

## **The transformation of the Education State in Italy: a critical policy historiography from 1944 to 2011**

*Emiliano Grimaldi*<sup>1</sup> and *Roberto Serpieri*<sup>2</sup>

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*Abstract:* This article attempts to reconstruct the main trends of educational policy-making in Italy since 1944, contextualizing them within historical and wider social landscapes. It is an exercise of critical policy historiography, in so far as it explores what have been the main issues in the Italian education policy debate during the last sixty-five years, how they have been addressed, what has changed both in the debate and in policy-making, what are the complexities and who are the subjects that have benefited or have been disadvantaged by those arrangements. The work interprets the recent trajectory of the Italian education system identifying two different political eras, namely the era of the welfarist education state and the (re)building of the nation and the era of the restructuring of education, between managerialism, decentralisation and a tentative neoliberalism. Whereas the former (1944-1990) witnessed the building up of the welfarist and centralized education system, the latter is still an open era, where multiple trials are in place to reform and modernize education matching temperate and radical interpretations of managerialist, neoliberal and Third Way recipes.

*Keywords:* education politics, policy-making, political era, critical policy historiography, Italy

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<sup>1</sup>Dep. of Sociology, University Federico, Napoli, Italy. E-mail: emilianogrimaldi@gmail.com

<sup>2</sup>Dep. of Sociology, University Federico II, Napoli, Italy. E-mail: profrobertoserpieri@gmail.com

### Introduction<sup>3</sup>

Since the late '1990s, the Italian education system has lived an intense, tormented and painful epoch of reforms and radical changes. Such an epoch has started with the introduction of school autonomy and decentralisation and has culminated in the effort of the current conservative government to redraw the deeper 'texture' of Italian education according to the 'classical' neoliberal recipes of marketization, standardisation and managerialism (Grimaldi and Serpieri, 2010). These 'contested' reforms come after, and somehow are the product of, a long period of 'non-decision making' (Benadusi, 1989). In the second half of the last century, the traits of the post-war welfarist education system, once shaped, have remained 'untouched'. The highly conflicting dynamics between the powerful actors populating the arenas of the *context of influence* (Bowe *et al.*, 1992, p. 19) have provoked a substantial 'impossibility' to translate 'new' education policy ideas into reforming acts and/or ground-breaking policy programs.

This article attempts to reconstruct the main trends of educational policy-making in Italy since 1944, with a specific reference to the 6-18 years olds' education (i.e. from primary to high secondary school). It contextualizes the identified trends within historical and wider social (Jessop, 2002). This work is an exercise of *critical policy historiography* (Gale, 2001, p. 385), in so far as it explores what have been the main issues in the Italian education policy debate during the last sixty-five years, how they have been addressed, what has changed both in the debate and in policy-making, what are the complexities and who are the subjects that have benefited or have been disadvantaged by those arrangements. Using as sources of data documents, government policy

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<sup>3</sup> The reflections presented in the article are the outcome of the joint collaboration of both the authors. However, in order to ascribe responsibility, Roberto Serpieri wrote the § "The era of the restructuring of education: between managerialism, decentralisation and a tentative neoliberalism (1990 – nowadays)", while Emiliano Grimaldi is the author of the § "The Italian Welfarist Education State: (re)building the nation through mass education (1944-1990)". The Introduction and the Conclusion paragraphs are co-authored.

texts, commissioned researches and academic literature, the work tries to interpret the recent trajectory of the Italian education system identifying ‘temporary [hegemonic] policy settlements [and] moving discursive frames that at a particular historical and geographical moment define the specifics of policy production’ (*ibid.*, p. 386). Recognizing the contested nature of the educational field, such a reconstruction focuses on both those hegemonic settlements and discourses and the dialectics between them and their opposites, looking at the struggles between ‘new’ and ‘old’ discourses, the mediations of structural path dependencies (Ball, 2007, p. 6), the emergence of crises and other settlements ‘in waiting’ (Gale, 2001, p. 386).

In pursuing such an objective, the article draws on the heuristic concept of *political era* from the *analytical framework for policy engagement* proposed by Hodgson and Spours, (2006, p. 684). A *political era* is intended here as “a period of politics and policy-making [that is] framed by [...] underlying societal shifts and historical trends which affect the ‘shape’ of the education [...] system, dominant political ideology which affects the parameters for reform, and national and international education debates which either support or contest the dominant ideology” (*ibid.*, p. 686).

The analysis led to the identification of two different political eras in the recent history of Italian educational policy-making, namely the era of the welfarist education state and the building of the nation; the era of the restructuring of education: between managerialism, decentralisation and a tentative neoliberalism. The following sections of the work are dedicated to a description of each era that is both analytical and narrative. Analytically, the descriptions have been structured trying to make visible the complex interplay between a plurality of elements and factors influencing and influenced by educational policy making in each era. Two main dimensions have been highlighted.

First, the article addresses the ideologies struggling to structure the discursive domains of politics and policy-making in diverse policy fields, setting the values and the aims to be pursued, the problems to be addressed, the strategies and the solutions to be used. A specific reference will be made to the

international and national education debates, that were structuring, in a Foucauldian sense, the educational *domains of validity, normativity and actuality* (Foucault, 1972, p. 68). These domains are the frameworks of meaning within which truth and falsehood of any policy statement is discussed, certain statements are excluded or marginalized as well as policy problems and their solutions are thought and enacted by education policy-makers and professionals. Then, in describing each educational era, a close attention will be paid to the consensus and the controversies around the aims of education, the structuring of the curriculum, the knowledge to be imparted to learners, the ways learning has to be assessed, the level of participation to be pursued. Regarding each of the above points, the dominant discourses have been focused on, highlighting at the same time their opposites (Ball, 2006).

Second, the organisational arrangements of education will be examined, shedding light on the intertwining between different levels and arenas of educational governance. Governance settlements will be analyzed focusing on the main actors/players of the *Education State*, on what *political spaces* were opened for who (Hodgson and Spours, 2006, p. 687), on the shape of power relations in the education field (Bourdieu and Wacquant, 1992, p. 94). In particular, the shifting balances between the centre and periphery will be discussed, shedding light on site-based management of schools and decentralisation as main features of the restructuring of the education state.

The following political eras' descriptions have also a narrative structure, in so far as they try to disentangle the paradoxical coexistence of continuity and discontinuity in the educational policy-making of the explored periods of time. In doing so, they identify phases, shifts and crucial moments of rupture and discontinuity, along with the common traits defining each political era. Moreover, those descriptions focus on the changes in the alignment and dis-alignment between the arenas constituting the *contexts of policy influence*, those of *policy texts production* and the *context(s) of practice* (i.e. the contexts of policy enactment) (Bowe *et al.*, 1992; Ball, 1994). Such a choice allows the bringing to light of the dialectical interplay between reproductive and transformative forces and pressures influencing the shaping of the Education

State, its subjectivities and practices, its processes and outcomes.

**The Italian Welfarist Education State: (re)building the nation through mass education (1944 – 1990)**

After the Second World War, Italy was a nation to be re-built. The twenty years of Fascism and the war had undermined democratic and institutional life, whereas the economic field was undergoing a deep crisis. An authoritarian structure of the State and a highly corporative economy were the main fascism's heritage. Moreover, a significant divide between the advantaged northern and the disadvantaged southern parts of the country was recognizable, looking at the basic social and economic indicators such as economic production and GDP, unemployment, illiteracy and political participation. Given this scenario, the 1950s and 1960s witnessed the 'Italian economic miracle' (Crafts and Toniolo, 1996) and the progressive structuring of a fordist economy and mode of production. Thanks also to the Marshall Plan, the Italian governments adopted Keynesian economic policies, fostering demand and occupation, which led to the construction of a peculiar form of welfare state (see Ferrera, 1984; 1996 on the Mediterranean Welfare State Model).

Education was given a primary role in this process of nation (re)building, but it was at the same time a highly contested field where different ideologies confronted each others (Semeraro, 1996). As it happened in other European countries, the main divide was between *liberals* who advocated a non interventionist State in education and *social-democrats* who claimed for policies of public and mass education (Olssen et al., 2004). The former interpreted education as a private good, whereas the latter looked at education as both an emancipatory means for lower classes and a policy lever to avoid unemployment and develop political and cultural participation (the main reference was Dewey and his works on education for democracy – Dewey, 1916). However, the Italian debate on education showed two peculiar traits. First, the Catholic Church played a significant role in the education debate, and

more generally in the political life of the country. Since the nineteenth century, Catholic Church had run many private schools that acted as agencies of catholic evangelism and catechesis. In the education debate, the position of such a powerful actor often converged with the liberals' one, asking for a non interventionist State in education, public funding to private schools and choice policies. As it will become clear later, given the dualistic nature of the Italian education system, i.e. a public system with a parallel and well-rooted system of mainly religious private schools, in some policy cycles it is possible to recognize a partial convergence between the liberal (and later neoliberal) and the Catholic Church recipes on education governance, i.e. quasi-marketization, choice policies, introduction of voucher, per capita funding, same status to public and private schools, State funding to private schools.

A second peculiar trait of the Italian debate on education was represented by the somehow hidden and underlying influence exerted by the idealist philosophical tradition on the works of many liberal and social-democratic intellectuals and policy-makers acting in the field of education. The main evidence of such a philosophical heritage was to be found in the resistances to abandon dualisms such as culture and labour, education and vocational training, mass education and the education of the ruling elites and, finally, humanistic and scientific knowledge.

The education debate and agenda setting were mainly shaped by some highly influential actors. Political parties and their intellectuals played a major role. The *Democratic-Christian* party, for instance, dominated the Italian political scene since the 1948 and was influenced by the overt and hidden lobbying made by the Catholic hierarchies. Top civil servants of educational bureaucracies were also powerful actors in education policy-making, influencing the translation-in-practice of central policies. In the transition between the fascist and the republican era, there was a significant continuity in the hierarchies of public administration. Then, most of the top civil servants still had a conservative disposition and showed to be against those reforming initiative aiming at changing the selective and elitist fascist school system. Finally, the education debate on issues such as curriculum, teaching and

learning was dominated by a pedagogical expertise mainly oriented by idealism and/or liberalism. A weak voice was represented, on the contrary, by teachers professional associations, which appeared on the stage in the 50s, the unions whose influence increased only in the 60s and those bottom-up movements, which only and suddenly emerged on the scene in the late 60s.

The Constituent Assembly (1946-48) was the first institutional arena where, after the war, those positions confronted and clashed each others. A compromise emerged that was fixed in the articles 33 and 34 of the Italian Constitution:

Art. 33

Arts and science are free and free is the teaching of them.

The Italian Republic set out the principles in the field of education and establish public schools for each grade of schooling.

Privates have the right to open schools without any burden for the State.

The Italian Law, in defining the rights and the obligations of private schools which ask for the same status of public schools, has to guarantee freedom to private schools and an equal treatment to their students in comparison with the public schools' students.

[...]

Art. 34

School is open to all. Primary education is compulsory for at least 8 years and is free.

Good and deserving students, even if deprived, have the right to reach the highest grades of educational career.

The Italian Republic makes actual this right with grants, child benefits and others economic aids, that have to be allocated through open competitions.

(Costituzione della Repubblica Italiana [Constitution of the Italian Republic], 1948).

Clearly, the values and principles stated in the Italian Constitution resemble a social-democratic discourse on education. Equity and social justice are

identified as the main values to be pursued. Public education is interpreted as both a lever of social mobility and the most important means to counterbalance inequalities and help students with less cultural, economic and social resources. Moreover, the emphasis on mass education recalls the primary role given to education in the (re)building of the nation after the Fascist authoritarian era, solving problems such as unemployment, illiteracy, political and cultural exclusion, and fostering development. Behind the welfarist-like compromise fixed in the Constitution, however, a conflicting debate developed in the decade between 1944 and the 60s around the scope and aims of education, the social function the school system had to play in the country, the education governance settlements to be pursued.

The idealist position in defense of a selective and elite-shaping education system was still strong and widespread, paradoxically also in the social democratic political field. Its champions hardly struggled to defend the elite-privileging status quo of the school system. Moreover they influentially argued against any reforming initiative, in the name of the defense of ‘high culture’.

The definition of a new national curriculum was also a contested field. Liberals and idealists tried to defend the supremacy of humanism and ‘Culture’ (with the capital C) on science, technology and any other kind of ‘applied knowledge’ and to inscribe such a hierarchical divide in the design of educational careers and pathways. Social democrats, on the contrary, claimed for a curriculum that balanced humanism and science, tradition and technology, culture and learning to labour. The liberal/idealist perspective prevailed. The same did not happen in the case of governance settlements. The governance and funding issues remained unsolved, even if a pluralist compromise seemed to emerge that guaranteed funding and a relative degree of autonomy to Catholic and private schools within the welfarist and centralized education state. The control devices enacted by the central educational inspectorate on private schools largely concerned issues of formal rather than substantial control.

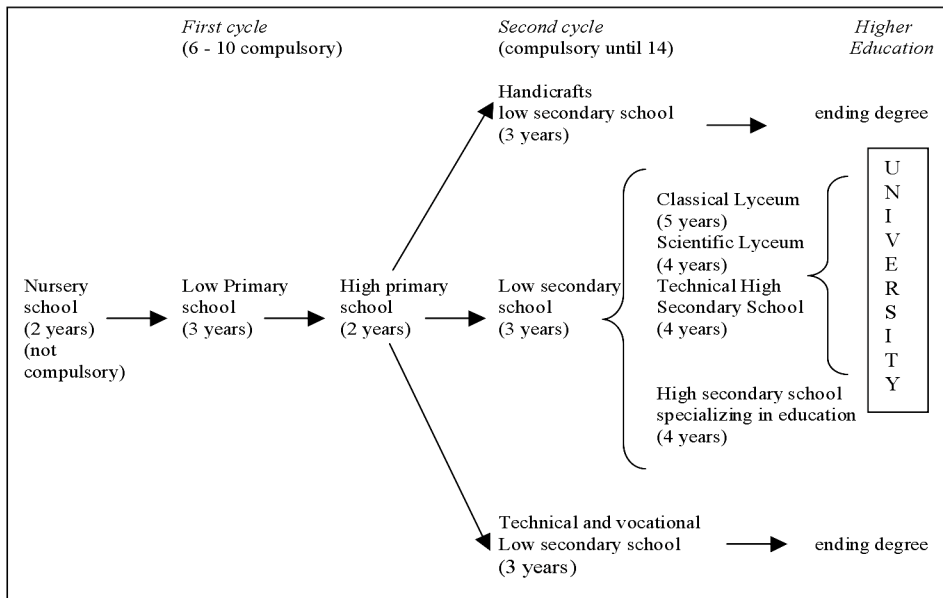
In terms of governance structure, the Italian education system was highly centralized and bureaucratic. The *Ministry of Public Education* was the main



decisional centre of the system and controlled both human and financial resources, also through its local bureaucracies. A *National Council of Public Education* composed by elected members had advisory functions, being it a centre of proposal rather than decision. Schools and their head teachers were directly linked to the central Ministry, the only meso-level governance being the *Provincial School Councils* provided with bureaucratic functions. At the same time, a great degree of professional autonomy was guaranteed to head teachers and teachers. The bureaucratic and centralized administration provided the organizational context (a professional bureaucracy in Mintzberg's terms) in which educational professionals had the freedom to exercise their professional judgement in the delivery of public education.

Moreover, the design of the school system remained substantially unchanged until the 60s and the structure of the highly selective system outlined by the idealist philosopher Gentile in 1929 during the fascist era was left untouched. In Figure 1 the main traits of the Italian education system from 1944 to 1962 are summarized.

Figure 1. The Italian Education System from 1948 to 1962



The school system was structured in three key stages: primary (6 to 10), low secondary (11 to 13) and high secondary education (13 to 18). Education was compulsory until 14 years old, independently of the degree achieved. Whereas primary education was a common one, the system started to differentiate and track at year 10, when the children and/or their families had to choose between handicrafts or technical and vocational schools leading to an ending degree and low-income jobs or the low secondary school, giving access to high secondary school and more career possibilities. A further tracking step was the choice of high secondary school. The system offered four main choices, that were clearly hierarchically ordered: 1) the most prestigious Classical Lyceum, which had the mission to educate the ruling class of the country; 2) the Scientific Lyceum, which was considered less prestigious given the widespread idealist assumption about the inferior status of scientific knowledge; 3) a Technical School, focused on applied scientific knowledge, and 4) an High Secondary School specializing in education (*Scuola Magistrale*). The Lyceums gave the access to all Universities, whereas Technical Schools opened only scientific universities and the *Scuola Magistrale* led to an ending degree to be employed as a teacher in primary and low secondary schools.

#### **Four cycles of policy making**

Exploring the main education policy-making initiatives promoted in the political era of the creation of the Italian Welfarist Education State (i.e. from 1944 to the early 90s), it is possible to identify four main policy cycles. The main traits of each cycle are briefly described below.

**Ten years of Democratic-Christian government: laying the foundations of a welfarist education state through ordinary administration (1948 – 1957)**

After the establishment of the Italian Constitution and its principles on public education, the decade 1948- 1957 seems to represent a phase of apparent stasis for the Italian education policy-making. The Democratic-Christian governments mainly governed the system guaranteeing the ordinary administration and acted on two policy levels: developing and enhancing public education and funding and supporting private (mainly catholic) schools. No significant reforms were enacted, but the regulative foundations of a welfarist education state were laid. According to the egalitarian emphasis of the Constitution, compulsory education was widened. Moreover, a void was filled through the definition of a national professional statute of teachers (it took two years, from 1955 to 1957). The reforming of the national curricula was the main issue of the debate. Small changes concerning single school segments were enacted, coming out as compromises after long periods of discussion and bargaining. Nonetheless, nothing significant changed, due to harshness of the political struggle and the clash between different and incompatible positions. Many voices came from conservative and progressive pedagogists and intellectuals, discussing on the need to preserve or democratize the traditional and authoritarian pedagogies. Economists asked for a more strict connection between education and the transformations in the economic field and the labour markets. Catholic intellectuals urged on politicians to further confessionalize the curriculum. The social democrats' voices were highly fragmented, being divided between idealists, pragmatists asking for a democratic education, and those who contested the division between culture and science, instruction and vocational learning. Economic elites claimed for a reinforcement of the scientific subjects in the curricula against the idealist view underlying the Italian school. However, jurists were the dominant voice and their vocabulary acted as the main code of translation, given the need to recode any proposal and idea in terms of formal regulation.

**The centre-left reforms (1957-1967)**

The decade from 1957 to 1967 was a more intense season of reforms (effectively enacted or failed). A trait of continuity with the previous years is represented by the impossibility for governments to approve any reform through parliamentary legislation. As a result, the school system was modified step by step using governmental decrees and administrative acts rather than through national laws. To a certain extent, this practice of government created a lack in terms of democratic accountability.

The 1962 was the year of the first real reform of the system. The tri-partite low secondary school was unified and made compulsory. The egalitarian positions claiming for the need to bring all students to achieve some basic educational results prevailed in the debate against those who defended the status quo, advocating an early tracking step at year 10 in order to differentiate educational pathways. Moreover, the State committed itself in guaranteeing education for free to all students and supporting the disadvantaged students. The curriculum of the new secondary school was re-shaped, with the scope to adapt the contents of teaching to the needs of the new economic environment and the development of the new fordist mode of production. Once again, the new curriculum came out of a decision-making process developed around the dualism between scientific and labour-oriented knowledge and the resistances in defense of the humanistic tradition of the idealist Italian School.

This was also the main trait of the debate started in 1963 on the need to reform the secondary school. This time, the progressive voices and those coming from the professional associations played for the first time a significant role. It is not a case that the issues were the reinforcement of science education, the pedagogical democratization and the creation of a more pluralistic and open school, the modernising of the curriculum (not linked to the past but looking towards the future), the adoption of new pedagogies, new methodologies and new contents for learning (Semeraro, 1996, p. 179). Notwithstanding, those actors were not able to create a sufficient alignment around their proposals and the debate did not result in any reform and or significant change in high

secondary schooling.

### **The 1968 divide and the efforts to democratize the Italian school system (1968-1979)**

The 1968 global movement of students and progressive teachers was highly influential also in Italy (Della Porta, 2006). New educational issues burst on the scene from the bottom and, maybe for the first time since 1944, part of the education policy agenda was set outside the political sphere. Students and teachers broke in the debate asking for: a) compulsory education until 16; b) the renewing of pedagogies and a more progressive interpretation of the role of teachers; c) the creation of public nursery schools, free compulsory and for all; d) a more equity-oriented reform of high secondary education that overcame the hierarchical ordering between Lyceums and technical schools; e) the valuing of science, technical and vocational education. Then, what (re)emerged was the gramscian call for a ‘unified intellectual and technological school’ (Gramsci, 2002, p. 71) that was more democratic in its governance, pedagogies and curricula.

The government reacted to students’ movements with an authoritarian turn. Repression and police were the main responses to students’ protests within universities and schools, whereas no political answer was given to their requests. Nonetheless, the call for a democratization of the still highly authoritarian structure of the Italian system grew more and more, involving students, teachers, unions, professional associations and large parts of the civil society. Students and teachers increasingly asked for more participation and democracy within schools, arguing against the centralized and bureaucratic control imposed by the government through the chain Ministry-bureaucracies-head teachers. The initial response of the centre-right government was to resist to those requests, using once again repression and intensifying the use of the hierarchical chain of command and the focus on discipline. Notwithstanding, the time was ripe for a reform of school governance and the pressures coming

from the civil society became so intense that political parties could not ignore them any more. In fact, in 1974 the government issued the so called *Decreti Delegati*. Those legislative acts reformed in a more democratic fashion the school governing bodies, recognized an unified professional status to all the teachers and created decentred regional agencies whose aim was to promote, in a bottom-up way, teaching innovation, pedagogic research and professional development in schools. The *Decreti Delegati* opened an intense, but short, season of activism and participation within schools, with teachers and parents who tried to actually take part of the schools life and contribute to their strategic choices, their organization and managing. But the changes introduced and the room for manoeuvre opened by the *Decreti Delegati* were not enough deep and wide to counterbalance the authoritarian and centralistic path dependencies of the school system. After few years it became clear that the whole governance of the system had not changed. The new 'participative' bodies remained overwhelmed by the strongly hierarchical and centralistic chain of command and the regional agencies witnessed a bureaucratic turn. As a result, the initial enthusiastic participation and trust in the possibilities opened by the reform decreased and the new democratic school bodies became more and more ritualistic spaces of participation.

In the face of a chaotic debate and administrative action by the governments (a huge production of regulations and juridical texts), the idealist elitist model of schooling still survived.

### **The 1980s and the silent reform of high secondary school (1980-1992)**

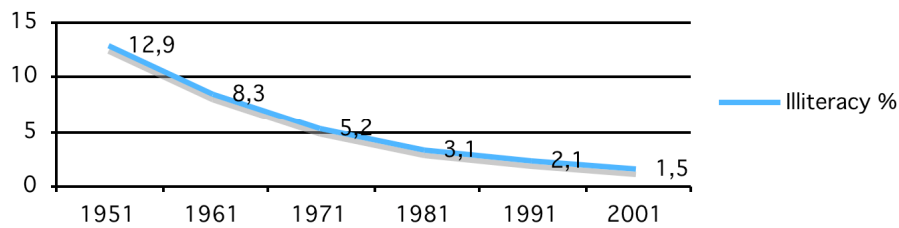
The 1980s were the years of the silent reform of high secondary school. Due to the continuing political instability and the conflicting positions within the governments themselves on education, high secondary school was transformed through small changes to curricula, administrative acts and the logic of pilot innovation programs (Benadusi, 1989).

The education debate itself witnessed a significant shift on the issues concerning the structure and the contents of high secondary curricula. The balance between the historically dominant idealist positions and the more progressive ones changed, due to: a) the first pressures coming from international agencies (*i.e.* OECD) and institutions (EU) for a reform of education according to the changing economic scenario; b) the requests made by the social movements of the previous decade; and c) the pressures coming from the changing economic, social and political landscape itself. Between the end of the 1970s and the 1980s many changes were promoted in the school curricula aiming at overcoming the idealist divide between culture with the capital C and applied knowledge and promoting a less traditional understanding of curriculum and teaching, structured through the definition of objectives and educational goals rather than through the listing of contents. Moreover, at least in regulation and policy documents, a shift took place from a disciplinary to a multidisciplinary perspective in the planning of teaching activities. Nonetheless, once again such a change occurred through a top-down innovation process where the teachers and students (that in theory should be the main actors of any change in schooling) were treated as pure implementers. The reforms of the curriculum took systematically place through the launch of pilot programs (for instance the trial of a new curriculum) via administrative acts and its extension, year after year, to an increasing number of schools. The 1980s represent a significant decade for education policy in Italy also because of the signing of the Second Concordat between the Italian Republic and the Catholic Church (1984-85), that modernized the contents of the previous one, regulating in a new fashion and extending the teaching of catholic religion in the public and private schools.

It is not easy to draw a coherent picture of the education policy outcomes of the welfarist era. The emerging portrait of the Italian school system is complex, multifarious and even paradoxical. The objective of (re)building the nation through education has been partially achieved and the public school system has played a significant role in the construction of a more equal and less polarized society. Participation in education grew significantly in forty years. For

instance, in 1981 the 72% of young people attended a high secondary school, compared with the 9,8% in 1951, and 25% started a university course (Ginsborg, 1998). As figure 2 shows, this wider participation produced a great decrease in illiteracy.

Figure 2. The decrease of illiteracy in Italy. 1951 - 2001



Source: Dei, 2007.

Moreover, the welfarist education system had a key role in enhancing social mobility, given the achievement of higher educational qualifications by an increasing number of youths (see Table 1).

Table 1. Population by educational degree in Italy. 1951 - 2001

Educational degree	Years					
	1951	1961	1971	1981	1991	2001
University degree	1,0	1,3	1,8	2,8	3,8	7,4
High Secondary School	3,3	4,3	6,9	11,5	18,6	25,9
Low Secondary School	5,9	9,6	14,7	23,8	30,7	30,1
Primary School	59,0	60,5	44,3	40,6	32,5	25,4
No Degree	30,8	24,3	32,3	21,3	14,4	11,2
Tot.	100,0	100,0	100,0	100,0	100,0	100,0

Source: ISTAT (Italian National Institute of Statistics), 2001.



Although these indubitable successes in the spreading of basic education, the Italian school kept its selective function in the highest grades of education, where it partially continued to act as an instrument of the elites and high-middle classes (Semeraro, 1996). In the 70s many young people still remained out of the post-compulsory education and, more generally, the dynamics of educational access in Italy only witnessed a ‘slow decline of inequalities’ (Barone, et al., 2010).

The persisting of significant educational inequalities and the only partial success of the welfarist project was as well due to a lack of resources coming from the central state: a) to support the educational chances for disadvantaged students through grants and financial aids; b) to improve the quality of technical and vocational education; c) to sustain teachers’ professional development; d) to create a system of public (and free) nursery schools helping lower classes in the schooling of their children. The outcomes of those political choices were different depending on the geographical area. In many central and northern regions historically governed by the left parties local governments tried to compensate for such a lacking investing local resources in education. The same did not happen in many other regions (mainly the southern ones) and this phenomenon enhanced the already significant divide existing between the North and the South of the Country, extending social inequalities.

The hierarchical and centralized mode of governance also had significant implications. During the 50 years of the welfarist era, centralization and the bureaucratic and centralist disposition of educational administration ‘had always been able to limit and constrain the most innovative and relevant aspects of any reform, being them structural or curricular’ (Semeraro, 1996, p. 199). The educational system showed a great capacity to absorb the reforming initiatives and boosts coming from civil society, professional communities and students, ‘defusing’ their transformational potentials. This resistance to innovation could be considered as one of the causes contributing to reproduce the educational system’s still unequal character. It had not the systemic capacity to innovate teaching and pedagogies to answer to lower classes educational need and, more generally, to answer to the new educational needs

students had in the changing scenarios of the post-welfarist society. This co-determined the high rates of educational failure to be found among the lower classes and constrained the potential of education in the enhancing of social mobility. Moreover, the combination between the high degree of centralisation and the complexity and opacity of the administrative chains through which decision-making developed generated a 'loss of responsibility' (Semeraro, 1996, p. 220).

A further heritage was left to the education policy-makers who governed the system in the 1990s, that is the persistence of a divide between the public education system and an extended and multifarious system of private schools, mainly religious ones, partially outside a substantial control of the State.

### **The era of the restructuring of education: between managerialism, decentralisation and a tentative neoliberalism (1990 – nowadays)**

*The 1990s stand-by: between welfarist legacies and the emergence of new discourses*

The two decades straddling the new millennium witness a complex and hybridizing process of restructuring of Italian education. However, two different phases can be depicted: 1) the 1990s until the 1997 school autonomy reform; 2) from the autonomy reform to nowadays.

The first phase is characterized by the interplay between the welfarist legacies and the ongoing affirmation of new discourses of teaching, learning and educational governance tightly or loosely inspired by the neoliberal and third way discursive constellations.

In fact, the 1990s open with a relevant institutional change: the 1990 reform of primary school. It could be interpreted as the inscription within the regulation of innovative and progressive educational principles and practices experimented since the 1970s after the *Decreto Delegati* reform. The pedagogical setting was largely inspired by the thought of scholars such as

Bruner and Piaget and endorsed democratic, child-centred and emancipatory presuppositions. In a social-constructivist fashion and in a sharp contrast to an idealist conception of education as a transmission of knowledge, education was re-interpreted as a co-operative process of research. Resembling welfarist values and ideas, interdisciplinarity, diversity and equality were affirmed as the keywords inspiring the 'new' Italian primary school. A new didactic-organisational settlement was established, introducing three teachers every two-classes. The new settlement was inspired by some successful experiences of all-day (extended day) school (*Tempo Pieno*), that since the late 1970s challenged the previous traditional organisation grounded on the 'one teacher-one class' model.

In contrast to other European countries, the Italian system was still lacking of a secondary schooling reform. This was due to the intertwining of different factors. During all the decade, different reforming plans confronted each other, producing an unsolved debate. On the one hand, welfarism-inspired actors supported a comprehensive project, aiming at blurring the divide between lyceums and vocational education and promoting equal educational chances for all. On the other hand, neoliberal actors claimed for a restructuring project mainly driven by the labour-market urgent new needs, stressing specialisation and the above mentioned divide. Moreover, political instability and the weakness of governments also contributed to the non decision-making (Benadusi, 1989). However, some spaces of innovation in secondary schooling were widening, thanks to: a) the opening of a new season of centrally-driven pilot projects aiming at experimenting new curricula and practices of secondary schooling; b) the translation of the European discursive pressures towards a much more labour-market oriented education into funding programs for secondary schooling curriculum innovation, especially in the field of vocational education.

During the 1990s, the Italian policy agenda was also widely influenced by the global critics to welfarism. The huge Italian public debt and the political crisis of 1992, resulting from the discovering of widespread practices of corruption, created an alignment between political will and public opinion

around some key arguments of the neoliberal discourse, that progressively entered in the Italian educational agenda. Of course, the pervasive influence of European and transnational agencies (OECD, World Bank, IMF, and so on) policies played a major role in this process. The controversial action of the centre-left and conservative governments also contributed.

The aims of education were progressively reframed, thanks to the entering of neoliberal, managerialist and Third Way discursive pressures and devices, that gave birth to a war of discourses (Serpieri, 2009). First, the conceptual and at the same time ideological frame of the human capital theory played a major role in setting the agenda of the economic competitiveness for European countries in a globalized polycscape. The pressures exerted by European Union and other international agencies made issues such as lifelong learning, the decrease of early school leaving and improvements in students results and so on more and more urgent and unavoidable. The ongoing setting of international standards of comparison provoked the designing of national education policies influenced by the logic of benchmarking, although in Italy the evaluation fashion has been a matter of political rhetoric rather than translated into actually functioning devices, as it will be shown later.

#### *The 1997 reform: school autonomy and decentralisation*

After a decade of intense debate and political upheaval, the Italian public administration was widely restructured in the late 1990s. Finally, reforms were launched by a centre-left government that, in a Third Way fashion, endorsed neoliberal recipes but, at the same time, tried to temperate them to avoid the polarization of the school system, the harshness of competition among schools and the inequalities that could come out of market regulation. The reforms emerged from a complex interplay between the 'new' neoliberal discourse on the restructuring of welfarist education and the 'old' welfarist discourse. Moreover, they were mediated by welfarist path dependencies (Grimaldi, Serpieri, 2010).

In 1997 the Italian education system was significantly reformed. Partially following the neo-liberal recipe (Olssen *et al.*, 2004), the restructuring of the

education system was carried out by a centre-left government on the basis of a peculiar mix of relative site-based management, devolution and localism (Grimaldi, Serpieri, 2010). The reformers' aim was to overcome the welfarist configuration, judged as ineffective and overburdening.

One of the aims of the reformers was to establish a new institutional structure granting autonomy to each school (Legge n. 59/1997), within the framework of a soft decentralisation (Benadusi, and Serpieri, 2000; Serpieri, 2008; Grimaldi, 2010). The school autonomy reform loosened the hierarchical relationship between the Ministry of Education and schools. The former kept hold of the general governance of the system, outlining general principles of education and establishing threshold performance levels besides defining the national curricula and managing financial and professional resources through its regional administrative offices. The latter were no longer seen as mere providers of a service, following central guidelines on administrative and curricular issues. On the contrary, new spaces of autonomy were opened up for schools. Firstly, they became entitled to outline the annual educational school plan (POF), within which they can plan individual/distinctive school projects, define local curricular priorities and outline at least in part their internal organisation. Secondly, schools were strongly encouraged to build partnerships with other public and private actors, in order to pursue their educational mission. Partnerships were explicitly identified as a potential channel through which to gain public or private extra-resources and enrich the educational provision.

School autonomy and the transformation of the role played by centralised education bureaucracies («from rowing to steering», borrowing the famous Osborne and Gabler (1992) expression) was coupled with a strong emphasis on localism (Newman, 2001), that is, on the need to involve local authorities and communities in the governance of education at the local level. Regions and Local Governments therefore became responsible for local educational planning and school buildings, and their competence in educational matters and professional training improved (1998-2001). In this perspective, the “School Autonomy Regulations” (Legislative Decree No. 275/99) strongly stressed the

possibility for schools to constitute networks with other schools and public or private actors in order to pursue their educational aims.

The reading of the Italian case is not easy and reveals a messy scenario. Although the major changes introduced by the 1997 reform, the distinguishing feature of the Italian case can be identified in the presence of several counteracting trends and forces that opposed, often in contradictory ways, the reform project based on autonomy and devolution (Grimaldi, and Landri, 2006). Ten years after the introduction of the reform, many experts and practitioners (Armone, and Visocchi, 2005; Ribolzi, 2006; Fisher et al., 2002) highlight how it has had only limited effects. Many expectations created by the new framework were not met and change was less relevant than foreseen. Comparative analyses in the EU area show how the Italian form of autonomy is weak (Eurydice, 2007) and how perhaps head teachers' roles and responsibilities have been the area of major impact.

*The new head teacher (1997 – 2000)*

The renewal of the head teachers' role was a central step in the «formation» of the new autonomous schools. The award of autonomous status for each school occurred simultaneously with the higher civil servant ranking given to their head teachers (they were previously ranked in the middle management category). The new ranking was granted in relation to the participation in training activities that involved some 10000 in-service head teachers in 2000 (Serpieri, 2009). Before outlining the main characteristics of the «new head teacher», we would like to highlight the historical tradition of the Italian education system and the related path dependencies. This should show both how the reformers aimed to introduce radical changes and also explain the contradictory picture that emerged from the reform's implementation.

Since the Republic was founded in 1948, educational staff has been selected through open competitions, in as far as they were regarded as part of the civil service. Head teachers, in particular, had to be previous and qualified teachers winning a selective competition held in Rome (now in the regional offices). In the welfarist and centralized Italian system, schools were regarded as State

bodies and head teachers were the terminals of a hierarchical chain connecting each school to the central Ministry of Education. In this context the head teachers' role was forged by two different discourses. On the one hand, head teachers were socialised to practices, values and ethics of bureaucracies, in as far as they were required to follow rules and procedures defined centrally (mainly through ministerial guidelines) and were subject to forms of bureaucratic accountability. On the other, head teachers were previous teachers and were required to coordinate the educational staff working in their schools, using a professional logic. In this respect, some of the most important professional groups promoted an interpretation of the head teacher as a «*primus inter pares*» among teachers. The professional dimension was emphasized even further after the enacting of the 1974 *Decreti Delegati* that changed the model of governance in the schools (see above). To sum up, we could say that in the pre-autonomy system, therefore, political and administrative groups promoted understandings and practising of headship mainly inspired by a bureaucratic discourse. At the same time, on the other hand the bureaucratic structure of the school system 'provided the organisational context in which head teachers could exercise their professional judgement' (Newman, 1998; see also Mintzberg, 1983).

Within this context, the policies promoted after 1997 strongly renewed the role of head teachers by defining new practices and procedures associated with the role-taking and promotion of values and ethics mainly inspired by the New Public Management. The ruling of schools by an external bureaucratic hierarchy and the headship practices associated with it were identified as one of the main problems affecting Italian schools. As Luigi Berlinguer, Ministry of Education, stated:

The centralistic structure had overburdened head teachers with bureaucratic tasks and duties, while the autonomous school needs head teachers who are able to assume responsibilities, plan and implement new projects and activities, organise and stimulate teachers' work, listen to pupils, involve families, manage resources and interact with external actors (Berlinguer, 2001, pp. 111-112).

It is worth noticing here how, at the discursive level, practices, values and ethics associated with bureaucratism were identified as constraining and ineffective. The main traits of the 'new head teacher' were redefined in the regulations on the basis of the New Public Management recipe: emphasis on the managerial aspects of headship; responsibility for the results obtained; efficiency and effectiveness in the management of resources (whether financial or human); entrepreneurship. Professional issues simply disappeared (Barzanò, 2011).

In relation to the internal governance of the autonomous schools, head teachers were depicted by the regulations as managers whose main functions relate to guidance, coordination and improvement of financial and human resources, on the one hand, while on the other, these functions concern responsibility for the results gained by their schools (1998). As part of a new moral environment, responsibility, efficiency and effectiveness were clearly identified as the main values that should guide head teachers' practices in order to improve the 'quality of the education provision'. As already occurred in other countries, the design of the new heads was part of a wider process of devolution of responsibility for schools' improvement towards the schools themselves (Evans *et al.*, 2005). A more efficient and effective management was identified as one of the internal factors that could influence schools' performances.

Entrepreneurship was, instead, the main value inspiring the design of the external duties and tasks of the new head teachers. As far as devolution and localism were central traits of the autonomy reform, head teachers were identified as key actors of the new devolved arenas. Following formal regulations, on the one hand they should attend to the «required relations» with local authorities and peripheral bureaucracies. On the other, head teachers should be the main promoters of partnerships and collaboration with 'institutional, cultural, social and economic groups existing in the school area' (1999). The new head teacher potentially became an «entrepreneur» with several imperatives. In order to maintain a sufficient number of pupils he/she has to make his/her school attractive for students, but mainly for their parents.



The loss of students means fewer teachers and the risk of losing the autonomous status. To avoid these risks, the head teacher should seek to enrich the educational provision of the school, by getting additional funding for extra-curricular activities. As a consequence, he/she should dedicate a considerable amount of time to promoting external relations with local authorities and other public and private actors. In such context, the development of entrepreneurial skills becomes a necessity, while competition and customer-oriented ethos turn out to be new hidden values (Whitty, 2002). This could also be an initial step of a “privatisation” process (Ball, 2007) within the Italian school system.

As in the case of the triad «autonomy, devolution and localism», managerialism encountered strong opposition. Bureaucratic path dependencies and the hostility of the main professional unions and groups, as well as the relative weakness of the managerial discourse, resulted in a messy scenario where contrasting evidences lead to the enactment of changes in different directions. The messiness was considerably amplified by Italy’s political instability. After the 2001 election, the new centre-right government changed the agenda on education drastically and focused on the reform of the national curriculum. At the same time, it showed scarce interest in the issues of autonomy, devolution and localism and left a significant space to bureaucracies in governing the change enacted by the previous government. Some elements working against the shift towards managerialism need to be highlighted, however.

First, central and peripheral bureaucracies still exerted a strong influence on the internal governance of the schools. It is true that head teachers do not depend on the peripheral hierarchy of the Ministry anymore. Nonetheless, schools’ financial autonomy continued to be strongly constrained by central regulations. The issue of human resources management was even more complex. Head teachers could not (and still cannot) recruit or hire either teachers or other personnel, who are assigned to the school by the Ministry’s regional offices. They only had power over the general rules of behaviour within the school, the teaching activities being under the direct responsibility of the teachers. Further, head teachers were responsible for the independent

negotiation of the school with the Unions about aspects such as professional development and school organisation.

Second, head teachers exercised their powers in a framework of internal governance that, as far as democratic and professional involvement is concerned, had been left almost untouched, the structure of internal decision-making not having been changed (Serpieri, 2008).

Third, the same resistances were recognisable as far as the external tasks of the new «entrepreneur-like» head teacher are concerned. As stated above, the combined effects of different policies pushed head teachers towards an ethic of competition and fund-raising, thereby partially changing their practices. Nonetheless, the resilience of routines, bureaucratic constraints and ideological opposition played an important role in this respect as well.

### **A ‘radical’ neoliberal turn?**

It is in the last decade, however, that the neoliberal agenda has permanently entered the Italian system and its holy principles have been put at the centre of the education debate. Since 2001 conservative Ministers of Education have tried to introduce neoliberal reforms promoting cost-cutting, standardization and evaluation policies as well as mechanisms of competitive schools funding. If many of the reforms promoted have not been fully implemented yet, due to a chronic political instability, the construction of a new moral environment has been stressed (and accomplished in some degree). The following quotations taken from parliamentary acts or press releases mirror the kind of statements that have dominated the contemporary education debate in Italy. In 2008 a member of the conservative government wrote in a parliamentary act:

We face the challenge to re-allocate the financial resources in education focusing on parents’ choice and according to the principle that fair governmental funding follows the pupil. [What we need is] the connection between schools’ financial autonomy and the freedom of choice for parents. Families have to move school funding through their

choices (Aprea, 2008a).

The Anglo Saxon reforming experiences were supposed to be the model to be followed:

A liberal and subsidiary reform based on three pillars, i.e. school autonomy, freedom of choice and renewal of teaching profession, would allow us to come closer to the more advanced educational systems, the Anglo-Saxon ones [...]. Those are countries that have high quality performances, thanks to systems based on a strong culture of evaluation and responsibility (Aprea, 2008b).

On the wave of the international prominence of the OECD-PISA tests, the need for a new culture of evaluation has been strongly emphasized. Whereas the national agency for evaluation (INVALSI) has pushed on the ongoing creation of a standardised system of students performance appraisal, Ministers, influential private Foundations and their Think Tanks have proposed to publish national 'schools league tables' and to use those data to evaluate schools or to allocate funding.

At the same time neoliberal fashionable key themes have been put at the centre of the pedagogical debate, such as meritocracy, excellence, individuals' and families' responsibility for education, parents', blaming of ineffective schools and teachers. In 2008 the Minister of Education Maria Stella Gelmini declared:

Authority, hierarchy, teaching, studying, hard work and merit. These are the key words of the school we want to create, dismantling that ideological construction made of empty pedagogism that has infected like a virus the Italian school since 1968 [...]. What we want is a school that teaches our pupils how to read, write and 'do sums' (Gelmini, 2008).

Equality has been also proposed as a 'negative value', being it against merit and valuing of individual capacities:

The dominant role of the State and the centralized planning have implied the marginalisation of meritocracy in the last fifty years. Merit has never become the guiding principle regulating economic and work processes, and a formal equality has prevailed. As a matter of fact, the consequence has been a strong discouragement of individual capacity (Aprea, 2008b).

Regardless of these efforts, the enactment of neoliberal policies has encountered strong resistances within and outside school. In this respect, the Italian education system has been defined as being at the centre of a war of discourses (Serpieri, 2009). Teachers' unions and left parties have played a major role in challenging the new orthodoxy in the political and public debate. Their opposition has been strongly mediated by welfarist legacies (ibidem), consisting in most cases in the effort to defend the status quo rather than to develop critical alternatives.

## **Conclusion**

This article has traced the main trends and changes in the trajectory of the Italian education system in the last 75 years, identifying two main *political eras* (Hodgson, Spours, 2006): the *Welfarist Era* (1944 – 1992) and the *Era of the restructuring of education, between managerialism, decentralisation and a tentative neoliberalism* (1992 – nowadays) and focusing on the how and why of policy change. Each era has been depicted highlighting the main issues setting the education debate, describing the configuration of the system and its changes, focusing on the main actors influencing education policy-making and, finally, presenting the main policy cycles enacted.

The detailed description of the two eras of the Italian education policy-making allows the outlining of some analyses and arguments about the two-way connections between the hegemonic governance settlements and the discursive frames influencing the education policy-making and its change.

The dynamics of the ‘welfarist era’ could be partially interpreted looking at the hegemonic governance settlement sustaining the unfolding of the educational discourse: a centre-left governmental coalition dominated by the catholic inspired Democratic-Christian Party; three main Unions enacting a corporatist dynamic regarding staff employment and, especially, teachers’ recruitment, selection and formation; the ministerial bureaucracy, that has exerted a tight control (centrally and locally) on schools, with special regard to the respect of formal rules and staff issues. Such enduring and hegemonic governance settlement made of complex relationships of political interdependences, could be argued to have contributed to the structuring of the *domains of validity, normativity and actuality* within which the education policy-making developed in the welfarist era, leading to:

- the hybridisation between a conception interpreting education as a means to preserve the established social order and viewing school as a selective device, and a conception espousing mass education benefits and implying a social mobility project;
- a centralistic and authoritarian understanding of state agency paradoxically coupled with a democratic and participative professional governance.

The interplay between these political dynamics and this discursive frame made unthinkable issues such as systemic and individual performances evaluation, the treating of professionals as human resources and the adoption of the other ‘how-to-do’ managerialist devices (even though during the 1980s other western countries were strongly influenced by these ‘new’ educational discourses). It also hindered the entering of ‘outsider’ actors in the realm of education.

A new landscape of education policy-making started to emerge in the 1990s, giving birth to what has been called the ‘*era of the restructuring of education*’. However, it has been a highly contested process. While the isomorphic neoliberal pressures from transnational institutions and agencies increased, the welfarist path dependencies still limited deep processes of policy borrowing. Indeed, the analysis offers a picture of an education system which is undergoing trials of neoliberal and managerialist restructuring enacted

through systemic reforms, after a long political era where governments had not enough power and internal cohesion to deliver reforming plans and changes were slowly introduced through administrative action.

The reforming policy cycles came out and are still influenced by a harsh clash between the welfarist discourses, Third-way inspired ideals and the fascinating neoliberal recipes on education governance, the scope of education and the role of the state in terms of domains of validity, normativity and actuality. Idealist discursive path dependencies, indeed, actually played a significant role, hybridizing both the welfarist and the neoliberal discourses. A complex discursive landscape emerged where the concerns for equity, mass and citizenship education and education as an empowering practice for the enhancement of social mobility confronted and clashed with the new economic imperatives bearing upon the education system. Such imperatives implied the subjugation of the educational aims to the requests of the labour markets and the hidden return of an elite and selective view of educational aims.

It is not only the discursive definition of the objectives of education that is under (re)construction, but also its modes of governing and the whole structure of the education system. In fact, the political scenario deeply changed. The argument made here is that such hybridisation was the result of the success of the centre-left coalition on the political scene after the breakthrough between the *First and Second Republics*. However, other powerful actors of the welfarist settlement, the Unions, did not witness any relevant attack, preserving their influential voice, especially about public sector staff issues.

The 1997 reforms have created a *centralised decentralisation* (Karlsen, 2000), where the State still exerted a strong influence on local authorities and schools through the definition of the national curriculum, the control of human and financial resources and, finally, the exercise of its general regulative powers. This has partially limited the clash of competitive dynamics between schools and local systems, but also inhibited the exploitation of the democratic and bottom-up potentials inherent in a collaborative reading of school autonomy. Nonetheless, de zoning national policies and the choice policies

promoted by regional and local governments have created local education quasi-markets, and a consequent polarization of local education systems.

After the centre-left government which promoted the autonomy reform, a new centre-right coalition started to dominate the Italian political scenario and we suggest such a change as one of the main factors of the re-launching of more radical neoliberal education policies, coupled with the intensification of the pressures of global discourses and international agencies for 'convergent policies'. In addition, the strong alliance between the unions and the other actors constituting the corporatist block was deeply weakened. In the field of education, in particular, new independent unions grew up, as a result of both the incapacity to meet professionals' demands by the national unions and the spreading of new discursive nuances such as meritocracy and career differentiation.

These are clearly some of the symptoms for a new key role of a neoliberal discursive ensemble which paradoxically co-opted at the same time non educationalist actors (Gunter, 2008) and neo-centralistic interests and enforced their claims in the education debate. Whereas the re-launch of a 'somewhat' neoliberal reforming project and the urgency of the economic crisis have made the expenditure cuts the main stream of intervention. In Italy increasing efforts are also in progress to break up the historical taboo of evaluation. A systemic project for the establishment of a national evaluation system has been introduced to: a) measure students performances and achievements through standardized national tests; b) evaluate schools and head teachers through the matching of tests data and inspection results; c) evaluate teachers and provide incentives to the best ones. All these policies are still in progress and at a piloting stage. However, they have been announced through and accompanied by media campaigns of schools and teachers' *blaming and shaming* that pointed out to the public opinion their resistances against evaluation. A new shift is clearly recognisable towards a *governing-by-numbers* mode of educational governance.

Whereas researches and data are available that make evident the successes and failures of the welfarist project to (re)build a more equal society through

mass education, it is much more difficult to outline the outcomes of the recent and ongoing restructuring of the education system in terms of equity. The available data show how the decline of educational inequalities is slow and significant differences in terms of educational achievements can still be found between regions and local areas, but also within the same school (Giancola, 2009; Barone *et al.*, 2010).

The Italian education system seems to be in the middle of a radical transformation of its deeper texture. The war of discourses around the future directions to be undertaken is still harsh and professionals, students and social movements oppose and strongly resist the new neoliberal wave. Hints can be seen of a policy trend driving education towards its subjugation to the capitalist logic of global competitiveness and economic growth. However, spaces of thought and action are still open for (re)discovering wider meanings for education and establish education itself as the privileged field where to lay the knowledge bases for thinking alternative future societies.

#### **Endnotes**

1. Catholic Church has always exerted a significant influence on education policy in Italy, exploiting its ascendancy on public opinion as a political resource. An evidence of such a political power can be found in what was formalized in the First Concordat in 1929 signed by Mussolini and the Pope. The Concordat established that 'the teaching of the principles of catholic doctrine is the basis and the crowning achievement of education' and it introduced catholic religion as a curricular subject in any kind of public and private school.

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