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Fiscal Cuts in Education and Their Effects: Politicising Learned Helplessness as a Disciplinary Technology in Education Leaders in Catalonia. An Exploratory Research Study

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Abstract: The paper aims to explore how head teachers and other education service leaders and their teams have been experiencing shifts in their identities during the last decade of education cuts in Catalonia (Spain), and the possible effects during the current COVID-19 crisis on educational leaders. Our exploratory hypothesis covers the crisis years (2008–2015) and on into the non-recovery years (2015–2020) until the onset of the COVID-19 pandemic. During these years, through what Ball (2008) describes as a “ratchet effect,” education cuts and their everyday effects in schools produced learned helplessness (LH) in head teachers and leaders. Theoretically, we propose to examine this malaise from a political angle, seeing it as a disciplinary technology to transform education leaders’ identity and practices. To corroborate this, we conducted four interviews with head teachers of different public primary, secondary, and special education schools, and a psychopedagogical service leader in the same semi-rural area in Catalonia. The exploratory results show that the incremental and selective cuts soon became a new normal and created feelings of (political) learned helplessness that may be seen not as negative side effects but as a disciplinary technology that reshaped leaders’ subjectivity. At the same time, education leaders carried out some (ir)responsible practices of resistance that can be understood as care of the self and others. More research needs to be done with different agents to capture the complexity and ambiguity of cuts and LH as a political phenomenon.

Keywords: education policy; education cuts; learned helplessness; ratchet effect; disciplinary technology; Catalonia

Los efectos de los recortes en educación: Politizando el concepto de indefensión aprendida como tecnología disciplinaria sobre los líderes educativos en Cataluña (España). Una investigación exploratoria

Resumen: El artículo busca explorar como los directores, directoras y otros líderes educativos y sus equipos han vivido los recortes en educación en Cataluña. Nuestra hipótesis exploratoria es que durante los años de la crisis económica (2008–2015) y a través de lo que Ball (2008) llama el “efecto carraca,” los recortes en educación y sus efectos en la vida cotidiana de las escuelas produjeron indefensión aprendida en estos líderes educativos. A nivel teórico, proponemos politizar este malestar, analizando la indefensión aprendida como una tecnología disciplinaria que transforma la identidad de los líderes educativos y sus prácticas. Para contrastar esta hipótesis, realizamos cuatro entrevistas con cuatro directores/as de escuela pública primaria, secundaria, de educación especial y de un servicio público de psicopedagogía en la misma área semi-rural de Cataluña. Los resultados exploratorios son que los crecientes y selectivos recortes pronto devinieron la nueva normalidad en educación y produjeron sentimientos de indefensión aprendida. Unos sentimientos que analizados políticamente pueden ser vistos, no como efectos negativos no deseados de los recortes, sino como una tecnología disciplinaria que reconfigura la subjetividad de los líderes educativos. Al mismo tiempo, estos líderes educativos realizaron diversas prácticas (i)responsables de resistencia que pueden ser entendidas como cuidado de uno mismo y de los otros/as. Esta hipótesis exploratoria requiere más investigación con los diferentes actores—voces implicadas en los recortes en educación, para capturar la complejidad y la ambigüedad de la indefensión aprendida como fenómeno político.

Palabras clave: política educativa; recortes en educación; indefensión aprendida; “efecto carraca,” tecnología disciplinaria; Cataluña

Os efeitos dos cortes na educação: politizando o conceito de desamparo aprendido como tecnologia disciplinar em líderes educacionais na Catalunha (Espanha). Uma investigação exploratória

Resumo: O artigo procura explorar como os diretores, diretoras e outros líderes educacionais e suas equipes vivenciaram os cortes na educação na Catalunha. Nossa hipótese exploratória é que durante os anos da crise econômica (2008–2015) e por meio do que Ball (2008) chama de “efeito catraca,” os cortes na educação e seus efeitos no cotidiano das escolas produziram desamparo aprendido nesses dirigentes. No plano teórico, propomos politizar esse mal-estar, analisando o desamparo aprendido como uma tecnologia disciplinar que transforma a identidade dos líderes educacionais e suas práticas. Para testar essa hipótese, realizamos quatro entrevistas com quatro diretores de escolas públicas primárias, secundárias, de educação especial e um serviço público de psicopedagogia na mesma área semirural da Catalunha. Os resultados exploratórios são que cortes crescentes e seletivos logo se tornaram o novo normal na educação e produziram sentimentos de desamparo aprendido. Sentimentos que politicamente analisados podem ser vistos, não como efeitos negativos indesejados dos cortes, mas como uma tecnologia disciplinar que reconfigura a subjetividade dos líderes educacionais. Ao mesmo tempo, essas lideranças educativas realizaram diversas práticas (i)responsáveis de resistência que podem ser entendidas como o cuidado de si e dos outros. Essa hipótese exploratória requer mais pesquisas com os diferentes atores—vozes envolvidas nos cortes educacionais, para captar a complexidade e ambiguidade do desamparo aprendido como fenômeno político.

Palavras-chave: política educacional; cortes na educação; desamparo aprendido; “efeito catraca;” tecnologia disciplinar; Catalunha

Introduction: The Fiscal Cuts in Education, the Ratchet Effect, and Professionals’ Learned Helplessness

If we agree that our task as researchers is to understand “both how domination works and the possibilities of interrupting it” (Apple, 2003, p. 24), the policy sociology perspective can be useful. As Ozga (2021) explains retrospectively, this perspective was defined in the late 1980s as “rooted in social science tradition, historically informed and drawing on qualitative and illuminative techniques” (p. 291). In our case, we wish to conduct an exploratory analysis of the cuts in education in Spain between 2008 and 2015. However, following the policy sociology perspective, we do not want to do so taking education cuts policy as an “object, a product, or an outcome, but rather [as] a process, something on-going, interactional and unstable” (Ball, 2013, p. 8). We will analyse education cuts as part of the neoliberal (education) policy reform that oriented and produced political and economic decisions after the 2008 crash until the onset of the COVID-19 pandemic in 2020. Here, cuts as policy reform are understood as being “not just about changing the way things are organised or done. It is about changing teachers and learning, and education institutions” (Ball 2013, p. 9). That is, the policy sociology perspective analyses education as being increasingly subject to economism, to the “need” for the reform of public services, to productivity and the remaking of the public sector. Specifically, in our exploratory research, we would like to focus on how macro decisions like education cuts in Spain have affected, over the last decade, the professional everyday life, practices, and motivation of education leaders (head teachers and education service leaders) in Catalonia; on how these transformations have affected them as professionals and as leaders; and on how they might be analysed critically. To do so, from the policy sociology perspective, we use the

notion of the ratchet effect to understand how education cuts increasingly affect education leaders¹ (Ball, 2008). We would also like to examine the politicisation of the psychiatric concept of learned helplessness (Diener & Dweck, 1978; Hassard et al., 2017; Maier & Seligman, 1976, 2016, among others).

The Ratchet Effect

With Ball (2015), we wish to analyse how education cuts work, using the concept of the ratchet effect and its consequences (such as learned helplessness), as “policies [that] both change what we do (with implications for equity and social justice) and what we are (with implications for subjectivity)” (p. 306). Discussing privatisation in England, Ball (2008) defined the ratchet effect as the process of

changing practical and discursive possibilities. That is, an incremental process of breaking up established assumptions and modes of operation and taken for granted practices and replacing these with new “freedoms,” new players and new kinds of relationships and new forms of service delivery in many different parts of the education system, all propped up by a constant flow and reiteration of political rhetoric emanating from diverse sites and sources. (p. 185)

Education cuts in Spain, from 2008 to 2015, worked by small and incremental policy moves that change practical, institutional, discursive, and subjective possibilities. Because “each move makes the next thinkable, feasible and acceptable and over time and as a result the private sector or private forms of provision become ever more deeply embedded in the texture of the public services” (Ball 2008, p. 196). That is, as we shall see, starting in 2008 and hitting rock bottom in 2013, dozens of small, incremental, selective, and progressive movements in education cuts related to budget, staff, resources, and services made the next one not only thinkable and acceptable, but even inevitable, normal, and required. This paper makes the hypothesis that it was precisely through the ratchet effect that education cuts worked for nearly a decade, affecting former and current discomfort and complaints of head teachers and other education leaders.

Learned Helplessness

We propose examining the clinical concept of learned helplessness from a political angle in order to critically understand how education cuts, through the ratchet dynamic, could push education leaders through an increasing, progressive, and lasting lack of resources to the loss of control over their own work and to different forms of discomfort and unease. Based on former research (Abramson et al., 1978; Hassard et al., 2017; Maier & Seligman, 1976, 2016; Peterson, 1985; Qutaiba, 2011; Saxena & Shah, 2008, among others), we understand learned helplessness as a process in which people are repeatedly exposed to situations beyond their control. Such exposure results in passivity, decreased interest, and a reduction in the initiation of responses. Thus, learned helplessness argues that when events are uncontrollable, professionals learn that they have no control over outcomes. This loss of a sense of agency produces negative motivational, cognitive, and emotional effects. As Qutaiba (2011) illustrates, when education professionals are exposed for a long period of time to aversive stimuli that promote the interiorisation of lack of agency in their work—

¹ To avoid potential confusion, we should note that our use of the term “ratchet effect” follows Ball (2008) in referring to the cumulative effect of seemingly small, incremental changes in government policy—in our case, budget cuts. This should be distinguished from the ratchet theory of government growth, which asserts that crises cause government spending to rise and to remain permanently higher than if the crises had not occurred (Holcombe, 1993).

that is, when there is no correlation between their actions and their consequences—it can negatively affect different aspects of professional activity. Here Qutaiba (2011) explains the three dimensions of learned helplessness effects, following Maier and Seligman's (1976) model:

Less motivation: perception of lack of control, of no link between one's professional work and agency and the outcomes, can make people less willing to make the effort to respond to everyday tasks, to new challenges or to achieve goals.

Negative cognitive setting: some professionals, after experiencing lack of control, “believed that success and failure is independent of their own skilled actions (...) and had difficulty perceiving those skilled responses were effective” (Maier & Seligman, 1976, p. 13).

Affective disturbances: when an organism “expects to be unable to control the appearance of a reinforcement [they] may experience high levels of stress and anxiety,” fear responses, or emotional arousal. (pp. 2–3)

The main perspective on learned helplessness focuses on the individual and is apolitical, analysing the consequences of some random adverse events on individuals. Here, however, we would like to approach learned helplessness from a political perspective; as “political-induced learned helplessness.” That is, to understand it not as an object to be analysed, but as an interactional process; a state caused not by random or natural elements but by intentional policy reform; something that can change what we do, what we are, how we work, and how we perceive ourselves and others; and it can be better understood not as a negative and/or random side effect of education cuts but as an intentional act to produce specific effects. With Foucault (1988), we could define “politically-induced learned helplessness” as a disciplinary technology that was designed to shape the moral constitution of education leaders, teachers, etc. in order to change what they do, what they are, and how they work. In this case, politically-induced learned helplessness means that what can cause LH is not neutral or random, and that LH is not (only) an individual or psychological discomfort but an intentional managed political phenomenon. As such, it could be designed to produce specific kinds of leaders' and (head)teachers' professional subjectivity: “the obedient subject, the individual subjected to habits, rules, orders; an authority that is exercised continually around him and upon him and which he must allow to function automatically in him” (Foucault, 1977, p. 227). Thus, we can analyse cuts critically and their effects as a disciplinary technology aimed at rendering education professionals and their main identities and practices as docile technicians and not intellectuals or real leaders, to do more with less, to produce more education service with less resources, and so forth. In the discussion section, we will examine the ratchet effect and politically-induced learned helplessness further, analysing and discussing the results of the exploratory fieldwork. In the next section, we provide some data to contextualise the education cuts.

Education Cuts in Spain and Catalonia: Some Contextual Data

In Spain, the cuts and declining public investment started in 2008 and reached their peak in 2013 when, after months of incessant increase, the risk premium of the Spanish public debt reached 630 basic points, which meant that Spanish financing cost almost 7% interest for the public coffers. During these same months, the Spanish government asked for a bailout of €100,000 million to save the banks from bankruptcy due, above all, to their malpractice, especially in the real estate sector. The economy contracted 2.5% and the threat of a total bailout like the one made for Greece seemed very real according to all the newspapers and television channels. Unemployment was around 26%

of the active population with almost 5 million people out of work. From 2008 to 2013, cuts at first increased in small and incremental changes and then, in 2012–2013, there was a fairly radical shift, a highly rigorous policy of cutbacks, austerity, or “fiscal consolidation.” These austerity policies in education during the worse stage of the crisis in Spain (2009–2013) can be calculated, according to data from the Ministry of Education (2018) as a reduction of 16.6% of the total expenditure during these five years. These figures, in relation to Gross Domestic Product (GDP), shows an evolution in Spain from 5.04% of expenditure in education in 2009 to 4.41% in 2013 and, paradoxically, after the “end” of the crisis in 2015, the rates kept going down until they reached 4.23% of GDP in 2018. To better contextualise the cuts throughout this period, the Spanish GDP remained quite stable between 2008 (1.109.541.000.000€) and 2016 (1.113.840.000.000€), with the lowest number, being precisely in 2013 (1.020.348.000.000€).

The Spanish state transferred competences in formal education to the Catalan region in 1980. Since then, Catalan schools belong to the regional government and are ruled under a mix of regulation between Spanish general laws (global organisational framework) and Catalan laws that reshape, nuance, and enact governance (Collet-Sabé, 2017). In this context, when we analyse specifically how the cuts were carried out in Catalonia (2008–2015), we can see, with Bonal and Verger (2013) and Martínez-Celorrio (2015, p. 395), that these were of two types. First, non-selective or linear cuts that were mainly directed at: (a) salary cuts of government personnel; (b) reductions in the teaching and non-teaching staff at schools; (c) a hardening of the work conditions of temporary workers and substitutes; and (d) a drastic reduction or elimination of the Catalan government’s contributions to municipal nursery schools, scholarship, canteens, transport, extracurricular activities, and inclusion programmes, among others. And second, selective cuts focused on: (a) the virtual elimination of the sixth hour at state schools,² an action that permitted them to give the same hours of teaching per day (6) as the private and private state-granted schools; (b) a bigger reduction in the budget of state schools (16.7%) as compared to state-granted private schools (12.5%), and also a greater reduction in the expenditure per student in state schools than in state-granted private schools; as well as maintaining more classrooms in the latter than the former; (c) a large reduction in the budget for educational services (psychopedagogical, psychological and SEN (Special Educational Needs) and teacher training and the complete elimination of the budget for educational research. The budget cutbacks in the education department of the Catalan government (Generalitat) was similar to that of the Spanish government (16.7%). The overall results of these years of gradual increase in cuts was that, according to the BBVA (Banco Bilbao Bizcaia Argentaria) report on public services (2015),³ Catalonia was the second region with the lowest expenditure on education in relation to GDP (surpassed only by Madrid), with 2.8% in 2013. In addition, growing austerity involving reduced budgets were inversely related to school demographics, since during the cuts between 2008 and 2015, there was an increase of 98,000 students.

Thus, with Bonal and Verger (2013), we can say that the lack of public funding for education in Catalonia and the way in which the cuts were managed is not only explained by economic, “technical,” and/or regulative questions, but also by political decisions that are based on specific government options. Reducing budgets, in this case in concert with “governing at a distance” (Barry et al., 1996), proved to be a powerful tool for disciplining and for guiding the behaviour of teachers,

² Historically, in Catalonia, the state primary schools used to offer 5 hours per day while the Catholic-granted offered 6. During the years 2005 to 2008, the Catalan government tried to overcome this inequality offering the 6th hour in all primary state schools. It lasted for a few years because when the 2008 crisis arrived, this was the first policy to be abandoned because of its cost.

³ https://w3.grupobbva.com/TLFU/dat/INFORME_SERVICIOS_PUBLICOS_FUNDAMENTALES%20EBBVA-IVIE.pdf

head teachers, leaders, and families. The gradual and selective increase in cuts, especially in state schools and public educational services, in training and research, can be analysed as an exercise of disciplinary technology that explicitly seeks to produce a new identity (Foucault, 1988). Despite all regions in Spain experiencing similar cuts in education ordered by the Spanish government, not all of them were enacted the same way. Those governed by right-wing government like Catalonia and Madrid, among others, tended to “welcome” cuts, adding in some cases privatisation, hierarchical organization, etc. and were used as a disciplinary technology to orient the conduct and produce new subjectivities of education professionals (Fernández-González, 2016; Prieto & Villamor, 2012). Meanwhile, other regions governed by the left-wing, tended to fight against the enactment of the Spanish government cuts, to delay its implementation, and to enact it in a non-linear way and protecting education against cuts like in Andalusia (PSOE and IU) or the Basque country (PSOE).⁴

We therefore analyse LH and its motivational, cognitive, and affective malaise not as an unwanted side effect of the cuts, but as a powerful political tool to transform the professional identity, subjectivity, practices, relationships and connection, and motivation of educational leaders and professionals. A disciplinary technology that promotes a new model of leadership that is less democratic, less relational, less involved, less intellectual, and more technocratic, more docile, more productive, and more managerial (Collet-Sabé, 2017; Foucault, 1977). We examine this in more detail in the next section.

The Effects of the Cuts: Diminished Agency and Politically-Induced Learned Helplessness in Education Leaders

During the last few years, different research has shown the level of Spanish education professionals’ stress and discomfort. Teachers, head teachers, and other professionals have to respond to an increasingly demanding education system, characterised by multiple educational and social factors that they have to face with few resources (Caballero, 2018; Collet-Sabé, 2017; Guerrero-Barona et al., 2018; Mérida-López et al., 2017; Ramón, 2015; Sánchez-Llull et al., 2015, etc.). When the COVID-19 lockdown began in Spain in March 2020, the education system experienced what can be understood as a “stress test.” All the professionals, organisations, resources, coordination, and so forth were placed under the great pressure of keeping the schools and other education services open but running online. Both through informal conversations with head teachers and other education leaders and regarding first exploration surveys addressed to education professionals,⁵ we detected a discourse of complaint that goes far beyond the specific context and difficulties of the four months of the pandemic lockdown. They talked about the problems of the organisation of the education system itself, about scarce structural resources, about demotivation, among other aspects. Here, we start to build up an exploratory research question in which current leaders’ stress, discomfort, and complaints are probably not mainly related to the situation created by four months of COVID-19 lockdown. Thus, we proposed the following research question: Are the current complaints and discomfort of head teachers and other education leaders more related to the circumstances of the pandemic or to the accumulation of cuts, the lack of human and material resources, and linked demotivation experienced over the last decade? How can this malaise be analysed critically?

As mentioned earlier, based on previous research by Maier and Seligman (1976, 2016) and others, we see learned helplessness as the result of repeated exposure to situations over which the individual has no control. But, as explained above, we wish to reshape LH into “politically-induced

⁴ https://elpais.com/politica/2012/04/25/actualidad/1335382143_198766.html

⁵ <https://geps-uab.cat/informes-recerca-escoles-confinades/>

LH,” to understand it as a disciplinary technology, as an intentional tool to reshape the subjectivity of education leaders and their relationships, affects, and interests into a more managerial, productive, technocratic, bureaucratic, and docile identity (Ball, 2013; Foucault, 1977). When events are uncontrollable, and incremental and selective cuts are that kind of event, professionals learn that they have no control over outcomes. This loss of a sense of agency produces negative effects in three dimensions—motivational, cognitive, and emotional—that can last for a long time in teachers and professionals depending on what kind of causes generate loss of control. In the first dimension, there is a loss of motivation manifested in a reduced effort to respond to everyday tasks, to new challenges, or to achieve goals. As Maier and Seligman (1976) put it: “when a human being is faced with noxious events that it cannot control, its motivation to respond seems to be reduced” (p. 9). It leads to a desire to escape, to avoid things, to approach everyday work passively; and the deterioration of one’s readiness to face tasks, aversive situations, and challenges seems to be the response of many people when faced with continued uncontrollability. Some of these effects can last for a long time, depending on the length of exposure. In the second dimension, using Qutaiba’s (2011) terminology, there is a negative cognitive setting that involves a difficulty in perceiving the effectiveness of one’s skilled actions. Paraphrasing Qutaiba (2011), when an organism “expects lack of control [they] may experience greater learning difficulties in new situations” (p. 2) and experience themselves as less skilled to change or improve new situations. And in the third dimension, there are affective disturbances (Qutaiba, 2011) that include stress, anxiety, fear, and emotional arousal.

In our research, we will use these three dimensions (motivation, cognition, and affectivity) for structuring the data from our fieldwork in order to corroborate whether LH can be effectively analysed as a “politically-induced LH”; that is, as a disciplinary technology that through the ratchet effect of incremental and selective cuts and their effects (long-lasting, less motivation, negative cognitive settings, and affective disturbances) can transform the identity, practices, and subjectivity of education leaders into a more passive, docile, technocratic, productive, and managerial one.

Methodology

To carry out our research we proposed an exploratory case study. According to Yin (2009, p. 2), a case study is suitable when the researchers want to answer “how” or “why” questions, when they have little control over events, and the focus is a contemporary real phenomenon with blurred barriers between the case and context. Specifically, Yin (2014) proposes using an exploratory case study when researchers presume strong links between different phenomena and want to explore what kinds of links, perceptions, and relations there are, and how these links work. To collect the initial information, we needed a number of education leaders who could speak openly, in a trusted environment, even against the public administration they work for. To do so, we intentionally selected four leaders based on three criteria: (1) their position as educational leaders during the past 10 years and therefore as people who had experienced the cutbacks and their effects over the years; (2) mutual trust with the research team that could create a climate conducive to speaking frankly; and (3) being from the same semi-rural region and thus having experienced the same cuts in the same context.

Three of them were head teachers and the fourth was the leader of the region’s psychopedagogical service. To provide a little context, a head teacher or education service leader in Spain (Bolívar, 2019; Bolívar & Ritacco, 2016; Collet-Sabé, 2017) is a teacher chosen by their colleagues and is responsible for the management of the school. After some years, they return to the teaching staff. The first is head of a primary school (n° 1), the second head of a secondary school (n° 2), and the third head of a special needs school (n° 3). To complement them, we interviewed the leader of the psychopedagogical service of this region (n° 4). The two classes per year primary school

is a multicultural state school with more than 70% of students from a migrant background, located in a working-class neighbourhood of a large town with 50,000 inhabitants in a semi-rural area. Dozens of families have experienced evictions during the last decade and the school has lost some of the support and resources it used to have some years ago as a “very complex” school. The head teacher is a 45-year-old woman with eight years of experience as principal of the school (n° 1). The secondary state school is located in the same large town but in a more socially diverse neighbourhood. It is a big school with 1,500 students both in compulsory and post-compulsory and vocational education. While the families of this school community have not experienced the economic crisis to the extent of the primary school families, they did lose significant resources and support during the economic crisis. The head teacher is a 50-year-old man who has been in the position for 12 years (n° 2). The special education needs private state-granted school is located in the same city but comprises 100 pupils between 3 and 18 years old and with different levels of disability from the whole region. The head teacher is a 55-year-old woman with four years in the position and 15 years as deputy-head teacher (n° 3). Finally, the psychopedagogical service offers psychological and pedagogical support to all the schools of the region through its 32 professionals. They are part of the main support that other schools have partially lost during the last decade. The leader of the service was a 62-year-old woman who has just retired and who had spent eight years in the position after 25 years as a professional (n° 4).

We conducted semi-structured interviews with the four leaders focusing on the following thematic blocks: (a) school or service context; (b) history of the school or service cuts between 2008 and 2015, from an “objective and subjective” point of view; (c) evolution of their school or service since the end of the cuts to now (summer of 2020); (d) context of their school or service in relation to resources today and how it is experienced; (e) open space for any reflections they wish to make. We believe this technique fits our exploratory research because “the semi-structured interview [...] creates openings for a narrative to unfold while also including questions informed by theory”; and “It also leaves a space through which you might explore with participants the contextual influences evident in the narratives but not always narrated as such” (Galletta, 2013, p. 2). With the semi-structured interviews, we aimed to explore possible links between cuts, their incremental implementation, the various personal, collective, and institutional experiences of this process over the last decade, and to collect possible processes of (politically-induced) LH related to the dimensions of motivation, cognitive settings, and affectivity. After the interviews, which were held in July and August 2020 following all the COVID-19 security measures in the four leaders’ workplaces, we transcribed them with the Atlas.ti programme and analysed them with a narrative data analysis procedure. That is, as Marvasti (2004) explains, “a narrative could be defined as a way of sharing information with others following a particular pattern of telling” (p. 97). In qualitative data analysis, narratives are explored along a number of dimensions like content, structure, functions, and context. In our case, data analysis procedure was a content analysis focused on the statements specially related to the content (the cuts, their experience, evolution, etc.) and the context dimensions in each school/service in dialogue with our key concepts: education cuts, ratchet effect, and politically-induced LH as a disciplinary technology.

Fieldwork Results and Discussion

In this section, the criteria we used to select the excerpts was, following Marvasti (2004, p. 97), the most meaningful answers related to how they interpret their reality (content) and the ways in which they articulate or voice their experiences in their specific context.

The Context of Cuts in Education, 2008–2015

After two years of soft and gradual cuts, when the hard cuts arrived with all their consequences between 2010 and 2012, the leader of the psychopedagogical team, for example, remembers that:

Those years took people away from us, changed our schedules, working conditions were worse. . . it was. . . it was tough! (head teacher 4)

The head teachers we interviewed explained that the most significant cut was the loss of staff or, what amounts to the same thing, the increase in staff–student ratios. In addition, working conditions worsened, not only in economic terms but also in terms of quality and even the type of work. For example, head teacher 2 (secondary school) explained that, during the 2012–13 school year:

They gave us a group without teachers assigned! [. . .] “And where are the teachers?” I asked, and the Department of Education said: “There aren’t any. There aren’t and won’t be.” And we had to start doing wonders, well, the best we could. People were doing far above their ratio of class hours, etc. (head teacher 2)

Here we can see an example of what we have proposed calling politically-induced LH, understood as a disciplinary technology. Following the maxim of the Catalan government of the time, “with less (resources) we need to do more and better,”⁶ there was a process of disciplinising, a transformation of the identity, practices, and horizons of head teachers along the lines of what Ball et al. (2011) explain in their analysis of England secondary schools in order to meet “the productivity challenge” (p. 76). From now on, with no changes in the future, you will have to do more and better with less. In this way, the possible signs of LH produced by this situation, such as having less motivation, negative cognitive settings, and affective disturbances, were transformed into a political tool, a disciplinary technology to gain more productivity in schools, do more and better with less. It is a question of “transform[ing] what we do and what we are” (Ball, 2008, p. 195).

The four leaders also explained that there were not only tough years within the school. There was also a deterioration in the socioeconomic situation of the families, which had a direct impact on the school. This situation has remained and, since 2020, has been exacerbated once again by the economic crisis generated by the pandemic. This meant (and again means today) that teachers have to take responsibility for aspects not directly related to the education of children, by assuming a caring role in relation to the families. This is an initial example of what, also below, we analyse, with Ball and Olmedo (2013), as acts of resistance that involve going beyond (or against) the mandate of a restricted, docile, and productivist teaching identity. And, in an (ir)responsible way according to political mandates, being responsible for the care of one’s staff and the families, even if this can aggravate one’s own LH. For example, head teacher 3 explained that:

Our work is much more involved, I think [. . .] because we provide a more global service: that is, a family comes to you and says that they don’t have any money to buy food. And you give them a bag of food. Or a foreign family comes to you and tells you that a grandfather has died and they don’t know where to leave the girl: so we have to do whatever we can to find a residence for a month for that seriously affected girl, because she can’t travel. (head teacher 3)

⁶ <https://www.ccma.cat/324/mas-demana-complicitat-als-funcionaris-en-un-moment-de-decisiones-excepcionals/noticia/1055846/>

As a number of researchers on cuts have argued (Horton, 2016; Mérida et al., 2017; Ramón, 2015; etc.), we can say, according to the Foucauldian conceptual framework (2014), the education cuts transformed the truth, the way of governing, and the subjectivity of educational professionals. In two school years (2010–2012), the cuts modified everyday relationships, professionalism, tasks, and the quality and efficacy of service provision, as well as the work atmosphere and sense of the future. The Catalan education system, its truth and its daily reality, had been transformed for the worse, and the key tools to do so were both the incremental increases in cuts—which meant that professionals had to become a kind of hero to fill all the structural gaps through their transformed vocation without any hope of improvement in the future (ratchet effect)—and the effects these cuts had on them: less motivation, negative cognitive settings, and affective disturbances. We propose understanding these effects not as something to be analysed individually, in an isolated manner, or as unintentional and random, but rather as a tool of disciplinary technology, transforming LH into something political: into an exercise of “productive power” (Foucault, 1977).

This was a reality that, through the ratchet effect (Ball, 2008), and after an initial phase of criticism and questioning, was normalised through resignation, compliance, and conformity. Doing work beyond the assigned time, spaces, functions, and tasks (as we analysed earlier as care of the others) here, in an ambivalent manner, ended up being normalised in order to make things work—a double-edged sword since, on the one hand, things were done through more work and effort (usually taking care of children, families, or staff), but at the price of, on the other hand, normalising the cutbacks and occluding the associated conflict and making the reality of overexertion and stress a “new normality.” As head teacher 3 (special education) explained:

People first react saying: “I’m not going to make it, how do you expect me to do it with this child who is so difficult, so complicated. . . . Will you give me some more support? Will you give me more resources?” “No, there aren’t any more.” And then we end up doing the impossible. We have very committed staff! (head teacher 3)

Leaders and teachers got used to the cuts, normalised their reality and effects into everyday life, and avoided fighting them or protesting. Gradually, the depoliticisation and technicalisation of the cutbacks forced the school and the teachers to transform themselves into a new school truth in accordance with the normalisation of the cutbacks. Sometimes, with attitudes of resistance and (ir)responsability that, paradoxically, drove them to spend even more time taking care of others. This was a complex new reality that, as we explain below, affected them motivationally, cognitively, and affectively.

Thus, the gradual increase of cuts and their effects on everyday life in education acted as disciplinary technologies that made teachers face the productivity challenge, precisely through elements such as those that LH explains or even through resistance itself. The politicisation of the psychological symptoms of LH in terms of school productivity and the acceptance and normalisation of doing more with less enables us to understand that the cuts, especially the selective ones, were not just a response to a huge economic crisis. They were also an opportunity to transform the subjectivity of head teachers and leaders, with respect to both productivity and docility, with complex ambivalent dynamics that in some cases can be analysed as both resistance and greater docility (Foucault, 1977). In the next section we will examine some of the ambivalent consequences of the cuts in those interviewed that, from the proposed perspective of LH, can be understood not only as personal psychological processes but also as political dimensions.

Motivation

Despite the efforts of leaders to re-envision, and try and transfer their vision to their teams, a view of the cutbacks as an opportunity to grow and to reinvent themselves, to see them as a

challenge; despite their best efforts, it was difficult to maintain motivation when the cuts proved prolonged and led to deterioration, and when insecurity in working conditions created a feeling of frustration and hopelessness that led to demotivation in tackling problems or and even engendered thoughts of quitting work (ratchet effect). For example, head teacher 4 explained that:

With the cuts, people faced work with less motivation. That is, if you know you have a lot of work that you can't do and that what you do, you'll do with a much lower level of rigour than you would like, you know? [. . .] I think that you get lost in how you live it, how you feel it, and your emotions are of frustration, rage, of. . . hopelessness [. . .] It was tough! There were. . . well, there were quite a few people burnt out and eager to quit! (head teacher 4)

One dimension that also affects motivation, and yet is often invisible, is that the cuts involve a diminishment of intellectual stimuli, undermining the visibility of the work done and lessening its influence. In other words, beyond their immediate effects, the cuts also led to a deterioration in elements that make the workplace more attractive and stimulating. For example, for head teacher 1:

Then from time to time there is someone that recognises the work you are doing, and you share it at the teachers' meeting. Someone from the Department of Education, someone from the university. . . and that's what gives you encouragement and energy. . . . Because it's like a recognition. . . . I think this is where you also recharge batteries, even if it's symbolic and you are abandoned. . . because they come to recognise your work and also the fact that what you are doing you do for the children and families, and this feedback of the children is what makes up for it, which is not fair but it's what makes up for it. . . (head teacher 1)

As previously mentioned, sustaining motivation in a context of significant and sustained cuts ends up relying on the vocation and commitment of the teachers. This is the resource that leaders are forced to exploit further to maintain motivation in an adverse context that is normalised. It is the challenge of productivity where, on the level of educational policy, the symptoms, tensions, and difficulties linked to LH become precisely the political tools for the disciplinary transformation of the subjectivity of the leaders themselves and their teams: we do more and better with less, and this is normalized in one's own identity and dynamics. As head teacher 2 explained:

I have been so proud of our staff! There are exceptions, eh, like everywhere. . . . But "Wow, people have given much more than they were asked for." And the same thing happened with the cuts: our teaching hours increased, and people muttered and so on. . . but you could see them saying "but we have to do it well, we have no choice"—and the same has happened now with this lockdown (head teacher 2)

But even this emotional recourse to vocation and commitment, which we have analysed as a professional responsibility and a taking care of others, has its limits - limits that, on the level of motivation and as the years of extended cuts continue, generate paradoxically, ever more situations of learned helplessness. As head teacher 1 pointed out:

I remember this point of overexertion of the team, and many times without being aware of it, and me and them suffering from it. That cannot be endured forever. . . (head teacher 1)

This is one of the complaints that also came out during the four interviews: when the resources of 2008 had still not been recovered, COVID-19 arrived and they were asked to make further significant efforts. From the educational policy point of view, transforming the identity of leaders

and teachers through cuts, and with them the lack of motivation, negative cognitive settings, and above all affective disturbances (as disciplinary technologies), into more docile and productive professionals is a great achievement for the productivity challenge.

Cognition

With regards to cognitive aspects, the feeling of helplessness stood out among the interviewees: the teachers felt that they have neither the decision-making power nor the tools to reverse certain precarious situations, nor to deal with problems that often fell outside the school's remit. For example, head teacher 1 said:

Nothing that we have been working on has progressed. . . and you reach the point where you say, "we are on our own and this is very difficult, we can't do it!" [. . .] What I can't do is take responsibility for a problem or a situation that doesn't depend directly on you. And this generates complete impotence, complete impotence. . . (head teacher 1)

This impotence, this lack of control, this sobering sense of the impossibility of influencing affairs and bringing about a new educational situation as a consequence of the cuts, embodies the notion of politically-induced LH. Because the policies that produce these effects on educational leaders could be different. But they are, however, consistent with the line of the centre-right government of the time and its maxim of "do more and better with less," of spending less on teaching, training, and research (against intellectual and critical teachers) and of seeking more productivity from the public sector (technocratic, docile, and submissive teachers and less democracy in the schools). As head teacher 1 explained, with respect to the times of fiscal crisis and the current pandemic:

They haven't asked us about anything. Neither what we need, nor the spaces. . . we don't know where the teachers have to ask. . . the feeling is one of complete helplessness, eh! (head teacher 1).

Thus, as we have said, we can analyse LH not as a negative side effect but as an opportunity to produce that identity of leaders that neoliberal and managerial models seek. It is therefore no surprise that incremental cuts also produce other cognitive effects. These include the growing feeling of disorientation in relation to the educational authorities, educational policy, and the continually diminishing resources of the Department of Education and their opaque and uneven allocation and distribution. This lack of control, clarity, and justice undermines the leaders' and professionals' confidence in their own belief systems, including notions of justice and fairness. And it produces more apolitical, less critical, less participatory educational leaders, with less confidence in the possibilities of change, and more focused on the production of the educational service (at a better price).

In this dimension, some schools and services even speak of "institutional abuse" and how this, especially in disadvantaged social contexts, facilitates the reproduction of social inequalities through the impotence of teachers and lower expectations towards the students.

When you go to the Department of Education, they always say: "many thanks for the work you do, we are very grateful." And it's always that. . . . But the words are blown away by the wind. When you have to make decisions, show me that gratefully! No? They have mistreated us for some time, eh? We have talked about institutional abuse for a long time (head teacher 4).

But in these situations where power produces a politically-induced LH through cuts, there are also actions of resistance, or (ir)responsibility with the established guidelines, that open up spaces for caring for oneself and others.

Like when we did the distribution in a situation of total lockdown. . . . We in the management team came here, organised it and distributed it ourselves [. . .] We spent here hours and hours and hours emptying content so we could give it to the students! [. . .] And the Department of Education told me off saying “you can’t do that!” And I said: “Do whatever you want: I had computers, my students didn’t have computers and the management team decided unanimously to give them to them.” (head teacher 3).

Doing things that are “morally right” against government guidelines can be analysed as an act of resistance (Collet-Sabé & Ball, 2020), as a political act of being a “good professional” irrespective of the cuts and one’s own difficulties with motivation and affective states and doing “the right thing.” Or, as Ball and Olmedo (2013) put it, as an act of “irresponsibility,” through which teachers take “responsibility” for the care of their selves and in doing so make clear that social reality is not as inevitable as it may seem. This is not strategic action in the normal political sense. Rather it is a process of struggle against mundane, quotidian neoliberalisations, that creates the possibility of thinking about education and ourselves differently.” (p. 85)

Affectivity

Finally, the head teachers warned of the impact that these cuts, and the consequent continuous precariousness, have on the affective dimension of teachers. They drew particular attention to how this ongoing situation can lead to symptoms of fatigue such as burnout, time off from work, health problems and, ultimately, quitting the job.

There were people who went on sick leave, who suffered burnout. . . that is, everyone experienced it in their own way . . . but there were people who. . . those who suffered most, it took a toll on their health. Health in general, and of course mental health. . . obviously! (head teacher 4).

Exhaustion is a recurring term in all the interviews. This exhaustion is the fruit of the cuts and is related to factors such as staff changes in the schools, the instability of the workforce and the overexertion of the teachers in situations of crisis. Here, the negative effects that lead to LH and even mental health problems lead us to politicise these affective realities that are not individual “problems.” As Critical Mental Health Theory (Cohen, 2017) points out, even expressions of feelings such as sadness have been pathologised in recent editions of the *Diagnostic and Statistical Manual of Mental Disorders*, which contributes to an individualisation of emotional malaise that, as we have explored, has political causes.

Those were really tough years because I feel we fell into a state of existential sadness, you know? [. . .] There was a pessimism and a belief that there was no hope that we would see something interesting again. . . many people of the psychopedagogical service were already starting to get old and were thinking about retiring! (head teacher 4)

Against this, in a positive sense, these situations also generate care, solidarity, and support among professionals, which acts as a “cushion” when times are especially complicated (Ball & Olmedo, 2013). Although, from the government’s perspective, some of these forms of taking care are

irresponsible. Or, from a political perspective of LH, these situations are nonproductive and non-docile.

Conclusion

In this exploratory research, we have analysed the cuts in education in the period 2008–2015, the non-recovery of the budget between 2015 and 2020, and we have begun to outline their possible effects during the current COVID-19 crisis on educational leaders. We believe that the most important discussion in the article is, using the ratchet effect as a framework, the analysis of the negative effects of the cuts on the motivation, cognitive settings, and affectivity of educational leaders from a disciplinary technology perspective. That is, the politically-induced transformation of individual narratives. In the interviews with the three head teachers and the leader of the educational service, the incremental and selective cuts and the effects they have had on their professional lives are analysed from the perspective of learned helplessness, that is, the impossibility of controlling the situation and the effect this has on them as team leaders. And they often do so from a neutral perspective, where the cuts are unintentional, affect them individually and in various ways as unwanted side effects. In contrast, from our theoretical perspective, neither the cuts themselves nor, above all, their selective nature, their continuity after the end of the crisis, their alignment with the political goals of the government of the time of doing more with less from a managerial and technocratic perspective of educational leaders, are neutral. Quite the contrary. They can be analysed as tools with great power to govern and transform the professional identity, practices, and perspectives of educational leaders. That is, as a disciplinary technology that promotes the construction of productivist and docile leaders in response to the productivity challenge.

But whenever there is power, there is resistance, struggle, and uncertainty. And the interviews have also shown how, both during the cuts and with the COVID-19 crisis, there have been practices of resistance that, from the government's perspective, can be seen as irresponsible (Ball & Olmedo, 2013). But they can also be analysed as an exercise of responsibility in the caring of others: students, teachers, and families. After this exploratory research, we believe that it is of interest to continue critically analysing the educational policies of cuts (ratchet effect) and their effects (LH), and other (ir)responsible responses. And do it from this political perspective that analyses them as part of disciplinary technologies to achieve, from the neoliberal and managerial perspectives, this productivity and excellence that involves “doing more and better with less.”

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