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DOI:

[10.1080/00220620.2022.2094350](https://doi.org/10.1080/00220620.2022.2094350)

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Document Version

Publisher's PDF, also known as Version of record

Citation for published version (Harvard):

Peruzzo, F, Grimaldi, E, Arienzo, A, D'onofrio, G, Franchi, C & Sebastianelli, P 2022, 'New public management reforms and industrial relations in the Italian education system: A cultural political economy approach', *Journal of Educational Administration and History*. <https://doi.org/10.1080/00220620.2022.2094350>

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To cite this article: Francesca Peruzzo, Emiliano Grimaldi, Alessandro Arienzo, Giuseppe D'Onofrio, Claudio Franchi & Pietro Sebastianelli (2022): New public management reforms and industrial relations in the Italian education system. A cultural political economy approach, Journal of Educational Administration and History, DOI: [10.1080/00220620.2022.2094350](https://doi.org/10.1080/00220620.2022.2094350)

To link to this article: <https://doi.org/10.1080/00220620.2022.2094350>



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New public management reforms and industrial relations in the Italian education system. A cultural political economy approach

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ABSTRACT

This article focuses on the relation between new public management (NPM) reforms and changing patterns of industrial relations (IRs) and social dialogue in the Italian education system. Drawing on data from the research project 'Social dialogue and industrial relations in education: The challenges of multi-level governance and privatisation in Europe' (IR-EDUREFORM), it uses cultural political economy to explore the effects of autonomy, evaluation, and management as policy technologies on teacher unions' collective bargaining, workplace representation and industrial action. Through the Italian case, the study analyses how NPM reforms operated three distinctive transformations: decentralisation of bargaining to school level, juridification and individualisation of industrial action and a shift from collective to professional unions. Beyond critically exploring the implications of NPM reforms and the processes of decollectivisation and individualisation of IRs and social dialogue in education, the study also highlights some potential for the emergence of novel sites for collective representation.

ARTICLE HISTORY


Received 23 December 2021
Accepted 21 June 2022

KEYWORDS

Industrial relations in education; social dialogue; NPM; teacher unions; cultural political economy

1. Introduction

Ten years after the publication of *Industrial Relations in Education* (Carter, Stevenson, and Passy 2010), one can still support the authors' claim that too often the nexus between market-driven workforce remodelling and changes in the forms of industrial relations (IRs) and teachers' unionism finds relatively little space in studies of education policy. Responding to Carter and colleagues' invitation, a few studies began to explore the effects of neoliberal restructuring of public education on teachers' profession, and the impact of privatisation on the participation of teachers' unions in policy processes (Stevenson 2015; Bascia 2016; Verger, Fontdevila, and Zancajo 2016). In this regard, Sorensen, Grimaldi, and Gajderowicz (2021) identify a tension between the necessity of economic investment in teacher workforce and the recent wave of austerity policies in

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the European context. They stress the importance of renewing social dialogue as a method to more effectively involve teachers in policy processes more effectively, and to challenge widespread neoliberal reforms that deteriorate teachers' working conditions and undermine the collective strength of the teacher profession. Relatedly, Verger, Fontdevila, and Zancajo (2016) discuss different models in which teachers' unions engage with the neoliberal turn and privatisation reforms in education, providing a framework to analyse their strategies and repertoires of action.

In this article, we contribute to this debate by focusing on how New Public Management (NPM) as both a global 'philosophical corpus of managerial ideas aimed at driving public sector reform in a range of [education] policy areas' (Skerritt and Salokangas 2020, 1) and a set of reforms that translate those ideas into modes of governing the public sector is changing the modalities of doing IRs and social dialogue in the Italian public education system. In approaching these processes of change, we understand NPM as intimately interlocked with the neoliberalisation of contemporary societies, acting as an apparently neutral and technical relay to operate a re-inscription of the techniques and forms of expertise required for the exercise of government through the generalisation of the enterprise-form. It also enforces a detailed and fine-grained regulated self-regulation of organisations and individual conduct in the sites of localised action according to the neoliberal principles of individualisation, responsibility, entrepreneurship, and competition. IRs are conceptualised here as the sets of rules directly governing or indirectly affecting employment relations in the workplace; the arrangements for defining and changing these rules (including bargaining and industrial action); and the ways in which the rules are enacted by trade unions, employers and state authorities. Social dialogue instead refers to all types of negotiation and consultation on issues of common interest in IRs, which involve representatives of governments, employers and workers (Sorensen, Grimaldi, and Gajderowicz 2021).

To disentangle the interplay between shifts in the spaces of collective bargaining, modalities of doing IRs, NPM and the effects of a neoliberal reason on Italian education policy, we merge the analytics of cultural political economy (CPE) (Jessop 2010; Verger, Fontdevila, and Zancajo 2016), with the genealogical workings of three policy technologies: autonomy, evaluation and management (Ball 2021). Drawing upon the findings of a yearlong qualitative research on the effects of policy privatisation on IRs and social dialogue in education on a European and country levels (Sorensen, Grimaldi, and Gajderowicz 2021), we present a distinctive set of transformations in IRs and social dialogue through the mobilisation of the three policy technologies and their intersection with neoliberalisation and austerity politics. These transformations include a governmental shift which decentralised bargaining to school contexts, a reduction of the space for collective bargaining and unions actions, processes of decollectivisation/individualisation of the employee-employer relation with serious implications for teacher conditions and their involvement in policy-making processes; and two distinctive changes in modalities of representation and industrial action, i.e. the juridification of the conflict and the fragmentation of the IRs field.

In the conclusion, the article offers a picture that stands in contrast with the contemporary global discourse on the centrality of teacher workforces and their involvement in social dialogue and decision-making. At the same time, it provides an analysis that highlights the need for further research on the emergence of *novel* modalities and sites to renew the struggle for political and social rights in education. As such, this article

talks to educational leaders, teachers, teacher unions, educational researcher and policy-makers who are interested in reflecting critically on the implications of NPM, privatisation reforms and austerity measures (Skerritt and Salokangas 2020) for the reculturing of the education professions, their working conditions and the changing forms of the relationships between professions, unionism and the Education State (Ball 2012; Stevenson and Carter 2009).

2. NPM reforms and IRs in education: a CPE approach

NPM and its entanglement with processes of neoliberalisation have been reshaping global and local education policies and agendas for over three decades (Lingard 2020; Gunter et al. 2016; Peck 2010). Recent literature seems to convey the idea that the more time advances, in many countries the entrenchment between NPM and neoliberalisation is significantly changing ways of doing IRs and social dialogue in education (Carter, Stevenson, and Passy 2010; Verger, Fontdevila, and Zancajo 2016; Sorensen, Grimaldi, and Gajderowicz 2021). At the same time, there is the need to acknowledge how NPM and neoliberalism are indeed technologies which mobilise rationalities and materialities that are enacted, i.e. interpreted, translated and mediated according to the contextual features of each country (Ong 2007). Following this perspective, Carter, Stevenson, and Passy (2010) suggest that to understand the changes in IRs in the education sector, it is necessary to analyse the effect of NPM and neoliberalisation on a more local level, focusing on the contextual restructuring of public education services and its uneven temporality (Lingard 2021). Mindful of the entangled relation between global dynamics and uneven temporalities of local policy enactments, in this paper we deploy CPE (Jessop 2010; Verger, Fontdevila, and Zancajo 2016) to historicise the relation between NPM reforms and the modalities of doing IRs and social dialogue in the Italian public education system.

CPE is a historico-analytical approach oriented towards the study of the emergence of political and economic problematisations, their translation into hegemonic strategies and projects, and their institutionalisation into specific structures and practices. According to Jessop (2010), the three mechanisms of *variation*, *selection* and *retention* can explain how these problematisations become institutionalised. By analysing the iterative interaction of material and semiotic and extra-semiotic factors in cultural, political, social and economic policy regimes, the phase of *variation* implies the contingent emergence of distinct policy problems, *selection* the privileging of kind of solutions and *retention* the enactment of related material and discursive practices. In such way, the selective interpretations of problems decisively influence the explanations of their causes and the choice of possible solutions which materialise into policies and reforms. As Jessop (2010, 340) highlights, policy changes emerge 'from the contingent co-evolution of semiotic and extra-semiotic processes that make some meaningful efforts at complexity reduction more resonant than others'. Engagements with CPE in education include Robertson and Dale's (2015) use of a critical CPE of education to explore the various layers of structures and relations between globalising projects, processes and outcomes in education; and Verger, Fontdevila, and Zancajo's (2016) application of Jessop's CPE approach to paths to policy privatisation in education. More recently, Skerritt and Salokangas (2020) use CPE as a historico-analytical framework to expose how different forms of

privatisation and NPM have contributed to shape the modalities of school governance in the present.

In our work, we attempt to make a further step in this engagement with CPE in education, blurring the evolutionary and dialectic dimension of Jessop's analysis, by following the asynchronous and genealogical workings of three technologies of power, autonomy, evaluation and management, through the processes of variation, selection and retention of specific NPM policies in the Italian education system. Within a Foucauldian perspective, we intend technologies of power as 'methods for governing human beings' (Behrent 2013, 55) which mobilise semiotic and extra-semiotic factors according to certain contextual, contingent and historical truths. Autonomy relates here to liberal freedom, decentralisation, and the need to reduce the state's role in collective co-ordination (Olssen 2014). Management is related to the remaking of education governance through techniques of line management and accountability, contracts and forms of power relationships based on hierarchy and performance (Gunter et al. 2016). Lastly, evaluation imbricates individualisation of practices and responsibility in processes of accountability and connects rewards and merit to individual performance (Grimaldi 2019). During the processes of variation, selection and retention, the three technologies of power defy the linearity of time and open a space of possibilities for distinctive changes in the institutionalised modes of doing IRs and social dialogue in education at the national and local scale.

Our analysis of the relation between NPM reforms and the modalities of doing IRs and social dialogue in the Italian public education system is based on data from a one-year project (2020–2021) titled 'Social dialogue and industrial relations in education: The challenges of multi-level governance and privatisation in Europe' (IR-EDUREFORM), funded by the European Commission and coordinated by European Trade Union Committee for Education (ETUCE), which analysed the effects of EU soft-governance and processes of privatisation on the modalities of doing IRs and social dialogue in Italy, Poland, Belgium and Sweden. The wider research project merged a CPE informed policy documents analysis, policy network analysis and in-depth interviews with key informants at the European and national level to analyse changes in IRs in the four countries. The research findings first highlight some key tensions in the European education space between a discourse emphasising inclusion and social partners' involvement at all levels, and competition and performance-oriented policy instruments. Second, they show how this tension plays out very differently in the various member states, and four distinct patterns of changing forms of IRs and social dialogue were discussed related to different trends in the managerialisation and privatisation of public education in the four countries analysed. At the same time, the research raised some common concerns about the implications of NPM reforms for education personnel's fair working conditions, professional prerogatives, social dialogue and education quality and equity, in light of the European Pillar of Social Rights (Sorensen, Grimaldi, and Gajderowicz 2021).

Drawing on this research project and the data set on the case of Italy, we focus here on the findings from policy documents analysis (Republican Legislative acts, i.e. Laws, government and ministry decrees and papers, regulations, national agreements) and in-depth interviews with key informants in Italian education unions and high-rank education policy-makers. Moreover, we enrich the research findings by adding the genealogical analysis of the three NPM technologies to the CPE framework developed in the

project. Table 1 summarises the main findings of our analysis, showing how the processes of variation, selection and retention of specific NPM policies and technologies in the Italian education system have made possible in the last two decades distinctive transformations in the ways of doing IRs and social dialogue in the education sector.

3. Remaking the government of education through a technology of autonomy

In the twentieth century, in Italy, government has been described as welfarist and based on solidaristic and redistributive processes (Ferrera 2012) with a substantial presence of the State to guarantee social and public benefits and with a traditionally low presence of the private sector in public administration (Ongaro 2009). The State has been historically responsible for, and main employer in, the public education system, operating through a bureau-professional mode of regulation (Grimaldi and Serpieri 2013). Within such conformation, trade unions have been powerful actors in public governance and in steering

Table 1. NPM reforms and changing patterns of IRs and social dialogue in the education sector in Italy.

	Variation	Selection	Retention
	<i>Technology of autonomy</i> Problematization of public governance through discourses of autonomy	<i>Technology of management</i> Remaking of education governance through techniques of line management and accountability, contracts and forms of power relationships based on hierarchy and performance	<i>Technology of evaluation</i> Individualising responsibility and connecting rewards and merit to individual performance
Education government	Since the 1997 School Autonomy Reform, schools are remade as autonomous and free organisational units, accountable through evaluative processes for any decision, investment and outcome	In the space opened by the 2009 public administration reform, in the education sector there is a strengthening of the managerial head teacher authority, conferring to them the power to use evaluation as a mechanism of performance management. The autonomous school governance is managerialised through individualised responsibilities, evaluation, accountability and merit	Through the 2013 establishment of the SNV and the 2015 Buona Scuola Reform, trust-based professionalism is challenged and the State-head teachers-teachers relationship is reframed as individualised, technicalised and hierarchised through evaluation
IRs and social dialogue in the education sector	In the wider frame of a decentralisation of IRs and social dialogue, the <i>Rappresentanza Sindacale Unitaria</i> (RSU) grow as new sites of discussion and bargaining The main locus of discussion and bargaining moves to school contexts as part of a tendency towards system fragmentation in which operational management decisions were decentralised to workplace level	Juridification and individualisation of industrial action as new forms of industrial action related to the NPM-driven sidelining of traditional modalities of collective bargaining and social dialogue	Individualised conflicts and working relations open the space for a breaking up of older formations of work and community, including traditional connections with confederal unions and the raise of new professional associations that engage in the resolution of individualised and juridified labour conflicts

workforce related policies (Kickert 2007). In education, teachers' unions played a major role in education policy-making processes, guaranteeing a special status to education public employees (Causarano 2012).

In such a scenario, from the 1990s, a mechanism of variation can be recognised. Amid a monetary and financial crisis, discourses of autonomy began to emerge, problematising the public administration structure as bureaucratic and inefficient (Ongaro 2009), and as in need of more freedom to operate efficiently. Law no 241 issued in 1990 'aimed at a general redesign of the principles regulating the Italian public administration' (Bordogna 2016, 90), reshaping State government structural and cultural legacies. It attempted to reorganise more efficiently the public sector and its expenditures aligning them to NPM ethos and practices (Ongaro 2009); it divided political and managerial responsibilities; and introduced mechanisms whereby subjects and bodies from the private sector could intervene in certain public administration activities. This process of variation, and its problematisation of public governance through discourses of autonomy, affected both the Italian education system as part of the public sector and the sectoral field of IRs and social dialogue.

Holding accountable the bureaucratic and centralistic structure that supported it, the education system also began to be re-thought, with discourses around schools' autonomy increasingly steering public debates. A key site was the National Conference on Education in 1990 that opened a space for autonomy, strategies of management and evaluation to become valid and programmatic objects to align the Italian education system to global trends of economic and neoliberal efficiency and quality assurance. Education was re-conceived as good and delivered by institutions autonomous in their administration of economic and human resources, making them accountable to the central government through evaluation programmes (see Cassese 1990). The focus was on areas of innovation in educational governance and organisational participation; management of professional resources (teachers) and economic expenses; opening to the possibility of schools' autonomy as a viable solution to de-bureaucratise the system through evaluation of performance (Grimaldi and Serpieri 2013). Interestingly, this problematisation of the public sector through discourses of autonomy acted as a common frame for the education reforms agendas of the left-centre and the right-centre governments that have ruled in Italy in the last three decades.¹

In this phase of variation, autonomy emerged as a policy technology, which created both the conditions and rationale for NPM reforms to fashion the traditionally centralised Italian education system. Through the argument to better connect schools to the needs of local communities, operational management of funding, personnel and decisions moved from a centralised state co-ordination to regional and local contexts. Schools were to rethink themselves as autonomous and *free* organisational units, but also to be held accountable through evaluative processes for any decision, investment, and outcome to a multi-level ensemble of constituencies, in particular the State. In the autonomous schools, education professionals were invited to become more reflexive and pro-active employees, interpreters of the local educational needs and responsible to deliver innovative and quality education. In 1997, a policy technology of autonomy materialised this shift and systematised an enmesh of private sector techniques and strategies through Law No. 59 which enabled:

A new headship subjective position, now called the ‘manager’, responsible to conduct the autonomous school and its personnel towards the optimisation of results in efficient and effective modalities, managing resources entrepreneurially and acting as the decentralised hand of the State within the school;

Performance evaluation of the autonomous school as a moral(ising) strategy of governing at-a-distance teaching personnel’s self-government as responsible and responsive professionals that act in the best interest for, and through the vision of, the institution;

An economic and economical connection between monetary and meritocratic incentives, linking productivity and performance evaluation to additional and premium funding respectively to schools and individuals.

Coming to IRs and social dialogue, in the same historical conjuncture, the technology of autonomy began to reshape them among austerity measures,² decentralisation processes and managerial strategies. First, Law No. 23 in 1993 established the Agency for Bargaining Representation in Public Administrations (ARAN) with the aims to legally represent all the employees in the Italian public administration in national collective bargaining processes, to contain the overrun of budgetary requirements in the National Contract and to depoliticise collective negotiations. Second, in 2001 the National Contract sanctioned that social dialogue was still happening as ‘collective bargaining on a national integrative level’, however it would have moved on a school level once autonomy is realised and enacted, and it introduced ‘decentralised bargaining on a provincial level’ (National Collective Labour Agreement, CCNL, 98/2001, Art. No. 3). The displacement of social dialogue in the workplace saw local representation organised in the *Rappresentanza Sindacale Unitaria* (Unitary Trade Unions Representatives – hereafter RSUs). RSUs were first established in 1991 within the private sector to reduce unions’ fragmentation in the workplace, and then introduced in 1997 in the school system through the legislative decree no. 396, as part of the enactment of Law No. 59 and the school autonomy.

In this phase of variation, opened and mobilised by a policy technology of autonomy, austerity measures began to shift the traditionally centralised modality of government of the Italian State in the wider public sector and in education, and opened the possibility for NMP to become a strategy to remake the government of education and social dialogue. On the one hand, by operating economic cuts and connecting austerity to accountability of school actors, they engendered discourses of efficiency, accountability and responsibility in local schools’ contexts. On the other hand, by decentralising resources and responsibilities, they also impacted on the modalities, and places, of doing IRs, making the schools the main loci of bargaining and social dialogue. Lastly, they also opened the space for a second phase of selection in which NPM as a regime of practices and strategies began to normalise the relations between schools and State, with IRs being reshaped by business-like approaches to social dialogue within the school context.

3.1. Regulating autonomy through the technology of management

Following the emergence of autonomy as a policy technology that enabled the systematisation of forces during the period of variation, the 2008 economic crisis, as a moment in which expenditures needed to be contained, opened a phase of selection. Resources and objects began to be organised and made intelligible through a policy technology of

management, which connected a NPM ethos and practices, with their focus on efficacy, efficiency and quality, to economic and financial control. These connections materialised in a series of reforms promoted by the Berlusconi's government (Law No. 15/2009 and legislative decree no. 150/2009). These policies aimed to further decentralise the government of the public sector by first strengthening employers' authority, now called managers, and conferred to them the power to use evaluation as a mechanism of performance management, ranking employees by their performance and distributing economic incentives to award merit and sanction demerit (Bach and Bordogna 2013). Second, they mobilised tactics to restrict the scope for collective bargaining and weaken trade unions' field of action, legislatively regulating and centralising issues of disciplinary sanctions and performance evaluation (including wage incentives, mobility and economic progressions), thus disempowering integrative bargaining at local level. Alongside this, as a result of the 2008 economic and financial crisis, it sanctioned renewed financial control on collective bargaining. Within this restructuring of the public administration, some preeminent confederate unions and other minor unions sealed a National Agreement on 30th of April 2009. Fiercely opposed by CGIL (Italian General Confederation of Labour), the largest union in Italy, the National Agreement, on the one hand, intended to maximise workers' outcomes in a moment of austerity, on the other hand, it materialised 'a form of pragmatic acceptance that does not challenge the neoliberal basis of the reforms' (Verger, Fontdevila, and Zancajo 2016, 162), seeing strategies of rapprochement (Carter, Stevenson, and Passy 2010) as alignment of some of the larger unions to the government neoliberal and managerial plans.

In the education system, the policy technology of management was enacted in the education minister Gelmini's programmatic manifesto, which connected the meaning, objectives and strategies very clearly: 'Authoritativeness, authority, hierarchy, teaching, study, effort, merit. These are the key words we want' (Gelmini 2008 quoted in Gasperoni 2008, 200). Law No. 169/2008 created the conditions to intersect merit with economic frugality, aligning the governance of schools within the current process of reform, managerialisation and autonomisation of the public administration. Furthermore, it set forth a 'reduction of the school network ... to containing expenditure on public servants' (Art. No. 64) reducing teaching and auxiliary technical-administrative personnel and introducing the single-teacher in primary school' (Gasperoni 2008). Here, a technology of management, on the one hand, individualised responsibilities through processes of evaluation, accountability and merit; on the other hand, it began to dismantle school collegiality by reducing personnel and economic resources curtailing and weakening school communities while increasing individual workload.

In this phase of selection, NPM ethos and practices were further secured in the public administration and education culture. A technology of management invested employers with awarding or devaluing employees' performance, leveraging on authority and frugality as regimes of practices that were business-like. Despite unions' attempts to maximise gains for their members, cuts in public expenditure for educational personnel and the freezing of recruitment and salaries worsened teachers' working conditions (Di Mascio, Feltrin, and Natalini 2019). Moreover, the National Agreement together with the reduced spaces for collective bargaining and cuts in paid-leave hours for union activities weakened labour organisations. This stimulated a series of effects on IRs and social dialogue, which became conflictive both at national and workplace level (Pedaci, Betti,

and Di Federico 2020). Furthering the decentralisation of education system and IRs and social dialogue, a technology of management began to decollectivise school communities, institutionalising competition among teachers and empowering the managerial head teachers with the aim to deliver autonomy and efficiency.

3.2. Hierarchising school governance through a technology of evaluation

While a technology of management undermined collegiality by fostering individualism and business-like hierarchical practices, starting from the end of 2011, the retention of technologies of evaluation dovetailed autonomy and management into a coherent mode of government through the economy, and according to an economic rationality. Italy was experiencing a dramatic social and economic situation. The European Commission and the President of the Central Bank sent a confidential letter to the Prime Minister Berlusconi and the Ministry of Economy Tremonti asking to ensure fiscal stability and further promotion of human capital (Bordogna 2016). As an answer, the Italian government planned to re-revitalise and re-articulate the role of the head teacher as manager (introduced with Law 57/1997 and D.lgs 59/1998 and further reinforced by Law No. 15/2009 and legislative decree no. 150/2009), and to focus on teaching staff and school performance evaluation strategies. Experimental evaluation projects in schools were launched, such as the VSQ (*Valutazione per lo sviluppo della qualità delle scuole*) (2010/2013) and the VALES (*Valutazione e sviluppo scuola*) (2012/2015), and new programmes were created, such as School National Evaluation System (SNV) (Law No. 80/2013). The SNV was made up of a set of evaluative strategies including schools, teachers and head teachers' self-evaluation, external evaluation, school strategic plans and social report to pursue school improvement.

This intensification of power relations around a technology of evaluation was first systematised by a reform proposal set forth by the newly appointed Renzi's government. Drawing upon the space opened by the legislative decree no. 150/2009, the proposal advanced the intention to hire 150,000 teachers, planning to 'rethink' their careers by enhancing their 'competences' and 'adding differential elements based on the acknowledgement of their commitment and merit to the years spent in service' (Ministry of Education, University and Research 2014, 48). The proposal was part of a process of consultations with the general public, which intended to reach a general consensus in the writing of the final policy, called 'La Buona Scuola' (Law No. 107/2015).

However, within this collective process of consultation, IRs and their collective modalities of operating became troublesome. In a moment in which the Buona Scuola reform was being drafted, the Ministry of Education Giannini both strategically discredited their collective actions and delegitimated their invitation to formal processes of policy consultations. By defining the unions as 'no longer a privileged actor' and moving the process of consultation on a publicly accessible online platform, Giannini sidelined social dialogue on matters legislatively and traditionally regulated through the National Contract and bypassed unions to reach teachers and school communities directly.

When the final draft of the policy was presented, the technology of evaluation arranged autonomy and management in a refined hierarchisation of school governance. As part of the policy strategic plan, the head teacher was to annually assign to teaching staff a bonus based on a justified evaluation to reward merit, becoming the only case,

among all public and private employment relations, in which receivers and amounts of extra-remuneration are decided unilaterally by only one of the contractual parties. The introduction of performance evaluation schemes first gave head teachers the authority to deal with both administrative and didactics aspects, placing teachers in a condition of subordination; second it exacerbated conflicts around both the distribution of economic resources (such as extra-remuneration) and didactic tasks (Sorensen, Grimaldi, and Gajderowicz 2021). This reframing of the State–head teachers–teachers relationship individualised, technicalised and hierarchised relations between the educational workforce, undermining trust as a regulatory principle of the professional field.

Moreover, the law introduced the possibility for head teachers to discretionally appoint teachers according to their expertise. This implied listing all permanent teachers on territorial registers so to be subjected to principals' direct call nationally, further stimulating competition between teachers on a national level on a newly emerging 'education market'. Therefore, a technology of evaluation first contributed to the radical change of the regulation of staff mobility, traditionally based on length of service, which became entrusted to the discretion of the school manager without any possibility of consultation between the parties. Second, it individualised performance and stimulated teachers' competition and processes of decollectivation by linking qualifications and continuity of service to economic incentives based on the quality of teaching and in-service training. This raised serious issues concerning a change to the system of retribution, by law regulated by the National Contract, with a premium system that would have awarded just teachers that performed well in the system of evaluation, thus overcoming the system of seniority.

While the National Agreement in force at that time decentralised collective bargaining on the workplace by closing the space for bargaining on a national level, it also reduced the numbers of matters for collective bargaining, thus critically leaving many areas of discussion uncovered (Bordogna 2016). This move positioned head teachers in a situation of hierarchical power over teachers in enforcing La Buona Scuola Law No. 107/2015 managerial structures and evaluation strategies. Despite the major teacher unions claiming victories, by means of heavy industrial actions in dismantling most of the articles and prescriptions of the Buona Scuola Law, the process of retention created the conditions for a reculturing of Italian schools and teachers (Gunter et al. 2016) and a validation of the logics of performance evaluation and merit, paving the way for further processes of variation.

4. Autonomy, management and evaluation and new conformations in IRs and social dialogue

The intersecting field of government opened by the three policy technologies of autonomy, evaluation and management as they unfolded throughout the process of variation, selection and retention managed to materialise substantial changes in the ways in which IRs and social dialogue in education are done. In particular, they engendered (i) the emergence of RSU as loci of mobilisation and renewal and (ii) the individualisation and juridicalisation of the forms and settling of disputes in local school settings.

4.1. Emergence of RSU as loci of mobilisation and renewal of social dialogue

Processes of decentralisation of IRs that a technology of autonomy initiated in the phase of variation, combined with the strengthened functions of the school manager to directly appoint teachers and evaluate their performance (Gasperoni 2008, 190), saw the RSUs grow as new sites of discussion and bargaining (Bordogna 2016). From a centralised and collective form of doing IRs, which covered and protected workers' conditions as a category, the decentralisation of bargaining began to move the locus of discussion to school contexts. This displacement was as 'part of that tendency towards system fragmentation in which operational management decisions were decentralised to workplace level' (Carter, Stevenson, and Passy 2010, 15), as a Representative of the National Association of School Managers aptly puts it:

Industrial relations [in education] go hand in hand with the introduction of the figure of the school manager ... because if there is not a manager that exercises managerial functions, it makes no sense for there to be a RSU. Let's say that, depending on the needs, the RSU must somehow dialogue or argue with this [manager]. [...] Only then it would make sense to balance managerial prerogatives with union prerogatives. (Interviewee 1, 07/2020)

As a former national secretary of the biggest Italian teachers' unions further remarks:

RSUs were created precisely as a trade union balance of the power that school leaders gained through [school] autonomy. There is a certain difference, both logical and political, with collegial bodies in the 70s. Those were professional bodies, and were inspired by a collegial logic of functioning, ... RSUs and school managers respond more to a 'corporate' logic in keeping up with the neoliberal climate of the new millennium. The entire construction phase of this situation (1995–2000) sees endless debates against the 'verticalisation of autonomy', the 'privatisation of the employment relationship', the introduction of performance evaluation systems borrowed from the private sector. (Interviewee 2, 09/2020)

Part of the strategic decentralisation of collective bargaining, RSUs emerged as sites where power relations realigned at a local school level, along the relation between head teacher and teaching personnel. They became loci in which it was possible to counterbalance the increasing control operated by school leaders. At the same time, the three technologies of NPM enrolled them within 'a more "corporate" logic and contributed to bring the public education bargaining structure and processes 'even closer to those of the private sector' (Bordogna 2016, 92).

However, as the workings of policy technologies of evaluation and management intensified around the control operated by head teachers and processes of performance evaluation, RSUs also became loci of mobilisation and resistance. As a unionist further argues:

The aggressiveness of the right-wing policies in the years after 2008 forced unions towards tough national battles of resistance, in which the RSUs became useful terminals of mobilisation rather than instruments of widespread bargaining ... The main element of change was, in fact, the establishment of the management and the RSUs as counterbalance, plus a whole series of matters that can provoke dissent and conflict in schools, such as the management of the so-called premium fund. This has greatly shifted the work of the peripheral trade union structures towards supporting RSUs in the process of bargaining. (Interviewee 3, 09/2020)

In a context in which austerity measures and NPM strategies aimed to weaken the collective nature of IRs, the struggles over premium funding and the individualising and competitive allocation of funding to meritorious teachers opened new ways of doing

unionism and social dialogue on a local level. RSUs gradually became spaces that allowed mobilisation of staff and local discussions, in contexts in which teaching and administrative staff members were experiencing first-hand the managerialisation of the education sector and beginning to see the head teacher/manager as the immediate figure to hold accountable and resist for their worsened conditions.

4.2. Evaluation, individualisation and juridification

A related major shift in the forms of social conflict and mobilisation concerns what we call here processes of juridification and individualisation of industrial action. The development of regimes of practices and rationales engendered by NPM began to sideline traditional modalities of collective bargaining, endangering the very nature of social dialogue and generating new forms of industrial action. A prominent teacher unionist in the national scenario describes how this occurred:

The Buona Scuola Reform [Law no. 107/2015] was a blatant attempt to reduce the freedom of teaching and introduce a merit-based management of teachers' activities, leaving all decisions to the school manager ... conceived as an employer of a private company, empowered to hire and fire staff through a series of mechanisms. We as trade unions have strongly contested the Reform and dismantled many of its parts We auditioned, lobbied, etc. The point is that we don't have the right to write reforms with them. If they are respectful of the forms of social dialogue they call us, give us information, listen and take our opinion into consideration. Technically, we can only have an impact by applying pressure, asking for hearings, asking for meetings with the Minister, presenting documents, proposals, etc. This is our mode of action. (Interviewee 5, 05/2020)

Law No. 107/2015 worked through business-like strategies and economic rationale, invalidating traditional ways of doing social dialogue and conflict management. The processes of individualisation engendered by technologies of evaluation and individual merit, the competition sparked by the allocation of premium resources, and the managerial hierarchisation of relations made traditional modalities of doing IRs ineffective in the struggles against teachers' precarious working conditions, contracts' fragmentation and school's managers enhanced authority.

This displacement of powers is neatly presented by a former high-rank civil servant at the Ministry of Education:

... One of the faults of the big school unions, i.e. the five unions that sign the National Collective Agreements, was that of not having engaged enough with some struggles. Smaller unions, such as Anief for example, have chosen a different strategy ... They intercepted the dissatisfaction of these workers against large traditional unions. The same thing happened in the school. The five-generalist school unions, having to defend everyone's interests, end up forgetting those small categories that the small unions instead defend and protect, such as precarious teachers. (Interviewee 6, 06/2020)

The field of government created by a technology of evaluation of La Buona Scuola Law No. 107/2015 intersected with decentralisation and autonomy advocated through Law No. 59/1997, and managerial ethos brought by Law No. 169/2008. The interplay of the three policy technologies across the phases of variation, selection and retention increasingly individualised conflicts and working relations, with the effect of breaking up older formations of work and community, including traditional

connections with confederal unions. As the former high-rank civil servant at the Ministry of Education continues:

The traditional union doesn't do this because perhaps it already has ten other more important issues to bring to the attention of the Ministry. So who does it? The niche unions, by activating an 'appeal machine'. Today in the school we are witnessing the proliferation of small niche unions – the majority of which defend the precarious who in fact represent the most affected category – which are recognised as more credible than the large unions despite their power of action is significantly lower than that of generalist trade unions. If the large unions, for example, can be compared to a tank that has an impressive impact force, the small unions can be compared to a tricycle. The point is that the tank needs many elements to move, while for the tricycle, a simple pedal stroke is enough and it starts moving... The result is that the lawyer or union that engaged in the legal battle ends up getting stronger. This was the genesis of Anief [a newly established teachers union], for example. In this case it is a legal, rather than a trade union, representation. (Interviewee 6, 06/2020)

Following a logic of agility (Gillies 2011) and flexibility proper of a neoliberal understanding of work relations, specialised forms of unionism began to protect individual schools' staff from the burden of evaluative demands and the deteriorating working conditions. Since 2000s, small professional associations began to fill the space left empty by traditional labour organisations – these latter increasingly perceived as bureaucratic, centralised and detached from workers' demands – by engaging in the resolution of the labour conflicts that resulted from the neoliberal restructuring of school workforce and the decrease of social dialogue on a national level. As a former teacher unionist makes it clear:

With the raise of the neoliberal hegemony ... [began to emerge] professional associations capable of replacing trade unions in the relationship between ministry and workers (which in reality does not exist: in schools all over the world fundamental dialogue is between ministries and trade unions, the latter more or less professional, but certainly trade unions). Ambiguous subjects such as Anief have entered this space. (Interviewee 6, 09/2020)

This progressive 'legislation' on issues that were previously addressed through collective bargaining favoured the 'rising of individual claims' (Kirk 2018, 641) and the emergence of new juridical forms of addressing disputes and protecting workers. These started to be seen as the only ways of securing teachers' better working conditions. Partly as a result of the focus on individual merit and performance evaluation, NPM government and ethos had a visible impact on how unionism was being done. A process of individualisation of protection began through juridical processes and services tailored on the employee rather than as part of a unionised category. By displacing responsibilities of outcomes and results on individual teachers, making them calculable, visible and thus accountable for their performance, this decentralisation of power has had and is likely to continue to have an impact on the capacity of schools' staff to think of themselves and feel like individuals that are part of a collective.

If the emergence of RSUs as sites of bargaining and mobilisation could be seen as a structural change, the emergence of new forms of professional unions can be read as an ontological shift in the collective nature of social dialogue. By addressing the specific issues that employees were facing, professional associations effectively began

to put individual issues and interests before the collective ones, according to a logic that individual legal resolutions would bring collective improvement to the whole category by setting a legal precedent onto which reclaiming better working conditions for all. These changing modalities of settling disputes reached the European Court of Justice in 2014, with an exemplary and seminal case of the legal battle waged by two precarious teachers and one auxiliary staff member against the repetition of fix-term contracts that effectively influenced the writing of the Buona Scuola Law No. 107/2015.

However, in a discursive perspective of regeneration of new ways of doing unionism, a prominent trade unionist admits the failures of confederal unions and opens the doors for the perspective of their renewal:

[...], it must also be said that the ideological basis on which the trade union organizations rested has been destroyed and there has been no renewal on our part. I believe that many people, when they understand that these organizations do not do 'union activities' but simply offer services, they will go back and join the union. (Interviewee 4, 5/2020)

As seen with the discursive production of RSUs as loci of mobilisation and struggle, here the unionist reflects on the failures of trade unions on a collective national level, acknowledging the difficulties in adapting modalities of bargaining to the changing social conditions. However, a line of hope can be heard from their considerations: despite the individual initiative of legislative claims, 'claims expressed individually also involve social construction, involving interactive formulation of discontents' (Kirk 2018, 641), therefore bringing a return, or perhaps a renewal, of the ways of doing unionism, IRs and social dialogue in education.

Conclusion

In this article, we have used CPE to intersect the mobilisation of autonomy, management and evaluation as three technologies of power that fluidly connected NPM reasons, objectives and programmes, and changing forms of IRs, workforce regulation, bargaining and industrial action in the education sector in the last three decades in Italy. We have illustrated how a focus on the emergence of NPM-inspired problematisations of the Italian public education in the 1990s and the related processes of selection and retention of decentralisation and site-based management, evaluation accountability and business-like systems of government as policy solutions is key to understand the grid for changes in IRs and social dialogue on a national, regional and local scales in the education sector. In fact, those policy solutions have profoundly changed the regulative mechanisms that govern schools and professionals, their autonomy and interdependencies, their responsibilities and the possibilities for collective action (Olssen 2014, 233) and, relatedly, have also significantly rearticulated the conditions of possibility for IRs and social dialogue.

Autonomy and management as technologies legitimised new hierarchical relations which built on processes of decentralisation and operationalised the subjective position of the head teacher as hand-at-distance of the central State government, investing it with powers to evaluate and allocate resources according to performance. Engendered by austerity measures and financial cuts, the economic(al) rationale underpinning the NPM approach justified reduction of school personnel and teachers, beginning processes of

decollectivisation of the school community. Moreover, a technology of evaluation mobilised autonomy and management in policy-making and evaluation programmes that ensured efficiency and quality to be delivered on the basis of merit and performance.

This set of measures weakened unions power (e.g. freezing of collective agreements, recruitment and salaries) implemented by the government through unilateral decisions, and profoundly undermined social dialogue between social parties (Bach and Bordogna 2013) reducing the role of unions as economic and political actors (Hyman and Gumbrell-McCormick 2010). It also invited part of the unions to embrace forms of rapprochement (Carter, Stevenson, and Passy 2010; Verger, Fontdevila, and Zancajo 2016), aligning to the government privatisation plans and contributing to a further reduction of the space for collective bargaining. Managerialisation and the hierarchisation of head teacher and school staff relationship displaced nodes of power in school contexts, and RSUs emerged as decentralised loci of bargaining and social dialogue. These changes shifted the locus of conflict, bargaining and mobilisation at the school level within a principal-agent relationship involving the head teacher/manager and the RSU, producing a related decollectivisation of the employee-employer relation and significant transformations in both the forms of industrial action and the structure of employees' representation.

Across these dynamics, on the one hand, we identified an increasing juridification of the conflict. On the other hand, decollectivisation and juridification paved the way for the fragmentation of the IRs field and the emergence of new professional and service-oriented unions, in a scenario in which traditional unions began to be seen by the central government as a hindrance for the enactment of its neo-managerialist education agenda, and were made object of a campaign of delegitimisation as valuable interlocutor on a national and school level. At the same time, processes of evaluation and demands of performativity, an increasingly fragmented and diversified school workforce, precarity, and deteriorating working conditions all contributed to the juridification of conflict management, shifting the forms of social dialogue towards individualised teachers' forms of resistance, who resorted to new forms of professional association to individually set their disputes in the workplace.

The emerging picture stands in stark contrast with the contemporary global discourse on the centrality of teacher workforces, the related emphasis on the involvement of workers in decision-making and the invitation to a renewal of sectoral social dialogue (Sorensen, Grimaldi, and Gajderowicz 2021). Such a contrast is immediately visible if one considers some of the actual and potential implications of the transformations we have discussed in this article for IRs and social dialogue in the education sector. First, the complex NPM reforms-austerity measures-regulation by law heavily affected independence and autonomy of collective bargaining, whose scope was narrowed by unilateral decisions and processes of agenda-setting driven by economic imperatives. Moreover, they both emptied the space for social dialogue through juridification and shifted the main space for bargaining to the integrative agreements (Bordogna and Pedersini 2019). Overall, these processes significantly reduced the autonomy of the parties in the context of collective bargaining. Second, the sidelining of social dialogue and the rising government unilateralism weakened traditional collective labour representation in education favouring the emergence of individualised forms of action and conflict (Kirk 2018). Overall, the described changes could result in reduced levels of participation

and unionisation (Capano and Terenzi 2019), affecting unions' ability to participate constructively in decision-making and weakening processes of agreement and codetermination and boosting the related search for (and emergence of) new ways, actors and sites where an individualised teachers' power and influence can be exerted.

We end this article by arguing how it is crucial to further research the long-lasting impact of austerity measures and NPM rationale on school cultures, teacher conditions and their relations with IRs and social dialogue. The project showed that more research needs to embrace a historical, political and economic lense so as to grasp fine-grained modalities whereby become possible to disentangle and understand how financial cuts and managerialism transform education practices, as well as how to resist and refuse such effects. Related to this point, we want to draw closer attention to how processes of juridification and individualisation of teachers' struggles 'also involve social construction [and] interactive formulation of discontents' (Kirk 2018, 641). It is worth understanding more in detail how, despite emerging from a neo-managerialist and decentralising rationale, schools are and can emerge as sites for the rethinking of more localised forms of social dialogue. As shown by the successful outcomes of the disputes brought the European Court of Justice, that benefitted the whole Italian school workforce and amended Law No. 107/2015, new forms of collectivisation are emerging from a managerial governance of education, which open other spaces and possibilities for the reimagining (Robertson and Dale 2015) of IRs and social dialogue in the education sector.³

Notes

1. Since after the 1992 political crisis, Italian politics have witnessed a significant political alternation between left-centre and right-centre governments. In the late 1990s, the Italian government was led by a left-centre government, whilst the first decade of the 2000s saw the predominance of right-centre governments led by the premier Silvio Berlusconi. The last Berlusconi's government (2008–2011) in particular promoted significant austerity measures and NPM reforms, before Berlusconi's resignation in 2011 as a consequence of the economic crisis, political instability and pressures from EU political and financial institutions. However, despite this alternation, it is worth noting here how these governments have always shared a common commitment towards NPM and privatisation reforms in the public sector.
2. Austerity measures have significantly impacted Italian education in the last decades. Between 2009 and 2011, following the 2008 economic-financial crisis, the percentage of GDP allocated to schools fell by almost 0.4%, with expenditure for education being used as a tool for fiscal adjustment and consolidation of the country's financial situation (Bordogna 2016). Austerity impacted mostly on personnel expenditure, and this is particularly relevant considering that personnel cost represents about 75% of the total expenditure for education in Italy. In particular, there have been two levers through which austerity measures have worked: the salaries of employees, with the freezing of seniority increments and the blocking of bargaining, and the number of employees, through the introduction of severe limits on turnover and the hiring of temporary staff. In 2017, the Italian expenditure for education was 2.8% of GDP (plus a further 0.6% for tertiary education and training).
3. http://www.cislscuola.it/uploads/media/cislscuola_IntesaAccQuadAssetContrat_30apr_09.pdf, https://eprints.luiss.it/1171/1/La_contrattazione_interconfederale.pdf, http://www.cislscuola.it/index.php?id=5241&tx_ttnews%5Btt_news%5D=21062&cHash=8c6116c787c32c503411769a21bc2799 and https://www.repubblica.it/scuola/2014/09/15/news/intervista_giannini_maturita-95776177/

Disclosure statement

No potential conflict of interest was reported by the author(s).

Funding

This work was supported by the European Commission DG Employment [Grant Number VS/2010/0120].

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