

Recent Developments in the Relationship between Empirical Comparative Research on Education and Neo-Institutional Theory

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Abstract

Traditional approaches to neo-institutional theory have focused on cross-national isomorphism resulting from processes of scripting and legitimization, but more recent empirical comparative research on education increasingly addresses power critiques in both the theoretical and empirical analyses. These recent developments have also led to a shift in the types of methodological approaches framed by neo-institutional theory as well as an expansion of the institution of education from organizations to individuals. Given these developments the conceptual and empirical advantages of neo-institutional theory as applied to empirical comparative research on education are explored.

Keywords: neo-institutional theory; research methodology; institutionalization; legitimization; culture; normative isomorphism; comparative education

The relationship between empirical comparative research and neo-institutional theory has crossed from a theoretical understanding, which often looked more closely at institutionally-bounded and legitimized conceptions of identity and individuals, to a more embedded and perhaps genuinely institutionalized idea of education. Traditionally, processes of institutional change, specifically the diffusion and reproduction of “legitimated organizational forms and practices”, were the primary focus of neo-institutional theory in comparative education research (Powell, 2020, p.60). But, empirical analyses of the processes of institutional change and the discourse both contextualizing and resulting from these changes have superseded the more traditional contributions of neo-institutional theory to empirical comparative research. In fact, theoretical and empirical developments related to power, approach, and identity are key to understanding how neo-institutional theory relates to and evolves in its explanatory power in relation to comparative education research.

The applications of neo-institutional theory to empirical comparative research on education are evolving to address the critiques that developed in the late 20th century. Those developments are in part due to a clash in ideologies between those who largely critique the theory and those who frame their research with it. The most recognizable development resulting from this ideological conflict is in the expansion of empirical methodologies implemented by researchers using neo-institutional theory as a con-

ceptual framework for their research. But, perhaps the most theoretically-meaningful recent development in neo-institutional theory as applied to empirical comparative education research is the conceptual expansion of who a 'schooled' person is, which also addresses questions regarding the character, expression, and effects of education as an institution.

From its earliest appearances, neo-institutional theory has had its critics. Early critics were more focused on the challenges to addressing cultural change in administration and organization (Zucker, 1977), but this soon evolved into a focus on power (or the lack thereof) in neo-institutionally-framed analyses of educational and organizational phenomena (Anderson-Levitt, 2003; Wiseman, Astiz, & Baker, 2013a, 2013b). While some of these critiques have been meaningful and helped to develop a more robust neo-institutional theory, which enhanced the incorporation of ideas related to the sociology of organizations, cross-cultural norms development, and distinguishing isomorphism from homogenization (Sobe & Kowalczyk, 2013), other critiques have been more focused on issues that may be parallel to neo-institutional theory, but are more about the issues important to the critics rather than the development of a more robust neo-institutional theory (Kauko & Wermke, 2018). This has been especially true of critiques of neo-institutional theory and related empirical research within comparative education.

Yet, there are three recent developments in the relationship between comparative education research and neo-institutional theory that are worth noting. First is the more overt recognition of power, actors, and agency in neo-institutional approaches to empirical comparative education research. Second is the expansion of empirical methodological approaches to comparative education research using neo-institutional frameworks. And, third, is the ever-expanding identity of who a 'schooled' person is. Each of these recent developments are explained in more detail below, and then followed by a revised exploration of the conceptual and empirical 'advantages' that neo-institutional theory provides empirical comparative research on education.

Finding Power in Isomorphic Change

Institutional theory, broadly speaking, originated and developed from the mid-twentieth century onwards (Jepperson, 2002; Powell & DiMaggio, 1991). The initial development of neo-institutional theory largely took place in the 1970s, and now has replaced (old) institutional theory in many of the scholarly fields that developed disciplinary-specific approaches to conceptual and theoretical understanding of political, social, and economic phenomena using this framework (Powell & DiMaggio, 1991; Wiseman, Astiz, & Baker, 2013a). Comparative research on education explicitly began employing neo-institutional theory alongside the sociological and organizational development of the theory in the 1970s and onward, as well (Baker & LeTendre, 2005). In particular, neo-institutional theory in comparative research on education was initially aligned with organizational approaches to understanding the development of educational sys-

tems within nation-states because of the shared cultural and organizational characteristics between nation-state and educational development (Lechner & Boli, 2008). Although the organizational framework of neo-institutional theory persists, more recent applications of the theory in comparative education research have transcended the organizational scope and more explicitly embraced the institution beyond formal educational organizations. This increasingly diffuse application of neo-institutional theory has led to several waves of critique.

A persistent critique of neo-institutional theory as applied to empirical comparative education research has been that neo-institutional frameworks are more concerned with slow change resulting from normative processes (i. e., isomorphism) than from explicit power dynamics (Zucker, 1987; Scharpf, 2018). Some critics have gone so far as to accuse researchers using neo-institutional theory to frame empirical comparative education research of perpetuating neo-liberal agendas and therefore have implied that researchers using neo-institutional theory are responsible for educational inequalities (Wiseman, Astiz, & Baker, 2013a). But, other critiques have noted that there are several key characteristics of neo-institutional applications, which lead to a more visible focus on and prioritizing of the processes of change rather than the agendas, actors, and agencies that lead to those changes (Engel & Burch, 2021). Part of the reason for this focus is that cultural change is by nature often slow and based in broadly-accepted assumptions rather than the work of 'strong men' (Ozga, 1987), which tends to be enacted more quickly and overtly.

How change occurs in society, in organizations, and in education itself (especially national education systems) is the crux of the power critique in comparative education research. The conceptual foundation for understanding change as characterized by neo-institutional frameworks is twofold. First is the impetus for change, which neo-institutional theory in comparative education research has often attributed to legitimacy-seeking and the scripting or modelling of educational norms, structures, policies, and applications (Baker & Wiseman, 2006). Second, these legitimized scripts or models of education are then often borrowed, copied, or implemented as a result of isomorphic processes. Isomorphism is, in brief, the idea of slow change over time. Isomorphism has been most frequently explained in the literature as a process that occurs as a result of coercive, mimetic, or normative change (DiMaggio & Powell, 1983; Mizruchi & Fein, 1999). But, what drives these impetuses and legitimized scripts to slowly change over time in comparative research in education is often unspecified by comparative education research framed by neo-institutional theory. From a neo-institutional perspective, comparative education research has often been more focused on how things occur when no linear, rational, direct, or obvious practical advantage exists for the change. And, more importantly, the actors themselves may not know or understand the rationale or purpose of change, but rather accept or generate change because the action aligns with legitimized, taken-for-granted, or cultural assumptions that do not reflect power and agendas in the direct fashion of more conflict-oriented or critical theories.

This ambiguity around the impetuses for change and the source of power or agency that drives this change is also a source of critique. This is often because critics of neo-institutional theory are usually linear in their understandings of change. In other words, in the lived experience of most individuals and organizations, change forces may be implicit rather than explicit and they may be soft rather than hard (Guerrero, Teng-Calleja, & Hechanova, 2018), but the critics of neo-institutional theory in comparative education research often do not think beyond a linear and overt understanding of change. This is an important shift from understanding who or what receives a benefit of change even when that change is subtle or indirect.

Critics of neo-institutional theory as applied in comparative education research often limit the focus of educational change to an exchange, especially one with winners and losers of some sort. This commodification of education by power-focused interpretations reduces both the implementation and outcomes of education to often quantified commodities rather than mediated cultural shifts or the gradual alignment of norms and values across otherwise contradictory stakeholders. But, empirical comparative education research framed by neo-institutional theory has often looked to understand the process of change from a cultural, organizational, and institutional perspective rather than from a political, power, or competitive approach. This difference is significant because it suggests that there is a fundamental ideology that may underlie both theoretical and empirical research being done in comparative and international education and introduce significant subjective bias from both critical and conflict perspectives.

Regardless of these differences in ideologies and values underlying empirical and theoretical comparative education research, neo-institutional theory has shifted recently – perhaps in response to the critiques – to more frequently and overtly addressing the questions of actorhood and agency both at the individual and collective levels (Ramirez, 2012). As a result, neo-institutional theory as applied to comparative education research is also being more frequently used by researchers to explicitly understand and explain how power imbalances and different forms and levels of power interact to facilitate the legitimization of certain educational norms and scripts both within single educational systems and across those national systems (Davidson & Hylton-Fraser, 2020). This is done through a focus on changes in education policy both within and across national education systems as well as on less easily documented changes in educational expectations among individuals and communities characterized by more or less explicit agency and legitimized power (Bodovski, Kotok, & Henck, 2014).

Expansion of Empirical Approaches

There are persistent voices in comparative education that equate “league tables” with a neoliberal reproduction of inequalities (Takayama, 2008). This terminology is often associated with assumptions that positivism is a necessary partner of large-scale quan-

titative data, such as that collected by international agencies (e.g., World Bank, UNESCO, OECD) and international assessment organizations (e.g., IEA). As such, a persistent critique of comparative research in education framed by neo-institutional theory has been that it is in “league” with the neoliberal agenda and by virtue of its analysis of large-scale, cross-national quantitative data is also perpetuating this agenda. But, there have been rebuttals of this critical assumption, which have demonstrated ways that this argument is flawed (Wiseman, Astiz, & Baker, 2013a, 2013b; Ramirez, 2012; Suárez & Bromley, 2016). Nonetheless, critique often serves to refocus what is critiqued or encourage those who are critiqued to reimagine how something is accomplished.

Comparative education research has been, is, and continues to dominantly be, qualitative methodologies (Davidson et al, 2018). Empirical comparative research on education framed by neo-institutional theory, however, tends to be more quantitative in nature. The empirical characteristics of research addressing institutional questions are a product of the broad institutional or system level research questions that this theory addresses. Yet, the types of questions that qualitative and quantitative approaches to educational research address are, in part, responsible for the ongoing dynamic (some might say conflict) that exists between empirical comparative education research and neo-institutional theory. This historical context is the foundation for recent developments in the relationship between empirical comparative research on education and neo-institutional theory.

Historically, neo-institutional theory has been applied most heavily in comparative education-related research employing large-scale, cross-national quantitative analyses. Yet, a recent development in the early 21st century is the slow-but-steady shift from almost exclusively cross-national time series to cross-sectional large-scale analyses, and also to include more case-focused and individual experiences as data (e.g., Wilbur, 2019). This means that quantitative approaches are becoming more balanced with qualitative approaches in comparative education research framed by neo-institutional theory. The empirical examination and understanding of how “ideas, concepts, standards, and policies” are diffused, translated, and embedded in individual as well as organizational and institutional assumptions about education occurs at both more micro and more macro levels of analysis (Powell, 2020; Zucker & Schilke, 2019; Wiseman & Chase-Mayoral, 2013; Scott, 2010).

The Stanford group represented by John W. Meyer, Francisco O. Ramirez, and their proteges continues to produce insightful cross-national time series analyses that examine the expansion of educational norms, values, activities, and expectations. These analyses have focused on educational enrolment (Meyer, Ramirez, & Soysal, 1992), higher education (Schofer & Meyer, 2005), the development of citizenship education curricula (Rauner, 1998), the growth of early childhood care (Wotipka et al, 2017), the expansion of human rights institutions (Koo & Ramirez, 2009), and many others (Bromley et al, 2021; Furuta, 2020; Buckner & Khoramshahi, 2021). This group of scholars has also been involved in the conceptual and theoretical development of neo-institutional theory as applied to comparative education phenomenon by focusing

on large-scale, cross-national analysis and, in particular, globalization (Ramirez, 2006, 2012). This has been a productive approach to comparative education because institutional effects are often observed in large-scale, 'global' phenomenon more readily than individual level effects.

Others have used large-scale international data to conduct both cross-national and system-specific analyses framed by neo-institutional theory. The comparison and contrast of inter- and intra-national educational phenomena has been accomplished through the specific analysis of national education policies and characteristics (e. g., Schindler, 2021) as well as through the intranational analysis of educational data framed or explained by globalization, broadly speaking (e. g., Windzio & Martens, 2021). This means that the phenomena that neo-institutional theory relates to most readily in comparative education are nested, multilevel effects. These are largely quantitative analyses using large-scale data either from secondary sources or large-scale data collections.

Globalization and the global institutionalization of norms, values, structures, behaviors, and expectations have been the purview of neo-institutional theory for quite some time. This is one of the reasons that neo-institutional theory has often intersected with "world culture" and "world society" theories and associated research (Meyer, 2010; Schofer et al, 2012). But neo-institutional theory is not by nature a global theory. It is a theory that looks at shared norms, values, and taken-for-granted expectations, and seeks to understand how those norms, values, and expectations become embedded in culture, whether that culture is organizational, societal, national, or global. As such, a more recent generation of researchers are framing qualitative comparative education research with neo-institutional theory. Neo-institutional theory applied to comparative education research has expanded to include case studies and individual experiences as both data and methodological alternatives to the large-scale, cross-national quantitative studies that continue to provide insight into comparative education phenomena (e. g., Gonzalez, Arquero Montano, & Hassall, 2014; Astiz, 2006). This is a significant development because it also signals a shift in the types of questions researchers are using neo-institutional theory for to help them explain and understand.

Expanding Identity of Schooled Person

One of the hallmarks of the institutionalization of education in the human experience is a shift in the taken-for-granted identity of an individual, which has expanded to include and perhaps be subtly-but-staunchly defined by the "schooled society" (Illich, 1971; Baker, 2014). Among the many different institutionalized cultures and expectations driving education worldwide, none are as consistent nor as pervasive as the expectation of and participation in formal schooling. Most individuals worldwide have participated in formal schooling at some level, and many have completed compulsory schooling and transitioned to further and higher levels of education. As a result of

the institutionalization of education worldwide, the identity of humans has become largely defined by their schooling.

Comparative education research using neo-institutional theory as a framework began with a focus on the development of a model or script for (a) national education systems and (b) the global expansion of formal education. This initially focused on the availability of traditional, formal K-12 schools, but increasingly expanded to include the expansion of higher education, specifically universities, in comparative education research from the 1990s and 2000s. The research in comparative education from neo-institutional perspectives has focused on (a) the shift in enrolment expansion to achievement in K-12 schooling worldwide, (b) the expansion of rights-related education and cultural identity (e. g., human rights, women's studies, etc.) in university programs, (c) the incorporation of education into the human experience, and (d) its expansion beyond formal education into the daily activities and expectations in almost every community worldwide (Jepperson & Meyer, 2021). The overt focus on educational expansion beyond basic access and the intersection of formal schooling with cultural identity and rights suggests that comparative education research increasingly reflects a broader global cultural shift. This shift has not been defined solely by basic participation in formal schooling among people around the world, but has instead increasingly focused on the quality, substance, and broader social or cultural purpose of the formal schooling that masses of people (literally generations) experience through their involvement, persistence, and often completion of a full cycle of formal schooling in either primary education, secondary education, or both and beyond.

Slowly the idea that education was institutionalized in people, not in institutions or organizations, entered the discussion (Meyer, 2020). For example, informal schooling that occurs outside of formal schools and may not be part of the national educational system was shown to mimic the forms, policies, structures, norms, and values of traditional, formal schooling (Baker, Akiba, LeTendre, & Wiseman, 2001). Shadow education and private tutoring are key out-of-school examples of this (Mori & Baker, 2010). Then, there was a focus on continuing education for adults, which also mimics the formal schooling model while not necessarily being a part of the national educational system or agenda (Verger, 2017). Further than these developments is a growing assertion that individuals seeking to learn new knowledge and skills either for themselves or serve as teachers to others are able to do so (and often mimic the formal schooling approach) because they are "schooled" (Baker, 2014).

Schooled persons, therefore, have internalized the functional, cultural, and organizational characteristics of formal education. This includes an assumption that formal education is a human right and that all people regardless of their status, background, origin, or other characteristics should and do have access to and participate in formal schooling, first during the traditional primary and secondary (or compulsory) education years, but eventually throughout their life cycle beyond formal education. Second, a schooled person accepts the teacher-student arrangement as a basic structure of learning exchange or learning relationships. This is reflected in the way they both transmit knowledge and skills to others as well as how they receive instruction or

new knowledge and skills, even when not in a formal education setting. There is a further assumption among schooled persons that more education is better or increases the value of an individual. This human capital-driven assumption suggests that in order to be socially or economically mobile, more education is required and those with more qualifications will be more qualified to perform whatever related activities are needed. Therefore, schooled persons are embedded in a culture where the norms, values, and traditions all suggest that participation and persistence in formal schooling is natural, that education is a hierarchically-organized exchange between one who has the knowledge and skills and one who does not, and that more formal schooling adds value to individuals themselves.

The conceptualization of a 'schooled' person was introduced in the late mid-20th century by critics of formal schooling, who argued that schooling dehumanizes individuals because it replaces their personal worth with exchange value. In other words, individuals who have attended or completed formal schooling are perceived to be worth more than those who have not. Illich (1971) took this even further to suggest that individuals who have not been to school are considered to be sub-humans or un-human by their schooled peers. Freire (2018) similarly discussed the role that education plays in distinguishing the oppressors from the oppressed, and that one of the ways that oppression reproduces itself is by dehumanizing those who are oppressed in order to affirm the ethical right of the oppressors to have and keep all of the advantages.

These critiques by Illich and Freire are still valid in the 21st century. Although schooled persons assume that formal schooling is normal and expect themselves and others to have participated and persisted to the highest levels possible given their situation, there is ample evidence of cultures and systems at every level of the formal education organizational structure, as well as within social and cultural communities where schools are located, that actively limit, restrict, or deny individuals and even marginalized communities from participating or persisting in formal schooling. These differences are sometimes subtle. For example, social and cultural norms often support boys in science and mathematics, while stereotypically supporting girls in languages and humanities subjects even when boys and girls are in the same classes, with the same teachers, using the same educational resources (Thébaud & Charles, 2018; Van Hek, Kraaykamp, & Pelzer, 2018). But, these differences can also be much more overt. For example, some national educational systems are completely segregated by gender (e. g., Saudi Arabia) or restrict girls' access to education (e. g., Afghanistan) (Al-bakr et al, 2017). Consequently, girls and women are often relegated to secondary status with reduced rights compared to boys and men in societies worldwide, and the inequalities among genders are reproduced through the differentiated schooling of individuals by traditional gender norms (Wiseman et al, 2018).

Education as an institution is reproduced by widely-adopted mass education systems, where formal schooling and the models and values of traditional education are transferred and embedded in organizations and institutions. This serves as the first and perhaps most impactful effect of education. But, this global social, cultural, and

political institution (formal mass schooling) now exists beyond the confines of the structures, policies, and activities of formal organizations and institutions. Instead of formal mass schooling and the norms, values, traditions, and expectations that accompany it being solely ensconced in the institution of education and the many organizational forms that formal schooling takes worldwide, there is now a much more effective carrier of these norms, values, traditions, and expectations. Individuals are the repository of the institutionalization of education in the 21st century because they reproduce the values, norms, and traditions of formal schooling even outside of or far away from the formal school setting. As a result, the individual or personalized nature of the institutionalization of education is the latest frontier of the relationship between comparative education research and neo-institutional theory.

Reimagining the Advantages of Neo-Institutional Theory

The influence and use of neo-institutional theory on comparative education research is unique from neo-institutional theory's development and history in other disciplines, although it arguably originated out of and continues to be closely aligned with sociological neo-institutionalism (Jepperson & Meyer, 2021). Therefore, the relationship between comparative research in education and neo-institutional theory also is better understood if the origins, distinctions, and contributions that neo-institutional theory makes to comparative education research are explored. Previous summaries of the origins and characteristics of neo-institutional theory from both sociological and comparative education perspectives adequately explain both (e. g., Powell & DiMaggio, 1991; Baker & Wiseman, 2006; Wiseman, Astiz, & Baker, 2013a, 2013b; Jepperson & Meyer, 2021); however, there are several key distinctions that are worth noting. These distinctions play the role of both an 'advantage' as well as a uniquely 'comparative education' application, and lie in four areas of conceptual 'advantage', plus the empirical 'advantage' of contextualization.

Conceptual Advantage

There are four basic conceptual advantages to neo-institutional theory that characterize its relationship with empirical research in education. Conceptual advantages mean that neo-institutional theory is often helpful in framing phenomenon for both empirical investigation as well as for functional recommendations or activities. In particular, neo-institutional theory is at its core a cultural theory (Meyer, 2021). Comparative education research is also highly cultural and, specifically, often focuses on cross-cultural contexts and their effects on the practice and impact of education internationally, intra-nationally, and individually. In the exploration and investigation of comparative education phenomena, therefore, the role of culture and context are foremost considerations. But, comparative education research is most often concerned with the formal

implementation of schooling through national education systems, system-wide education policies and their applications in local contexts, and with the individual educator's or learner's experiences within an organizational, societal, or political cultural context.

Given the foundational requirements and expectations of comparative education research related to organizational, social, and political cultural context, neo-institutional theory, in contrast to other theoretical frameworks often applied to comparative education research (1) provides for shifts in educational legitimacies, (2) allows for an understanding of the non-linear effects of formal education on non-technical outcomes of education, (3) conceptualizes the coupling of formal educational organizations and institutional factors with non-school implementations, and (4) is grounded in culture rather than function.

Shifts in Educational Legitimacies. Neo-institutional theory provides a conceptual advantage to comparative education research because it allows for the flexible conceptualization of shifts in educational legitimacies. These include shifts in legitimacy among diverse approaches to schooling delivery, schooling duration, schooling governance, and school as a public versus a private good (Baker, 2014). What counts as legitimized education has shifted significantly over the course of the 20th and 21st centuries. It is a big leap from a factory model of education where classrooms were stuffed full of students and individual learning preferences and needs were ignored due to the belief that the 'science' of education could better track or stream students into the training and eventual knowledge and skills output that best fit them and the labor market's needs, to the often personalized and individually constructed educational system that is the hallmark of many adult education programs and initiatives worldwide.

As a result, what is considered legitimate education can refer to the structure and governance of educational organizations, the official curriculum and how it is implemented, teacher qualifications and pedagogues, and who comprises the student body of a formal school (Van Noord, Spruyt, Kuppens, & Spears, 2019). Questionable legitimacies in education can occur when curriculum content that is not sanctioned by the governing board in an educational organization (i. e., school or university) is taught or is not in line with government- or accrediting agency-approved content (Park, 2010; Stensaker & Harvey, 2006). Or, it can occur when people who are neither qualified to teach nor use the assumed methods to teach are employed or assume the role of a teacher in a formal school (Cochran-Smith et al, 2020). Finally, legitimate education can be compromised when the students in a particular school do not fit the assumed model of what a student should be either because they are not of traditional school age or because they do not conform to the community's standards for who is eligible to participate in formal schooling based on race, gender, or socioeconomic status (Bernhard, 2021).

Neo-institutional theory, however, provides for the shifting of educational legitimacies to follow the norms, values, and traditions of the local community while also considering the boundaries or limits of differing local legitimacies to the broader and

often global institution of education. For example, some comparative education researchers focus exclusively on the unique shifts or differing implementations of formal schooling in micro-communities around the world, and then decry neo-institutional theory for suggesting that formal schooling is normed worldwide (Akiba, 2017). But, these comparative education researchers ignore the dual legitimacies that educational organizations and individuals who embody formal schooling exhibit. Schools are both aligned with local norms, values, traditions, and culture as well as with the formal educational institution at the regional, national, and international levels because they are populated by individuals who carry the legitimacy of education with them. Legitimacy is not in doing the ‘one right thing’ according to neo-institutional theory.

Legitimacy is in doing what is normed, expected, assumed, and considered appropriate or needed by the community and the individuals engaged in education. In other words, deviations from the norm in terms of school organization and governance, teachers and pedagogy, or students and learning are not illegitimate forms of education, largely because they all still occur under the provenance of formal schooling writ large. Instead, there are multiple forms of legitimacy, which may conflict with each other, but do not break or erase the educational charter of the schools. These deviations from the broader institutional norms, values, traditions, and culture may conflict with or even contradict what the broader educational community takes-for-granted about formal education, but these deviations neither result in schools disengaging from the broader educational endeavor, nor in teachers refusing to transmit knowledge and skills, nor in students refusing to learn. In fact, deviations from institutional norms, values, traditions, and culture – especially in education – often results in the exact opposite. There may be schools that lose their accreditation and funding, or teachers who lose their teaching license and are fired from their jobs, or students who are prevented from attending school or expelled, but these are localized aberrations that occur within the broader individually-institutionalized educational norms, values, traditions, and culture which views education as a human right and assumes and encourages all people to participate.

Non-Linear Effects on Non-Technical Outcomes. Another conceptual advantage is that neo-institutional theory provides a framework for understanding the non-linear effects of formal schooling on non-technical outputs like citizenship, healthcare, culture, and labor market participation (Wiseman, 2021; Wiseman & Baker, 2006). In fact, neo-institutional theory suggests that education persists and develops – often in uniquely contextualized circumstances – in ways that a more linear, functional, or conflict-oriented approach would not expect. For example, why does formal schooling persist when evidence suggests that there is neither a consistent nor standardized return on educational investment to every individual participating in or completing formal education? In fact, partial completion without a leaving certificate or diploma is often worse than not participating at all because it signals an inability to complete tasks and is often misunderstood as a moral failing on the part of the individual rather than as an organizational failing of the school (Campbell, 2015). Why do most local differences

or variations in educational implementation lead to improved educational outcomes rather than a breakdown of the formal schooling system itself? If there were only one legitimized way to educate people then educational systems that persist in segregating students and schools based on personal individual characteristics would either fail or be delegitimized, but they are not. And, individuals who graduate from unaccredited educational institutions should not be able to progress through to higher levels of education that are accredited, but they do. In other words, the linear expectations of more functional, conflict, and critical educational theories create false dichotomies, but neo-institutional theory is based on the assumption that education is cultural. Education is not a linear functional phenomenon, but is instead based in norms, values, and expectations more than activities, outcomes, and rational choice.

In comparative education research, the non-linear approach of neo-institutional theory is valuable because of the duality of education both as a cultural norm as well as an organizational relic. As a cultural norm, education is embedded in the schooled person. It is individualized and it serves both individuals' expectations as well as the collective assumptions pertaining to education. As an organizational relic, schools are esteemed and even venerated in international, national, regional, and local communities because of their association with expectations related to social and economic mobility, national political and economic legitimacy, cultural capital, and normative assumptions because, "that's the way it's always been done." But, a non-linear approach is required to understand why a community adopts and implements a system of education that is characterized by testing and accountability more than individual learning, or features curriculum that may be irrelevant to the needs and mores of local communities, or leads to outcomes that do not serve the economic, political, or social needs of individuals. In fact, most formal education from comparative and international perspectives has unintended consequences or serves a purpose other than what is officially stated (Marques et al, 2017; Pareja Roblin et al, 2018). Neo-institutional theory allows for those variations and conflicts in purpose and activity by framing variation or resistance in terms of institutional level (i. e., local versus systemwide) and providing a framework for examining variation within broader and less specific boundaries or limits of legitimacy (Tal & Tubin, 2021).

Loose-Coupling between Formal and Informal Elements. A further conceptual advantage is that neo-institutional theory allows for the conceptualization of loose- and even sometimes de-coupling between formal, official, or structural factors and informal, unofficial, and implementation activities (Wiseman & Baker, 2006). This is a core conceptual advantage when considering policy borrowing either across, between, or within schools and educational systems (Wiseman, 2021). This concept of institutional and organizational coupling has been a key characteristic of research understandings of education at least since Weick's (1977) groundbreaking work on schools as loosely-coupled organizations.

As an example of loose coupling, national languages may have a standardized version (e. g., Hochdeutsch in Germany) that is the official dialect of that language for media or curriculum, but the people may and often do speak their dialect of that lan-

guage in their local communities (e. g., Schwabisch in Baden-Wurtemberg compared to Sud Deutsch in Bavaria). These dialectal differences often make it difficult for individuals from one region to fully understand their fellow citizens in other regions, but they are still both speaking the same language, just different forms of it. There is a loose-coupling of the dialect to the standardized version of the language. In English, some dialects are more loosely-coupled than others, for example a Glaswegian Scottish accent and dialect is different from a Highlands accent or dialect, but is even more de-coupled from a posh London accent, yet all of these accents or dialects are English. In the same way, formal schooling is loosely-coupled across the local, regional, national, and global institutions of education, and especially in the formal schooling systems within and across each of these system levels.

For the most part, education systems worldwide are hierarchical. Even if they are decentralized, they are still hierarchical because the national or federal education system will have governance, funding, or other types of power and decision-making authority with which each of the sub-system levels of governance (i. e., regional, local, campus) will be expected to align with. This in no way suggests that each of these sub-system levels conform exactly to the parent system's mandates, but they often must implement education in ways that vary but do not exceed the limits or boundaries set by the parent system. If they do not conform exactly to the higher organizational governance authority, then there are a variety of responses. They may be sanctioned, or not. They may have funding or resources withheld, or not. Occasionally, the higher governance authority will adjust its boundaries or limits to accommodate the local level implementation or variations (e. g., Tao, 2021). Neo-institutional theory provides a framework for understanding how formal education continues to function in spite of these variations (and in spite of the non-linearity of these variations as well).

Grounded in Culture, Not Function. A final conceptual advantage is that neo-institutional theory is grounded in culture; not the functional behavior of individuals or organizations. Culture is often defined as the customary beliefs, social forms, and material traits of a group or community (Mannheim, 2012). As explained above, culture also resides in persons, who believe and behave in accordance with the way that culture has been individually institutionalized within them. The schooled person is someone whose culture is heavily shaped by their experiences in and related to formal schooling, and often at the most formative years of their childhood and adolescence (Baker, 2014). Culture is also where prejudices, stereotypes, expectations, and assumptions are often rooted (Bourdieu, 2005).

Neo-institutional theory's fundamental elements are legitimacy-seeking, scripting or modeling, loose- or de-coupling, and isomorphic change (Powell & DiMaggio, 1991). It is the isomorphic change that is the most overt advantage for examining the culture of education and how it spreads, changes, and institutionalizes itself in society, organizations, and individuals over time. Isomorphic change is typically categorized as coercive, mimetic, or normative. Coercive and mimetic are isomorphic changes due to force and copying or borrowing, and in comparative education research this has been fruitfully applied to policy borrowing, in particular (Shields, 2015). In particular,

though, normative isomorphism is a key approach to understanding cultural change and dissemination or embeddedness over time. Normative isomorphism is the less explicit, but more powerful force of change. And, it is also the most critiqued among comparative education researchers (Wiseman & Al-bakr, 2013).

Some have said that comparative education researchers who use normative isomorphism as a conceptual framework for understanding educational change are ignoring the technical or “real” forces of change (often identified as neoliberal agency among more politically and conflict-oriented researchers) (Arnové, 2009). There have been some critics who have claimed this is akin to claiming that change ‘magically’ occurs or that education is like a religion and therefore there are mysteries that cannot be explained. But, this is an obtuse critique. Normative isomorphism is about culture, and it provides comparative education researchers with a framework for acknowledging the subtle and often subversive role that culture plays in changing educational policies, organizational functions and structures, and individual behavior and beliefs about education. It does so by focusing on the norms that are embedded in culture (hence the term ‘normative’) and their reproduction.

One of the hallmarks of normative isomorphism as understood via a neo-institutional framing of comparative education phenomena is that educational expectations, activities, and behaviors become normative both over time (i. e., isomorphism), through repetition (i. e., reproduction), and through legitimation (i. e., legitimacy-seeking). Legitimation can come about through an alignment of structure, activity, and expectations with known or standardized forms of education. These processes often do begin with a more overt form of coercion or mimicry either by or of a hegemonic entity, like a colonial nation-state, but the normative part of the process occurs when the coercion and mimicry become more implicit and the known or standardized forms of education, which were perhaps originally more forceful and explicit (as many assert neoliberal entities and agendas are), become the norm or the usual among both the educational organizations and the individuals in a nation, society, or local community.

In other words, normative isomorphism goes hand-in-hand with cultural embeddedness and cultural transmission. To say that people ‘believe’ in education is not to make it magical or mystical and avoid explaining how it happens. That is the explanation that neo-institutional theory may provide in some situations because of normative isomorphism. It is another way of saying that there are normed expectations for education, which may or may not be technically or logically fulfilled in the practical application of education. For example, ample comparative education research has shown that individuals in developed countries often persist in education beyond labor market demands and the likelihood of a maximum return on a family’s or individual’s educational investment (McGuinness, 2006). Likewise, other comparative education research has shown that education in some nations and communities is actively engaged in the oppression of already marginalized individuals and groups (Altbach, 1991). Yet, in both situations, there is also evidence of a strong legitimization of education as an institution and of individuals’ participation in formal schooling, despite evidence of the ineffectiveness or even damaging effects of education in practice (Van

Noord et al, 2019). This is not magical or mystical behavior, nor is it often coercion or mimicry beyond the original instances of education as a national or development project. This is culture and normative isomorphism in action, and is a key conceptual advantage of neo-institutional theory.

Empirical Advantage

Neo-institutional theory provides an empirical advantage to comparative education research because neo-institutional theory nests individual experiences and outcomes within institutional conflicts, contradictions, and ambiguities (Powell & DiMaggio, 1991, p.28; Wiseman, Astiz, & Baker, 2013a, 2013b). Context is key to comparison and mediates the effects of education. Individuals, organizations (i. e., schools), institutions (i. e., education), and societies and nation-states create shared experiences, expectations, and actions (Bourdieu, 1981, p.309; Anderson-Levitt, 2003; Wiseman, Astiz, & Baker, 2013a). Empirical comparative education research that does not nest individual educational behaviors and expectations within the broader organizational, societal, or political context misses the full and often contradictory effects of education at these different levels as well. For example, neo-institutional theory provides an empirical advantage because it reduces polemics and false dichotomies. There is a tendency among comparativists to focus on differences and power (Baker & LeTendre, 2005; Wiseman, 2021). Neo-institutional theory provides a framework for empirical analysis of comparative education phenomena that allows for both differences and similarities to coexist.

An example of this is gender segregation in Saudi Arabian education. Comparative education researchers empirically investigating the educational system in Saudi Arabia have focused on the differences between boys' and girls' education, and argued that girls, in particular, are limited in their educational opportunities and, as a result, their post-schooling labor market opportunities as well (Ahmed, 2020). This is not false, but it is only a partial understanding because it focuses only on the power dynamics and differentiation of a marginalized community (girls and women) as seen from an outsider's or Westerner's perspective. In fact, there is a dual process at play, which empirical comparative education research addresses more clearly when applying a neo-institutional understanding of legitimacy-seeking and loose-coupling.

Saudi boys and men do not persist in education as long nor attain as much education as Saudi girls and women typically do, nor do they transition from high school to college at the same rate. Because of this, boys education in the Gulf region has been declared a 'crisis' by comparative education researchers (Ridge, 2014). First of all, this contradicts the system level critique of male dominance in education, although the gender segregation of education in Saudi Arabia certainly reinforces and reproduces culturally-embedded notions of male-dominated sexism and paternalism. Second, the opportunities provided for girls and women in education outstrip those available for them outside of the educational system. Girls and women perform at higher levels

than boys on average on educational assessments, attain higher levels of education, and have begun transitioning to higher education at higher rates (within gender comparisons) than boys (Wiseman, 2008).

A neo-institutional framing of the gender-segregated educational system in Saudi Arabia recognizes that there are formal organizational structures, policies, and cultural norms at the system and national levels, but also allows for both local level variation (between schools, for example) as well as for nested level variation (between individuals, schools, and national education systems, for example). This empirical advantage provides a more complete understanding of the phenomenon, which has both elements of hegemony and oppression as well as opportunity and mobility. And, these seemingly contradictory elements coexist within the same broader educational phenomenon of gender-segregated schooling in Saudi Arabia.

A further empirical advantage is that neo-institutional theory gives comparativists a framework for looking at what is shared or similar rather than only what is different. Comparison does not exclusively equate with differentiation, although differences are a constant component of comparison. Perhaps from the beginning of comparative education research, the focus has been on identifying what is different, unusual, or not normal for those researchers doing the investigating (Manzon, 2011; Cowen, 2021). This colonial otherness has shaped and continues to shape empirical research in comparative education by only focusing on what is different from the researchers' implied 'normal' education, and can be taken and applied to improve the educational system a researcher identifies with as their normal or home education system. This applies to the policy-borrowing bureaucrat as much as the post-colonial, critical theorist because both operate based on the concept of otherness.

Neo-institutional theory's empirical advantage, therefore, is that it recognizes differences, but also sees how variation is limited in its scope and often is bounded by structures, norms, values, and expectations that are unusually similar given the differences in social, economic, or political culture and practice that exist in different communities. Critics of neo-institutional theory have accused comparative education researchers who use the theory to frame their empirical research as agents of the neoliberal agenda and are bent on the homogenization of education according to Western standards and neoliberal interests (Schriewer, 2012). But, this is also an othering, which does not recognize the usefulness of neo-institutional theory's application of isomorphism to understanding comparative education phenomena.

Similarities are what make comparison empirically possible. There is no opportunity to compare unless there is a baseline or foundation to use as a reference point for the education policies, practices, organizations, or individuals being compared. If there were no similarities in what the norms for formal schooling were, then those who identify conflict and inequality could not do so because there would be no norm for what comprises equality or equity in education. If we look at the inequalities in education among girls and boys in Saudi Arabian education again, for example, there is no way to identify what is equal versus unequal unless the researcher has a normed (and citable) reference for what equal education is.

Beyond the Politics of Theory

Although persistently critical comparativists continue to create their own version of reality wherein neo-institutional theory is a tool of neoliberal discourse to somehow dominate and subjugate, most comparativists either see neo-institutional theory as just one of many different theoretical options for analyzing empirical phenomena in education worldwide or they recognize the diversity of approaches and value in framing international and comparative education research from a neo-institutional perspective. Either way, the relationship between empirical comparative education research and neo-institutional theory supersedes the politics of scholarship through the following developments: (1) an overt recognition of power, actors, and agency either within or alongside institutionalization processes in comparative education; (2) an expansion of comparative education research methodologies framed by neo-institutional theory to include more than the traditional large-scale quantitative methods frequently associated with it; and (3) an expanding identity of who a 'schooled' person is to extend beyond the formal education system into both individuals and society more broadly and indistinctly. In addition, the advantages of neo-institutional theory for empirical comparative education research are that neo-institutional theory provides a framework for an empirical examination of (a) shifting educational legitimacies, (b) non-linear effects of education on non-technical outcomes, (c) the coupling of formal education with non-school factors, (d) education grounded in culture instead of functional or instrumentalist outcomes, and (e) a systematic approach to analyzing educational effects nested within both organizationally- and institutionally-contextualized cultural contexts.

These developments in the relationship between neo-institutional theory and empirical comparative education research supersede the politics of comparative education by demonstrating how social science theories and methodologies can respond to and develop beyond their critiques. For example, as demonstrated above, research framed with neo-institutional theory extends beyond simple impressions of economic or political neo-liberalism by gradually incorporating an overt recognition, measurement, and interpretation of conflict, power, and agency into comparative education research. Also, neo-institutional theory provides a valid and reliable framework for understanding comparative education phenomena in spite of popular politics and reactive ideologies. This is demonstrated by the expansion of neo-institutionally-framed empirical methodologies beyond the stereotypical large-scale quantitative analyses of comparative education phenomena to include more qualitative and mixed approaches. Neo-institutional theory reflects and seeks to understand the social construction of both the theory and its application as evidenced by the expansion of the identity of a schooled person. And, even though some comparativists of education may critique neo-institutional theory, it still provides several conceptual and empirical advantages for the empirical investigation of comparative education as outlined in the sections above.

It is significant that neo-institutional theory has been critiqued as heavily as it has, especially in its application to comparative education, because this suggests both the relevance of the theory and its explanatory power within a field that is often influenced by less empirical and even atheoretical assumptions (Skic, 2020). There is a delicate balance between positivism and the rejection of theory, cultural, and social value. Laudan (1990, p.x) said,

“The displacement of the idea that facts and evidence matter by the idea that everything boils down to subjective interests and perspectives is...the most prominent and pernicious manifestation of anti-intellectualism in our time.”

This is a blunt statement, which suggests that confusing a rejection and critique of oppression and injustice with hostility towards and critique of a highly relevant and application theoretical approach is neither “truthful, wise, humane, [nor] strategic” (Albert, 1996, p.69). It is instead a tactic of attack and blame that is better left to politics than to empirical comparative education research.

This highlights perhaps one of the most obvious recent developments in the relationship between neo-institutional theory and empirical comparative education research: that the forms of conducting, analyzing, interpreting, and applying research in the field of comparative education have become institutionalized to the degree that even a theoretical recognition of what is now institutionalized (and no longer overtly seen) in education seems to some to be purposeful oppression of critical thought when it is more accurately a reflection itself of the process it explains.

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