed schools towards the business culture. In this way the school world welcomes 'non-educationalist' actors (Gunter, 2008) and a new market is created where private companies and managerial experts compete with traditional educational actors;
- a *mimetical allomorphism* (cognitive pillar) concerning head teachers' competences. Different modules that proposed a variety of contents, values and styles, sometimes even contradictory, despite their homogenising declared intent were in fact implemented.

Some explanation of the upsurge of the managerialist discourse in the first stage could be identified. Influenced by international institutions (the European Union promoting a 'knowledge society'; the OECD evaluating educational performances; etc.) and by Italian public opinion (sustained by entrepreneurs' associations and some political parties) the centre-left government promoted school autonomy as a post-welfarist strategy. The then Minister of Education, a representative of the major left-wing party, implemented the policy of head teachers' trans-formation on the one hand as a symbol of change and, on the other, as a device of delegating responsibilities (Newman, 2001). New schools needed new head teachers, inspired by managerial frames and entrepreneurial values. The world of non-educationalist actors was therefore co-opted. Besides its managerial competence, it could offer structures and means to support the Ministry and University Education faculties which had to deal with "trans-forming"

10,000 trainees in a short time<sup>6</sup>. Indeed, the pressure of the formal acknowledgement of new heads created a new landscape and the managerialist scenario became a symbol of the change. Even the Unions and the professional associations did not hesitate to support the idea of involving the business world in head teacher training. The attraction of the new status they would achieve through the course, in terms of both salary increases and up-grading, weakened most resistance. Moreover, both the Unions and the professional associations were interested in participating in the call for tenders to run some of the courses and did not perceive the private agencies as possible competitors, since the broadness of opportunities made available by the large number of courses to be implemented left room for all applicants. Thus the Ministry bureaucracy could maintain a crucial role: on the one hand it was still keeping the entire process under control, by being responsible for the selection of tenders and the evaluation of their work; on the other many higher level bureaucrats and ministry inspectors were appointed as experts by the private agencies running the courses. Meanwhile, although participants in the process, the Universities and their academic staff specialized in educational matters lost their traditional role of sole actors on the scene of educational professional training. In short: the dramatic change introduced by the school autonomy reform was strategically accompanied by a process of formation of new leaders which had to leave a broad space to the values, institutions and the most significant interpreters of the managerialist discourse.

The second stage, where further groups of new head teachers had to be selected and trained, met with a somewhat different scenario, however. Where new institutional forms consistent with the school autonomy framework were expected, once again the prevalence of bureaucratic and professional discourses became evident. In fact, the following arrangements were adopted:

- the gateway course was maintained for all aspiring head teachers, but the successful applicants were selected in advance from a very large number of candidates, in accordance with the regulations typical of the public administration (internal 'coercitive' isomorphism);

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<sup>6</sup> That of head teachers' practices is of course a different issue. Research shows however how leading an autonomous school in Italy is to many extents different from what it was before school autonomy came into force (Fischer, Fischer and Masuelli, 2002).

- the training process was centralized and implemented at the regional ministry level; tutors were appointed from among in-service expert head teachers by the regional directorate; all courses, partly blended, were organized by an external agency of the ministry and were based on the same set of learning strategies, tools and materials; the monitoring was conducted by the agency itself (internal 'normative' and 'mimetic' isomorphism);
- the managerialist discourse had almost vanished, although the ministry bureaucracy (external 'residual' allomorphism) appointed a small number of managerial interpreters individually.

Some explanations regarding the dis-empowerment of the managerialist discourse and the comeback of the bureaucratic and professional discourses can be identified. Political changes in the Government had an impact on the whole process (centre-right followed by centre-left executives). The focus of the political agenda shifted to different issues, mainly the organization of learning cycles and the curriculum. Meanwhile the public opinion, as well as political parties and the most representative entrepreneurs' associations, which had been the most active sponsors of the managerialist discourse, shifted the focus of their concern from school organization and performance to the shrinking of the role of the state and the enhancement of private schools<sup>7</sup>. Alongside this, the ministerial bureaucratic power reappeared and took control of the field, by implementing a centralised standardised selection and training process. The Unions and the professional associations also regained their roles as prime actors in the process of negotiating (both formally and informally) rules, procedures, resources, expert recruitment, evaluation committees, etc.,. These negotiations consequently also included the monitoring and the 'surveillance' of the selection process along its development. Finally, it should be considered that the majority of the head teachers continue to feel at ease (Fischer, Fischer and Masuelli, 2002) in the comfortable shell of a bureaucratic world, with its values, rules and traditional routines and

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<sup>7</sup> In Italy the Catholic Church exerts significant pressures in this direction, although it does not fully adhere to some values proper of the managerialism such as competition and selection.

therefore have a more or less overtly sympathetic view of the ministerial establishment<sup>8</sup>.

Further research should be undertaken in order to better describe and understand the path dependencies and networks of the Italian education system. The reasons why the managerialist discourse is still defeated by the resistance of the professional and bureaucratic discourses should be investigated.

In the terms of the managerialist discourse itself, 'resistance' to change can be seen. In a way, from a critical perspective, this resistance may be considered as a useful means of helping the Italian system not to fall into the traps of the neo-liberal adoption of the managerial discourse. This would acknowledge the specificity of the Italian structure and clarify why, beside the new elements introduced by the managerialist discourse, aspects of another 'new' discourse seem to emerge, i.e. the 'democratic-critical' discourse<sup>9</sup>, raising issues of equity and citizenship that are in contradiction with any idea of students' commodification and schools' competitiveness (Woods, 2005). Rather than a mere regret for 'old' discourses, this resistance may therefore represent potentialities for the emergence of «new forms of democratically accountable school leadership» (Grace, 1995, p. 200). Should this be the case, a new perspective would appear, consistent with the 'emergence' of a neo-professionalism (Whitty, 2002), far from the managerial discourses interested in bringing down the spirit of professionalism (Olssen, Codd and O'Neill, 2004). These are issues for further research, however.

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<sup>8</sup> The issue of head teachers' evaluation is particularly emblematic in this sense, as far as Italian educational policies are not able to deal with it even if ten years have passed since the renewal of head teachers role.

<sup>9</sup> Traits of the "democratic-critical" discourse, however, are difficult to identify since this discourse has many "souls" (Grace, 1995).

in Italian as "Leadership educativa in Italia: oltre il "discorso" burocratico", *Rivista trimestrale di scienza dell'amministrazione scolastica*, (parte prima), 2007, n. 2; (parte seconda), 2008, n. 1.

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