

Contributions of Stephen J. Ball to the research on educational and curriculum policies in Brazil

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This article aims at showcasing the main contributions of Stephen J. Ball to educational research in Brazil, particularly to the study of educational and curriculum policies. We also highlight some of the limitations in the incorporation of Ball's ideas in Brazil as well as some of the challenges that these author's ideas pose to Brazilian researchers. The article points out to the ability of Ball's work to inspire a critical analysis of educational and curriculum policies and of the outcomes and consequences of these policies to different social classes. Due to the richness and depth of Ball's work, the article indicates that it would be crucial for Brazilian researchers to explore a wider variety of Ball's texts, with the goal of understanding how he operates with the concepts and theories and how he develops his analyses. This task would also contribute to a better quality of research in Brazil, particularly for those researchers that already have been using Ball's work as a reference.

Keywords: Stephen J. Ball; educational research; educational policy

The vast scholarship of Stephen J. Ball has been providing theoretical and methodological elements that have proven potent enough to support analyses and research in different areas of the educational field. For example, Miranda (2011), referring to the policy cycle approach, argues that Ball has offered a 'toolbox' for the analysis of educational policy. Ball's concepts are, indeed, broad and sophisticated and, in fact, can be used not only by the ones interested in educational policy and sociology of education, but by researchers from a variety of other fields.

The aim of this paper is to present the contributions of Stephen J. Ball for the research in education in Brazil, particularly for the study of educational and curriculum policies. We first offer a brief history of educational research in Brazil, as well as of the specific research in the fields of educational policy and curriculum. We then present the main contributions of Ball's work to these fields and explore some limitations and challenges in the use of this sociologist's ideas by Brazilian researchers.

Educational research in Brazil: a brief panorama

According to Gatti (1987) and Santos and Azevedo (2009), educational research in Brazil began to develop, in a more systematic and regular way, in the 1930s, with the establishment of the National Institute of Educational Studies and Research (INEP), in 1937. This Institute spawned the Brazilian Centre for Educational Research (CBPE) and Regional Research Centres, established in the states of Rio Grande do Sul, São Paulo, Bahia and Minas Gerais, which contributed to a significant increment in educational research in Brazil.

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In addition, other factors contributed to the expansion of educational research in Brazil, such as: (a) the creation of the Brazilian Society for the Advancement of Science (SBPC) in 1948; (b) the creation of CAPES (Coordination for the Improvement of Higher Education) and CNPq (National Council for Scientific and Technological Development), in 1951, agencies that support and fund research and postgraduate programmes; (c) the creation of Postgraduate Programmes in Education, starting at the end of the 1960s; (d) the creation of scientific associations and entities, such as ANPEd (National Association of Postgraduate Programmes and Research in Education) in 1976; (e) the creation of specialized academic journals in education, starting in the 1970s. Today, the vast majority of educational research in Brazil takes place in postgraduate programmes (Master's and Doctorate). Currently, Brazil has 142 Postgraduate Programmes in Education, of which 62 are Master's and Doctoral, 58 are Master's only and 22 are Professional Master's. The *Revista Brasileira de Estudos Pedagógicos* (Brazilian Journal of Pedagogical Studies), established in 1944 by the National Institute of Educational Studies and Research, can be considered the first Brazilian educational journal. In the 1970s, a number of journals were created and published without interruption to this day, such as: *Cadernos de Pesquisa* since 1971, *Educação UFSM* since 1974, *Educação & Realidade* since 1976, *Educar em Revista* since 1977. Currently, there are approximately 200 educational journals in Brazil.

As a specific field of study, the research about educational policies is a relatively recent phenomenon in Brazil. According to Gomez Campo and Tenti Fanfani (1989), a factor that contributes to structuring a field of study is the existence of professional associations and its publications, periodicals, technical and scientific meetings, among others. According to Suasnabar and Palamidessi, the establishment of a university chair or a department are moments of institutionalization of a field, something that reveals the historical process of configuration and development of agencies specializing in the production, circulation and/or validation of knowledge (Suasnabar and Palamidessi 2007, 41). Thus, one can consider that the institutionalization of this field began in the end of the 1960s, when the use of the term 'educational policy' started to emerge in titles of theses, dissertations, books, articles and official publications as well as when the National Association of School Administration Professors was created, in 1961. The association is now called *Associação Nacional de Política e Administração da Educação* (National Association of Educational Policy and Administration – ANPAE).

In Brazil, up until the mid-1940s, the studies that are now called educational policy studies used to fall under the categories of 'School Administration', 'Educational Planning' or even 'Comparative Education'. Therefore, one can view these areas as precursors of what is now called 'educational policy'.

Up until the 1940s, the publications dealing with all the issues related to educational policy prioritized data analysis and systematization over the educational situation in the country in terms of school availability, failure rates, school reform, educational laws, school funding and teachers' salaries. From the 1940s onwards, even though the theme around the state of education remained in the spotlight, more systematic research started on education in general and, in this context, on educational policies.

In general, research on educational policies carried out until the 1970s was marked by linear models of analyses. According to Sander (1995), the work produced in the area of Educational Administration (until the end of the 1960s) fit within a 'technocratic approach' in administration, and it was inspired by the classic administration view (Sander 1995; Drabach and Mousquer 2009). Starting in the 1980s, with the redemocratization of the country, the studies in the field began to incorporate theoretical frameworks that were based in critical analyses of educational policies and of social and educational reality. Currently, the field of educational policy in Brazil is characterized by a significant expansion

that can be measured by the increasing numbers of research groups focusing on educational policy in most of Postgraduate Programmes in Education, the increment in peer-reviewed articles and books focusing on educational policies, the publication of specialized journals, specific research networks and scientific conferences. According to CAPES, in 2009, 63 (67.7%) of the 93 Postgraduate Programmes in Education evaluated in that year had research groups investigating educational policy.

In terms of curriculum research, Lopes and Macedo (2010) indicate that the interest in the field started in the 1920s. From the 1920s to the 1980s, the field was marked by 'instrumental transferring of American theorization' (Lopes and Macedo 2010, 13). According to the authors, this transfer 'was centred on the assimilation of models, mainly functionalist, for curriculum building and was implemented through bilateral agreements between the Brazilian and the United States governments, as part of the aid program to Latin America' (2010, 13). Starting in the 1980s, with the redemocratization of Brazil, a Marxist trend as well as texts connected to the 'New Sociology of Education' gain momentum in the Brazilian curricular thought. From the 1990s onwards, the study of curriculum incorporated a clear sociological approach. Thus, the studies that focused merely on the administrative facet of the curriculum were almost completely abandoned (Lopes and Macedo 2010). Also, according to Lopes and Macedo (2010), the following research areas were strengthened from the end of the 1980s onward: (a) investigations using post-structuralist approaches; (b) investigations and discussions focusing on curriculum and knowledge in networks; (c) studies about curriculum history and the establishment of school knowledge.

Much as in the educational policy field, the curriculum field has also been expanding with the increase in research groups, specialized journals and the creation, in 2011, of the Associação Brasileira de Currículo (Brazilian Curriculum Society) – AbdC.

The use of Stephen J. Ball's ideas in Brazil

The ideas of Stephen J. Ball started to be applied by Brazilian scholars at the end of the 1990s (Nogueira 1998; Ferreira 2000; Morgado 2003; Santos 2004). These scholars quoted Ball's texts addressing parents' choice, discourse recontextualization, micropolitics of school and the policy cycle approach.

Currently, Ball's ideas are being employed by researchers of different Brazilian universities. His work has gained attention particularly due to the dissemination of the policy cycle approach. Nevertheless, Ball's ideas about performativity, policy as text and policy as discourse, discursive change, micropolitics, the role of social and political networks in policy building and the participation of the private sector in public education are also some of the themes being investigated.

For this article, we conducted a survey of all the published texts using Ball's ideas, and we found 128 texts using these concepts: 1 book, 12 chapters, 40 journal articles, 26 doctoral theses and 49 Master's dissertations, between 1998 and 2013. A significant part of these texts utilizes the policy cycle approach as the research's theoretical/methodological framework. The complete list can be obtained at <http://www.pitangui.uepg.br/gppepe/downloads.php>. It is important to mention that 17 texts by Stephen J. Ball and 3 interviews are available in Brazilian Portuguese.

The policy cycle approach, explicitly explained in Bowe, Ball, and Gold (1992); Ball (1994); Ball, Maguire and Braun (2012), began to be utilized by Brazilian researchers in the 2000s (Lopes 2002, 2004, 2006; Morgado 2003; Destro 2004; Oliveira and Destro 2005; Lopes and Macedo 2006; Macedo 2006; Mainardes 2006; Santos and Vieira 2006). Currently, this approach is widely disseminated among Brazilian researchers and has been positively influencing the research in educational and curriculum policy.

Generally speaking, one can consider that the policy cycle has contributed to improve the quality of research on educational and curriculum policies in Brazil, especially because it provided the foundation for a more complex analysis (contexts of influence, of text production and practice). It also inspired an analysis that regards the school and social spaces as meaning-producing locales, as places of creation and recreation of policy and not mere sites where policies are implemented. Furthermore, the policy cycle approach has been contributing to overcome the premise that claims that rearticulations only occur when policy reaches schools. The policy cycle approach requires that the researcher focuses on these rearticulations and disputes in each of the contexts, from the moment the policy is being created, through text production, to the enactment of the policy in the local sphere.

In the case of educational policy research, we should highlight the fact that the literature in Portuguese about the theoretical/methodological frameworks used to analyse policy is still limited. Therefore, the publication of translations of Stephen J. Ball's texts, of his interviews and of papers dealing with the policy cycle approach has been crucial to the consolidation of this approach as a solid perspective to policy analysis. As mentioned before, a significant part of the research on educational policy had been adopting linear models of analysis, based on the sequence of policy agenda, formulation, implementation and evaluation. The dissemination of the policy cycle approach has allowed policy researchers to problematize these models, strengthening the thesis that policies should be understood as texts and as discourse and that official policies are never merely 'implemented'; they are always interpreted, translated and recreated throughout the policy cycle. Furthermore, the use of this approach has led researchers to investigate policy texts more thoroughly and critically. It also meant that researchers are more attentive to the context of influence (global, national and local) and to the historical nature of the investigated policies.

In terms of curriculum studies, the policy cycle approach, as well as the concepts of performativity, discursive change, representation, secondary adjustments etc., have been instrumental to the significant advances in curriculum research. According to Lopes and Macedo (2011), the policy cycle approach has provided the basis for challenging the top down and bottom up approaches in curriculum. In the research studies being carried out at the State University of Rio de Janeiro, Ball's ideas have been employed alongside with the concept of hybridism and the contributions of Laclau and Mouffe. To Lopes and Macedo (2011), the concept of hybridism allows for a less linear use of the relationships among contexts. Furthermore, the authors indicate that they have been 'looking for theorizing the policy game more meticulously, aiming at better understanding the constraints and negotiations at play when subjects are involved in policy making. This implies that one has to contend with the core sociological debate between structure and agency' (Lopes and Macedo 2011, 274).

As we showed above, one can conclude that Ball's ideas have greatly contributed to add new layers to and complexify educational scholarship in Brazil. Nevertheless, some limitations in the use of Ball's ideas and some challenges can be identified.

Some limitations and challenges

A first limitation is the fact that the majority of Brazilian researchers utilizing Ball's work had only access to his texts translated into Portuguese or Spanish and to the work of his commentators writing in Portuguese. Ball's scholarship is vast, and there are only a handful of texts available in Portuguese and Spanish; making reference to only those texts represents a limited use of this author's work. Also, the policy cycle approach is only one aspect of Stephen J. Ball's contribution to the field of sociology of education and educational policy.

Besides strengthening the policy cycle methodological approach, Ball has been developing a dense theoretical framework that includes concepts such as: performativity, new managerialism, parents' choice, education reform, political networks in the making of policy, education privatization, among others. In his more recent texts, Ball has been pointing out to the role of policy networks in the formulation of policies and to the changing nature of the state in contemporary society. In several texts, Ball (Gewirtz and Ball 2000; Ball 2005; Ball 2010) have been showing that the welfare state is being replaced by a managerial state, deepening the connection of this state to the private sector and nongovernmental organizations. The consequences of this transformation to educational policies are significant, and they have changed the role of education, of schools and schooling, constituting what has been called 'the end of the education era' (Tuschling and Engemann 2006; apud Ball 2010). Ball (2005) also highlights that the technologies of comparison, measurement and accountability, which are rapidly propagating in the educational systems around the world, have been changing the meaning of teaching and what it means to teach, the way teachers think and conduct their work and how they relate to their colleagues and students.

Therefore, the lack of widespread English language proficiency among Brazilian researchers has limited, in part, the use of Ball's work to the available Portuguese translations. Furthermore, the existence of Portuguese translations almost exclusively in the areas of the policy cycle approach, and performativity has been a limitation for the wider use of Stephen J. Ball's work in Brazil.

A second limitation is closely related to the first. In formulating the policy cycle approach, Ball indicated that his work was based in a post-structuralist perspective. More recently, Ball (2007) stated that his work on privatization involves the use of a variety of analytical tools to understand, interpret and begin to explain the phenomenon. These instruments are of three types and are employed self-consciously and as an attempt to create a theoretical framework that is 'ontologically flexible and epistemologically pluralist (Sibeon 2004) and a set of analytical concepts which are potent and malleable' (Ball 2007, 1). Ball (2007) indicates that such concepts are discursive, structural and interpretative and that these allow for an exploration of the complex social, economic and discursive interactions without assuming the predominance of one of them. Ball has also pointed out that his research is based upon policy sociology, in which sociological concepts, ideas and research are used as tools to make sense of the policy. In some cases, these ideas and concepts are heuristic devices and not 'definitive accounts of "how things are" but methods for thinking about "how things may be"' (Ball, 2008, 4). From the epistemological point of view, Ball's current research, based on pluralism, makes the use of concepts of authors from different epistemological perspectives possible and also allows for the incorporation of questions that are essential to the understanding of current policies, such as the change in the role of the state and the public/private relations. The policy enactment theory (Ball, Maguire and Braun 2012) lays the foundations to the analysis of the context of practice, expanding the ideas that were included in the initial texts dealing with the policy cycle. One of the central ideas of the policy enactment theory is that policies are made by and for teachers; they are the actors and objects of policies, and therefore, the context of practice represents a central focus of analysis in policy research. It is in the context of practice that policies make sense, in which they are 'mediated and struggled over, and sometimes ignored' (Ball, Maguire and Braun 2012, 3). As it has been shown, the ideal arrangement would be for researchers who utilize Ball's framework to follow closely the developments in his line of thinking, incorporating his current ideas and positions. Not incorporating these recent developments in Ball's framework creates a serious limitation in the use of his work in research that is based on his previous work.

A third limitation in the Brazilian studies is the absence or limited consideration of the role of the state in policy research. In his recent work, Ball has been examining the changes in the role of the state and its relations to current formulation of educational policies, particularly in his study of neoliberalism and the connections of the public sector with the private sector. The state has not been sufficiently problematized in the research on policy and bringing some of the most recent work of Stephen J. Ball to the discussion would highly benefit this research.

A fourth limitation concerns Ball's defence of a reflexive and critical use of theories. In some cases, Ball's policy cycle approach and other concepts have been used without this reflexive and critical position. In such circumstances, Ball's contributions seem to be employed merely as a methodological procedure, without the incorporation of the larger theory that calls for a complex and critical approach in the analysis. The policy cycle approach highlights the need to examine the results/effects of policy and their consequences to different social classes. Ball (1994) distinguishes between what he calls first and second order effects. The first order effects refer to the changes in practice or in the structure and are evident in specific locales or in the system as a whole. The second order effects refer to the impact of these changes in the patterns of social access, opportunities and social justice. This means that the researchers who use the policy cycle approach are challenged to investigate the different policies outcomes to actors of different social classes. The policy cycle approach combined with Ball's current developments offer potent elements to a critical analysis of educational policy. Ball questions the neoliberal, privatization-oriented and excluding model of current policies in the United Kingdom and elsewhere and demonstrates apprehension with the consequences (positive and negative) of the current educational policy to different groups. In spite of Ball's clear positions, some researchers have been utilizing the policy cycle approach with an uncritical or apparently neutral epistemological perspective.

Ball's ideas also pose challenges to Brazilian researchers. The first challenge is to use, in the semi-periphery Brazilian context, ideas and theories that were developed to deal with the reality of a core and economically developed country, with an active social society. Having a much more centralized state and a very different relation between civil society and the state creates interesting questions to the policy cycle approach, for example. This approach assumes an educational system where devolution played a much bigger role than in the Brazilian society. Therefore, Brazilian researchers should include in their work some justifications for the adopted options and indicate the adaptations and recontextualization that were performed in the use of these ideas and theories.

A second challenge is the fact that Ball's work inspires non-descriptive, thorough and sophisticated analyses and not the mere elaboration of concepts taken from data collection. This means that research reports and the final analysis have to be more creative and original.

A third challenge has to do with the breadth of educational policy studies in Brazil. Ball (2012) indicates that despite the intense discussions and debates about globalization, educational policy research has concentrated, in general, on the analysis of the nation-state, within the 'government policy' paradigm, without broader comparison. Furthermore, according to him, tools and perspectives that could be the basis for a more cosmopolitan sociological analysis of policies are missing. Beck (apud Ball 2012) 'describes a cosmopolitan sociology as a necessary condition for grasping the dynamics of an increasingly cosmopolitan reality'. For Beck (apud Ball 2012), 'a cosmopolitanization is a non-linear, dialectical process in which the universal and particular, the similar and the dissimilar, the global and the local are to be conceived, not as cultural polarities, but as interconnected and reciprocally interpenetrating principles' (Beck apud Ball 2012, xii). This means that educational policy researchers face the challenge of developing research that is based on the principles of 'cosmopolitanization' and

on the response to broader questions about the social purpose of policies and of more comprehensive analyses about the results and consequences of these policies.

Final remarks

In this article, we aimed at indicating some of the main contributions of Stephen J. Ball's scholarship to the research on educational and curriculum policies in Brazil. Furthermore, we have sought to lay out some of the challenges that this author's ideas present to Brazilian researchers. A persistent issue is the fact that Stephen J. Ball's thought inspires a critical analysis of educational policies and of the outcomes of these policies to different social classes, something that needs to be further explored in Brazilian education studies. We also highlighted the depth and breadth of Ball's scholarship and his epistemologically pluralist take on the field. This shows the pressing need for Brazilian researchers to delve into a larger number of publications by this author, with the goal of comprehending how he operates with concepts and theories and how he develops his analyses. Although Ball's work has been received with distrust by Brazilian researchers who operate with a strict understanding of Marxism, many others have been benefiting from Ball's efforts to effectively combine different approaches in order to better analyse the complex contemporary educational reality. Performing this task along with the necessary recontextualization work would undoubtedly contribute to further improve the quality of educational scholarship in Brazil.

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