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**The OECD and governance:
Investigating the dissemination of ideas in
national policy making**

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Education is the most powerful weapon you can use to change the world

Nelson Mandela

COMPULSORY DECLARATION

This work has not been previously submitted in whole, or in part, for the award of any degree. It is my own work. Each significant contribution to, and quotation in, this dissertation from the work, or works, of other people has been attributed, and has been cited and referenced.

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Abstract

The research question that has been examined in this study is; what are the prominent discourses and the present trends within the OECD work in the field of education, and how does the dissemination of ideas have an impact on education policy making? Two analytical strategies have been used in the study. First, a discourse analysis of an OECD publication (*Trends Shaping Education 2008*) has been performed, and second, a theory study based on existing literature has aimed to examine the governance dimension of OECD and the interconnectedness with national educational policy making. The main theoretical framework has been within the constructivist approach, but also including more rationalist interpretation logics in order to gain a greater understanding of the research that has been conducted. The findings imply that there is a hegemonic globalization discourse within the OECD work in the field of education, closely related to signs such as ‘the knowledge economy’, ‘human capital’ and ‘lifelong learning’. This discourse thus works as a bridge discourse between the OECD and policy making at the national level.

The theoretical discussion show how OECD plays an important role in the dissemination of such ideas to both member and non-member countries, and the organization also seem to take a crucial role in terms of legitimating new reforms and new strategies in national education policy making. However, nation states also influence the work of the OECD, and the influence must thus be described as two-way and closely interconnected. The analysis has shown that a constructivist framework is fruitful in the investigation of the OECD work in the educational field, and that it can open up for a greater reflection around how norms and ideas give directions for what is appropriate behavior for the member states.

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Abbreviations

CERI	Centre for Educational Research and Innovation
EU	European Union
GATS	General Agreement on Trade in Services
HCT	Human Capital Theory
INES	International Indicators of Educational Systems
ILO	International Labour Organization
IO	International Organizations
IR	International Relations
KBE	Knowledge-Based Economy
LLL	Lifelong Learning
NEPAD	New Partnership for Africa's Development
NPM	New Public Management
OBE	Outcome Based Education
OECD	Organization for Economic Cooperation and Development
PISA	Programme for International Student Assessment
R & D	Research and Development
UNESCO	United Nations Educational, Scientific and Cultural Organization
WB	World Bank
WTO	World Trade Organization

1. Introduction

Amongst both international organizations and politicians it is repeatedly articulated that knowledge is the most important source of future advantage. Throughout the last decade in particular, IOs started to be highly active in the field of education and to play an increasingly important role in shaping national policy making. The steering capacity of a nation state is thus both being challenged. Increasingly it is being shaped by international organizations such as UNESCO, the WTO, the WB, the EU and the OECD and there is today a variety of organizations that serve as key actors in the larger institutional environment of education. The processes and programs initiated, designed and organized by IOs are by many scholars described as influencing domestic policy makers in how to reform and transform national educational systems. The question of how, to what extent and with what consequence is constantly being debated, and the need to study the implications of IO governance on the national level is emphasized by many scholars. At the same time, international organizations do not operate on their own, but their debates and agendas may also be influenced by national governments, who use them for pushing and legitimatizing their own political agendas. Hence, there is reason to believe that developments in education policy today consist of complex networks embracing an increasing range of stakeholders at both local, national, regional and global levels.

1.1 Knowledge as a public good

Literature from humanitarian, socio-political and economic viewpoints all emphasize that the government should provide education because it is a public good (Iga 2002). Public provision of education is clearly outlined in Article 26 of the Universal Declaration of Human Rights and Article 13 of The International Covenant on Economic, Social and Cultural Rights adopted by the General Assembly of the United Nations in 1966 (Iga 2002). Also, Stiglitz (1999) highlights how the state must have a central role in the provision of knowledge as a public good, otherwise risking becoming undersupplied. The justification of public provision of education is mainly made on the basis of positive externalities, as it is not only beneficial to the individual, but to society at large (Iga 2002). Through education and in addition to basic skills and competencies, people learn civic attitudes and values and become aware of their rights and responsibilities. One could also argue that education contributes in

creating a national identity and cultural integrity (Anderson 1983). These different aspects can be related to the main aims of education; they are both instrumental and cultural.

Education has increasingly become a “hot topic” in most western industrialized countries today (Martens, Rusconi and Leuze 2007), and OECD can be considered a particularly interesting international organization because of its enduring work in the field of education policy (Martens and Balzer 2004). This acknowledgement of education as a valuable part of economies makes it interesting to study what ideas, norms and interests are central to the OECD work on education, as well as how these ideas are disseminated. As a starting point, one must thus believe in education as a very important policy field, on a national as well as an international level. Stiglitz (1999) focuses on how governments should view knowledge, as a global public good¹ to the benefit of everyone. A public good is that good that is available to everyone - it is non-exclusive - and the use of it does not detract from any other - in other words - it is marked by non-rivalrous consumption. Knowledge is not however conceived of as ‘international’ as there is a distinct individual aspect to knowledge acquisition while at the same time, knowledge is not something that can be somehow over-used or destroyed and therefore, it can be described as global. At the same time, the kind of knowledge and the ownership of knowledge seen as most valuable will differ across geographical and cultural contexts.

As a global public good, it requires public support at the global level, and hence it is also important to have mechanisms that encourage governments to focus on knowledge for the benefit of the people. Stiglitz (1999) raises the question of the knowledge gap between countries, or rather groups of countries, a question that seem highly relevant to the work of the OECD in the field of education, including that of non-member countries.

1.2 Multilateralism in education

In the 1990s, there was a strengthening of multilateral interaction and interconnectedness in the global governance landscape. As the EU, WTO and the World Bank involved in educational issues, there was a development in the 1980s and 1990s towards a high emphasis

¹ Stiglitz has also outlined four other global public goods: international economic stability, international security (political stability), the international environment and international humanitarian assistance.

on neoliberal policy reforms for education (Mundy 2002). Multilateral organisations thus became very important actors in what can be described as new governance processes that pushed educational politics into the realms of supranational governance (Dale 2003).

Dale (2005) describes this new and fragmented area of educational governance as *pluri-scalar*. After the Second World War, the expansion of educational was mainly driven by individual governments and by the idea of education as a right. The growing role of private authority and neoliberal ideologies has increased educational governance on the supranational level. Mundy (2007) argues that the current educational multilateralism is best described as “a series of governance experiments at a variety of scales, each engendering new forms of political contest around both the normative logic of education and the strategic interest of states and other collective actors”. Thus, the question of “who governs” can no longer be viewed only by looking at national governments and the characteristics of the education politics. Educational multilateralism is in fact part of a wider and “global public domain” (Ruggie 2004). Such questions put into actualization the dissemination of broader ideas and discourses; what the hegemonic understandings are, how they are constructed and also what ideas and discourses seem to be downplayed. By to a greater extent focusing on ideas and interaction, a constructivist approach should be able to give a rich and compelling insight into the changes in this policy field. Such aspects are often ignored or less emphasized by rational theories.

1.3 Theoretical approach

The study of international organizations and their role in international relations has grown in recent years. Martens (2005) distinguishes two main foci in the study of IOs; one group of scholars focus on questions of how and by what means international organizations operate in international relations (Barnett and Finnemore 2004; Finnemore and Sikkink 1998), while the other group of scholars explore the conditions that IOs operate under in international politics and why delegation to IOs occurs in the first place. The second approach would, for example, seek to explore reasons and motives as to why states transfer authority to an international organization. Theories within this rational paradigm would take a more realistic stance, while the first direction is placed within the constructivist paradigm. The constructivists focus on how IOs operate; on “how IOs (1) classify the world, creating

categories of actors and action, (2) fix meanings in the social world; and (3) articulate and diffuse new norms, principals, and actors around the globe” (Barnett and Finnemore 1999:710). The focus of this study is within this constructivist paradigm, and will be elaborated on in chapter two. It will also aim to show how a constructivist approach offers important insights into the OECD work. Rationalist theories will also be briefly outlined, as they will be applied in the discussion when they are helpful in understanding the interconnectedness between IOs and national policy making.

1.4 Research question

Against the backdrop of the increasing influence of international organizations in the field of education in the last decade, the aim of this study is to investigate prominent discourses and present trends in the work of the OECD in this area, and to discuss how governance is exercised by the organization. There is also an aim to show how a constructivist approach can be fruitful in the study of IO governance. To examine this field, the main research questions in this study are:

What are the prominent discourses within the OECD work in the field of education?

How does the dissemination of ideas have an impact on education policy making?

The research question will be examined through text analysis and a discussion based on theoretical contributions. Examples from Norway and South Africa will work as a kind of case studies on the relationship to OECD. Discourse analysis is used as a practical tool for the text analysis, and a theoretical discussion will be applied as another analytical strategy. Theoretical contributions will also form an important part of the data material in this study.

1.5 Outline of the thesis

In chapter two, the concept of governance and the different theories within IR will be outlined, with a specific emphasis on the constructivist approach. In chapter three, the methodological framework of discourse analysis is described. Chapter four analyses the prominent educational discourses within the OECD. A discussion on educational governance is carried out in chapter five, while chapter six summarizes the main findings in this study.

2. The concept of governance

The term governance was originally synonymous with government. Government suggests formal legal authority, police powers and territorial legitimacy, while governance refers to purposeful and goal-oriented processes and institutions (both formal and informal) which guide and restrain the collective activities of a group. There is reason to believe that the engagement of IOs in the field of education leads to new forms of governance, which also strongly affect the diversity of national paths in education policy making, as the centre of gravity changes both politically and geographically. Leuze et al (2007) argue that these changes are fundamental, and that an international organization represents *new arenas of education governance*. As the nation state has historically provided the most important arena of educational policy making, the arena of IOs is gaining in importance.

In this chapter, different theories within International Relations will be presented. First, I will look into the term ‘governance’ and ‘global governance’, then I will briefly outline the rationalist theories in international relations, before going more in depth in the constructivist paradigm. The theoretical approaches all try to explain why nation states involve in the work of an international organization, such as the OECD, and will be applied in a theoretical discussion in chapter five.

2.1 Global governance

Governance can be defined as the process and outcome of policy making shared by various actors, who interact in a non-hierarchical way (Héritier 2002). In this perspective, policy making is viewed as a series of independent activities that are not necessarily performed by the state (Dale 2005). Thus governance can be

seen as the pattern or structure that emerges in a socio-political system as a ‘common’ result or outcome of the interacting intervention efforts of all involved actors. This pattern cannot be reduced to one actor or group of actors in particular. (Kooiman 1993:258)

Governance then refers to a new meaning of government and new processes of governing; “governance refers to self-organizing, inter-organizational networks characterized by interdependence, resource exchange, rules of the game and significant autonomy from the

state” (Rhodes 1997:15). To summarize, the concept of governance refers to the sum of modes of governing through formal and informal ways of regulating social processes (Héritier 2002), and in this sense, it also expresses the capacity of IOs to develop, share and shape policy-making in international relations (Martens and Balzer 2004).

Rosenau (1992) describes the shift from government to governance and how this development takes place also at the global level; hence the development of the term global governance. One could thus say that the development of a huge number of international organizations actually has led to the emergence of the idea of global governance. International organizations represent in many ways a shift from nation states to organizations, and they are often coordinated from multiple sites. In this situation, it has been necessary to build norms and regulations around how to act in these relationships. The development of international organizations also leads to new structures within national government structures. Turning to education policy, Lawn and Lingard (2001) describe how governance includes significant actors and processes, relationships with and between states, regional and local actors and markets. Leuze et al (2007) argue that the increasing engagement of IOs in the field of education provides a new form of educational governance. One example is how IOs are increasingly active at the level of agenda setting (Finnemore and Sikkink 1998). Through coordination and distributions of policy papers, research and statistics, IOs set benchmarks. In addition, international organizations are very active through the organization of conferences, where professional networks are created and thus support an elite in the field of education policy (Martens and Balzer 2007). IOs often employ highly skilled professionals and who are capable of providing so-called objective and effective solutions to national problems. As the organizations transcend national borders, they gain an overall view to identify present and common trends with following comprehensive responses to more global challenges (Finnemore 1993).

2.1.1 Implications for national governance

The governance of international organizations consequently has implications for national policy making. Just by being a member of an international organization, a state is exposed to IO governance. This can be through binding regulations, moral and normative obligations to common values or indirect adherence to agreed upon standards. In many cases, states approach IOs with specific tasks and also instruments with which to conduct governance.

Education policy making has become an important policy field in many industrialized countries, apparently with close connections to an emphasis on the knowledge-based economy. This will be further analyzed in chapter four. The trend is thus that the policy field of education seems to have moved up on the political agenda, both on a national level and on an international level.

2.2 Theoretical frameworks

In the time of internationalism, international relations were concerned with state to state relations and with the transnational challenge (Nye and Keohane 1972). International organizations had mainly focused on issues like war and trade, and globalization thus led to a rethinking around international organizations and their role in terms of governance.

Robertson (2009) describes the following global governance paradigms; realist, neo-realist, marxist, neo-marxist and constructivist. She places institutionalism under the constructivist paradigm. Hereafter, the theoretical frameworks will be briefly described, followed by a more in-depth presentation of the constructivist research program, of which is the main theoretical perspective used in this study. Other theories of international relations may however give brief insights in possible alternative explanations.

2.2.1 (Neo-) Realism

Although classical realism was mainly focused on power as derived from the military, power is also now increasingly derived from trade. Neo-realists would argue that power is derived from asymmetries between players and that setting agendas is an important source of power affording an ability to structure the preferences of actors (Robertson 2009). Nye and Keohane (2000) highlight how globalization is not a new concept, but that the density of globalism is new. Thus, globalization will affect governance and vice versa. Nye and Keohane (2000) describe a world involving networks of interdependence, but at multi-continental distances. Such networks are linked through the flow and influence of capital and goods, information and ideas and people.

Governance refers to the emergence and recognition of principles, norms, rules and procedures that both provide standards of acceptable behavior that are followed sufficiently to produce behavior regularities. Governance (...) need not be conducted by governments – international organizations, private firms, associations of firms, NGOs and associations of NGOs, all engage in it. (Nye og Keohane 2000)

At the same time, neo-realists such as Nye and Keohane will emphasize, not to overstate the case, that national governing is still strong and powerful. They state that it is hard to argue a homogenous effect of globalization, but that it will be dependent on local and national conditions as globalization interacts with domestic politics. Also, Nye and Keohane highlight that globalization does not necessarily weaken state institutions. However, according to neo-realism, the decentralized nature of international relations leads to the need for states to have an international system to overcome coordination challenges. If states succeed in breaking the rational strategy of non-cooperation, they can capture the gains that may become available through international cooperation (Iga 2002).

2.2.2 (Neo-) Liberalism

In recent decades, economic neo-liberalism has been dominating the political arena. Global welfare is seen to be maximized through open markets, and the policies of neo-liberalism have almost become the rationale of an international consensus (Apple 2001). With more specific relevance to IR, there are mainly two liberal responses to the problems and possibilities posed by globalization; neo-liberalism and radical liberalism. The core assumptions in liberalism; juridical equality, democracy, liberty and the free market, can however be pursued by very different political strategies (Baylis and Smith 2005). Neo-liberalism highlights free markets, free competition, minimal state intervention, minimal international rules and relatively weak institutions. Economic growth but uneven distribution and more instability are obvious consequences of this version of neo-liberalism, while those of radical liberalism seeks to regulate and to strengthen international institutions, making them more democratic and accountable for the negative consequences of globalization.

The civilizing capacity of global society is essential for radical liberals, and one example of this is the rise of social movements. Radical liberalism would thus be an antithesis to the status-quo orientated world view of neo-liberals (Baylis and Smith 2005). Radical liberalism has been criticized by neo-liberals as utopian and naive. Neo-liberals criticize radical liberals for their ideas, calling it to go backwards with regards to economic development. Radical liberalists for their own part, would answer this question by, for example, asking the question about development and if we define development only by economic growth. Radical liberalism is also criticized for the ideas about how great a civilizing effect global civil society may be able to exert upon a capitalist system (Baylis and Smith 2005). The

debate between neo-realism and neo-liberalism replies to this discussion as well. Neo-realists are critical towards the somewhat broader view on world politics and the belief in cooperation in areas of mutual interest, while neo-liberalists criticize the big emphasis on power and security and are more concerned about economic welfare or international political economy issues and other non-military issues, of which education would be one such issue.

2.2.3 (Neo-) Marxism

Neo-marxism is concerned with power, production and world order (Cox 1997), and relies heavily on the work of Antonio Gramsci in order to explain hegemony, world order and change. Cox (1997) views historical structures and the historical bloc as consisting of social forces, forms of the state and world order, seeing change as generated through ideas, institutions and material capabilities. He describes the 1990s as being a *nebuleuse*, a cloud of ideological influences that fostered the realignment of elite thinking to the needs of the world market in a new historical bloc. Cox (1997), amongst others, argues that the ideological face of institutions and the elite social forces that have gained an advantage in the new set of social forces. The idea of hegemony is central in neo-marxism - the hegemony of state (political society), social classes and civil society. There is a delicate and shifting balance between coercion and consent, and hegemony hence operates dialectically, between consent and coercion. Neo-marxists emphasize the role of intellectuals in brokering hegemony.

Both neo-realism and neo-liberalism acknowledge that there is an extra gain from an open market trade system for all countries, while neo-marxism argue that the current international trade system is only constructed to benefit developed nation states (Iga 2002). The developing countries on the other hand, are exploited on the basis of this system (Wallerstein 1979). Dependency theory emphasizes how the world economic system can be understood as a core-periphery structure, where developed countries gain and the more peripheral countries lose. Thus, the international system exploits and serves to maintain or even increase the inequality between states. Neo-marxism argues that international organizations may serve a role primarily preserving their interests and also take advantages of developing countries.

2.3 Constructivism in IR

Constructivism must be viewed as both a more general social theory and as an IR theory. Berger and Luckmann's (1966) *The Social Construction of Reality* is a classic book within the social theory of constructivism, and the authors' main concern is how we as human beings create our own reality and how we can only gain knowledge about society through examining human actions. The social world is a product of our own actions, and thus we need to explain how this social construction occurs. Also, because constructivism proposes a variety of perspectives, there are maybe reasons to regard constructivism more as an approach rather than a fully-fledged theory (Stephan 2004). Finnemore and Sikkink (2001) define constructivism as an approach to social analysis that deals with the role of human consciousness in social life, and that human interaction first and foremost is shaped by ideational factors. Such factors cannot be reduced to individuals, but are widely shared and construct the interests of purposive actors.

Constructivists within IR therefore mainly focus on the role of ideas, norms, knowledge, culture and argument in politics. Constructivist research² has become more and more popular in the last two decades (Finnemore and Sikkink 2001), and is a different kind of theory from realism, liberalism and marxism. Constructivism portrays itself as positioned in-between rationalism (neo-realism, neo-liberalism and marxism) and alternative approaches such as post-modernism. While much IR theory, and especially realism, is materialist, constructivists hold an ideational view and reject a one-sided focus on material aspects of international relations. Constructivism is however similar to rational choice theory in the way that it offers a framework for thinking about social life and interaction, but it makes no claims about their specific content. It does not say anything about social structures or the nature of agents or produce specific predictions about political outcomes.

Constructivists focus on how language³ and rhetoric are used to construct the social reality, and in international relations this social reality would be the international system. The role of

² Constructivism focuses on issues and not on competing constructivist theories, and is thus not in a war such as that between realism and liberalism.

³ Constructivists may apply a variety of methodological tools in order to capture intersubjective meaning and ideas, of which discourse analysis may be one practical tool for analysis.

ideas is seen as crucial in the shaping of the international system. Ideas could be identities, goals, fears etc., or basically all elements that influence states and non-state actors within the international system. Further, a main assumption within constructivism is that state identity fundamentally shapes state preferences and actions. Constructivists argue that state identities are constructed within the social environment of international and domestic politics (Wendt 1992; Katzenstein 1996). They would however disagree on the weight of international versus domestic environments in shaping state identities. Wendt's systemic constructivism in particular, emphasizes the impact of the international environment, while Katzenstein (1996) views identity as mainly a domestic attribute. The term identity is in itself a troublesome term, and defined in many different ways. Wendt (1999) argues that identities are rooted in an actor's (subjective) self-understandings, but are also dependent on whether or not that identity is recognized by other actors. Identities are thus defined by the interaction of such internal and external ideas. Most scholars view identity as socially constructed, but that states may strategically construct their identities from a more limited group of identities that are appropriate at a given historical moment (Laitin 1998). Consequently and as an ontological assumption, constructivists view actors as shaped by their social milieu and a central question is how this shaping happens and with what results. Identities and interests can not be taken for granted, and understanding the processes and change is a central part of the constructivist research program. What causes political outcomes?

Many constructivists have focused on the role of international organizations when investigating new international norms and models of political organization, and Finnemore (1993) describes this as IO's teaching states new values and norms of behavior. Organizations work as effective agents because they embody a somewhat legitimate and perceived authority. The political effect of organizations can be related to what is described as epistemic communities (Haas 1992). Epistemic communities often disseminate new norms and understandings and consequently act as powerful mechanisms of social construction. Such expertise often resides within formal organizations (Finnemore and Sikkink 2001), and international organizations are often staffed by people with specialized knowledge. What is described as the literature of ideas particularly asks three main questions: how do new ideas emerge and rise to prominence, how do ideas become institutionalized and take on a life on their own and lastly, how, why and when do ideas matter in any particular circumstance? Comparativists argue that the strength and continuity

of new ideas often depends on whether and how they are embodied in institutions. Successful implementation is also connected to learning within institutions, and such learning includes interaction with domestic and international actors, comparison with prior national experiences and with other countries' experiences, reflection including internal debates and self-criticism and change of personnel (McCoy 2000). Constructivism argues that the involvement in the work of international organizations can be viewed as a compromise between domestic and international political orders. Constructivism is also described as embedded liberalism, arguing that nations use internationally institutionalized norms in order to satisfy domestic concerns (Ruggie 1995).

2.3.1 New Institutionalism

Constructivism is closely related to institutionalism, even if liberalism appears to be the basic ideology in what can be described as new institutionalism. Applying institutional theory on international organizations, key questions are first how institutions affect political behavior and second, how national governments interact with international organizations; "how does the institution shape the behavior of its component parts (states) and how do these component parts shape the behavior of the larger system?" (Peters 1999:134-135). International institutionalism receives considerable attention in the social sciences, as it emphasizes the global dissemination of principles, models and institutionalized ideology. In general, institutions are considered to provide a kind of structure in which different actors can act. This structure may then give the actors a sense of direction for their behavior. The new institutionalist conception is by many scholars seen to offer empirically well-grounded and intellectually inspiring explanations for the worldwide convergence of patterns of e.g. knowledge and education policies. How have education policies been institutionalized in national governments and public administration? What factors can explain the choices that have been made in this regard? Who carries policy models around the world, and where do these models come from? How do environments supply the "blueprints and building blocks" for more local structures?

These are questions that can be addressed by applying new institutionalist theory, and specifically by extracting major components and dimensions out of the concept of governance. The concept of governance refers to the sum of the modes of governing through formal as well as informal types of regulating social processes. It also expresses the capacity

of international organizations to develop and shape policy-making in international relations. Martens and Balzer (2004) distinguish between three dimensions of governance as exercised by IOs; governance by coordination, governance by opinion formation and governance by instruments. These dimensions will be used in the discussion in chapter five.

Meyer and Rowan (2006) focus on the development of a world polity as an expression of liberal norms. Based on these norms, social construction happens. Finnemore (1996) and Ruggie (1998) also view global polity as dialogical phenomena, as states of affairs created by international actors in their interaction. However, states remain very powerful. Murphy (2000) states that:

The global polity is not simply a superstructure responding to the interests of an already differentiated global ruling class. Global governance is more a site, one of many sites, in which struggles over wealth, power and knowledge are taking place. (Murphy 2000:799)

Institutionalists would thus argue that global governance structures are both advancing the interests of globalizing capital and in turn constituting the global, while at the same time demanding the need for institutions to institutionalize and stabilize such new developments. Institutionalism focuses less on economic efficiency, coordination problems and core-peripheral world structure as on the justification for international cooperation. Rather, involvement in the work of international organizations may be an opportunity to demonstrate compliance with international norms. Meyer (1997) emphasizes how a world society model has implicit or explicit sets of principles, norms, rules and decision-making procedures which converge in certain areas of international relations and influence national behavior. To gain legitimacy and credibility as a responsible international actor, a nation would want to follow such principles, norms and values.

2.4 Summary

This chapter has aimed to give a brief theoretical background and context for the analysis of the OECD documents in chapter four and a theoretical discussion in chapter five. The theoretical approaches all try to explain why nation states are making the efforts they are and why they are involved in the work of international organisations, and a discussion more specifically related to OECD and the policy field of education will be one of the analytical approaches in this study.

3. Methodological considerations

The study aims to examine the present trends of OECD work in the field of education and how international organizations influence policy making. The constructivist paradigm within International Relations is the theoretical framework for this study. The scientific viewpoint is what can be described as meaning construction, or how we as social actors give meaning to reality through relating phenomenon to each other and by identifying with certain ways of looking at the world around us. Such a social constructive perspective (Berger and Luckmann 1966, Burr 1995) is thus the scientific and analytical focus in the study, and within this frame, the discourse perspective is viewed as appropriate as a practical tool for analysis. By choosing a social constructive and discourse analytic position, constructions of meaning can be examined and discussed.

3.1 A social constructivist position

Berger and Luckmann (2000) state that the starting point for a social constructivist analysis is grounded in the view that reality is created by society, and that we have to analyze the processes in which we can find this is happening. Thus, an additional aim of this study is to explain why social construction takes place. Communication between people happens mainly through the use of language, and Berger and Luckmann (2000) emphasize how reality is thus constructed and constituted through the use of language. By taking a social constructivist point of departure, the object of study is viewed as something that is constructed and that is ambiguous. An important critique of social constructivism as a theoretical starting point, is concerned with the proposition that actions and phenomena become reality only through the use of language. Thus, critics of social constructivism would argue that it is both unrealistic and relativistic (Hellesnes 2001). At the same time, Giddens (2001) describes how analysis and documentation of construction processes are important, especially in a society in flux, and he defines social constructivism as the theory that social reality is a result of the social interaction between groups and individuals. Social constructivism is thus also a broad term that encompasses several directions. The understanding of the role of the language in social interaction (Säljö 1999) is important for the social constructivist and discursive approach.

Social constructivist research is also often oriented towards pragmatic and political aims; “a search not for the truth but for the usefulness that the researcher’s reading of a phenomena might have for those who need it” (Burr 1995:162). A social constructivist approach to the study of IO initiatives in the field of education should be able to extend the reader’s understanding of the phenomenon and at the same time contribute to reflection within this field of knowledge.

3.2 Discourse

People who share the same views, values or ideas are all a part of a discourse. We reproduce different ways of perceiving the world through how we speak, read, write or act. Discourses produce “truths” about the world, and a discourse analysis can be said to be an analysis of processes where people create and give meaning to reality. Through discourse analysis, the term discourse is used to define, explain and question challenges within different areas. Howarth (2000) argues how the term is increasingly used within modern social sciences and in different subject areas. It has become somewhat fashionable and may be used in a rather undefined way and it is important to clarify its meaning within this study. Neumann (2001) defines discourse as a system of generating ideas and practices that, by entering institutions and appearing more or less normal, work as constituting for its carriers and that has a certain degree of regularity within social relations. He argues that the main idea of conducting a discourse analysis is to examine meaning within the social, because it is in the social and through the use of language that meaning is created. Language is not just a channel where information is communicated, but we also make constructions of social reality through the use of language (Winther Jørgensen and Phillips 1999).

Neumann (2001) defines discourse analysis as a way of analyzing language and material holistically. Thus, discourse analysis is viewed as the study of meaning that is created through both language and action. This also makes discourse analysis a framework of analysis that can be used in relation to different themes.

3.3 The discourse theory of Laclau and Mouffe

The theoretical framework structured around the discourse of Ernesto Laclau and Chantal Mouffe makes an attempt to include the total practice and meaning that contribute in forming a certain community of social actors (Howarth 2000). Within discourse theory, two assumptions about the term discourse are made. First, only language can supply meaning to the social, and when a term is used, a meaning is also established (Thomsen 2005). This often involves value-loaded choices, and the connection between language and politics become clear. Second, language is central in terms of human knowledge and cognition, as we realize and understand the social world through its mechanisms. Thus, Laclau and Mouffe (2002) argue language and reality to be an entity, and that the establishment of a term with a certain content is not something that is defined beforehand, but on the contrary is a result of a process (Laclau and Mouffe 2002). The discourse term of Laclau and Mouffe thus not only includes language, but all social phenomena. Here, they have an alternative understanding than that of Foucault for example, who makes a distinction between the discursive and the non-discursive.

Language is established both as a medium of understanding and a medium for action, and phenomena are consequently something we first can relate to through a linguistically constituted meaning of the term (Thomsen 2005). The discourses are publicly available, but with incomplete meaning (Laclau and Mouffe 2002). Therefore, it is a task for discourse analysis to more closely examine the construction and the function of discourses.

3.3.1 Discursive formation and articulation

We attempt to gain understanding of social phenomena by creating structures that are meaningful to us. The notion of a discursive structure or formation implies the need for the term practice of articulation, meaning that a term does not explain much unless it is put in relation to other signs to give meaning. Both institutions and actors are included in discursive articulations. An articulation may thus try to change relations between terms and establish new meanings in a certain section of social reality (Thomsen 2005). Discourse is then the result of the practice of articulation (Laclau and Mouffe 2002). Central terms in discourse theory are elements, moments and nodal points, respectively. Elements are signs not yet in a discursive formation, while moments are attached signs in a discursive

formation. Moments are signs for social conditions that have been established in a certain discourse, and if moments are removed from a discourse, it changes character. The discourse would try to make elements moments by its reducing ambiguity to clarity. This transition is however never total (Laclau and Mouffe 2002). There will always be forces that are defined in opposition to the hegemonic (Howarth 2000), understandings that are viewed as alternative descriptions of reality. Such understandings are then a part of a discursive field.

A certain discourse will be an attempt to dominate the discursive field, to transform elements to moments and to construct a center. This center is named a nodal point (Winther Jørgensen and Phillips 1999). A nodal point is a moment that receives a status as universal and that attaches to other moments around it. At the same time, nodal points are elements as they need to be placed in a certain discourse in order to give meaning. The nodal point is a central conception that creates a more holistic understanding (Laclau and Mouffe 2002), and the relations between the elements in the discourse ultimately forms our construction of meaning. Elements that are especially open for definition are named floating signifiers, signs that different discourses want to define in different ways. A nodal point in one discourse, can be a floating signifier between discourses.

3.3.2 The unique position of politics

Thomsen (2005) views nodal points as an especially relevant analytical category with reference to political texts, because political messages are oriented around such nodal points. Within political ideologies it will always be possible to identify certain nodal points that are being upheld by other terms. In this sense, a nodal point is a symbolic and so-called navigation centre that can be highly influential towards the construction of meaning that goes on within well established discourses (Thomsen 2005). Thomsen (2005) highlights how the tools that are included in political practice first and foremost are of linguistic character, and how language is holds an especially important role in political conflicts (Thomsen 2005). Language is viewed as a very important political tool, where social actors create alliances, formulates new visions and strategies for the development in society. When political articulations are looked upon as decisive in terms of how we act and think, political processes thus become very important within discourse theory. Every social practice is articular (Laclau og Mouffe 2002), and social systems have a fundamental political character

(Howarth 2000). Three dimensions are introduced in Laclau and Mouffes political theory on discourse; social antagonists, political subjectivity and hegemony.

Social systems are always understood as political constructions that also include the construction of antagonists. Antagonistic understandings happen when parties do not accept the other's identity or point of view (Laclau and Mouffe 2002), and political subjectivity involves how social actors act (Howarth 2000). Thus, the individual is not first and foremost determined by the structure, but is viewed as an actor. However, through identifying with different political projects and discourses, the individual is influenced in certain ways, and political subjectivity comes into existence (Howarth 2000). This may also apply to how states come to identify with different political discourses.

Hegemony is closely related to processes of legitimization. Hegemony arises from the practice of articulation, where elements are not still established as moments. Discourse theory describe hegemony as a form of politics (Laclau og Mouffe 2002), and involves the creating of (a new) language, new world views and mobilizing for support of such new understandings. Legitimizing is thus an expression for both an ideological construction and a political mobilization process. The aim of such processes will be to push other world views away and make them politically ineffectual. In this process, ideas from ignored understandings are used in order to legitimize new understanding (Thomsen 2005). At the same time, dominating understandings may be deconstructed if competing discourses illustrate how signs could be related in other ways (Laclau and Mouffe 2002).

In Laclau's more recent work he has emphasized how the unpredictability of the elements become greater in late modernity, and he introduces the concepts of myth and social imagination to examine more recent forms of representation. Such representations can be transformed into collective images (Howarth 2000). The media will play an important role in this, which also emphasizes how influence is not only situated in formal decision-making.

3.4 A qualitative study

The study can be described as a qualitative study where discourse analysis will be used as a practical tool of analysis (Winther Jørgensen and Phillips 1999). This discourse analysis covers both theoretical and methodological perspectives, which are difficult to separate from

each other. To use discourse analysis as a practical tool for analysis would seem to fit well within the constructivist paradigm, even if discourse theory may be placed under postmodernism. Hence, the constructivist approach has been adopted as the main theoretical framework, both as a broader social theory as well a theory of IR. In chapter four a discourse analysis of OECD documents will be conducted, and in chapter five, a theoretical discussion will be undertaken with another analytical approach, used to address the research questions.

The texts to be analyzed are selected on the basis of content (Mathisen 1997). Prominent discourses in OECD work in the field of education are mainly carried out through an analysis of web pages and other relevant documentation. In particular, the OECD booklet *Trends shaping education 2008* is analyzed in more detail. In addition, policy documents from Norway and South Africa are to a certain extent used, first and foremost as examples.

3.5 Validity

Winther Jørgensen and Phillips (1999) describe how connection and coherence is one way of assessing whether a discourse analysis is valid, that is, if terms and analytical assertions are in accordance. Accordance and consistency are also emphasized by Guba and Lincoln (1985). This applies to the relation between theoretical framework and more practical methods of analysis as well as the operationalization of discourse terms. Such aspects have been emphasized by including a chapter on methodological considerations. Another way of assessing validity is to assess the productivity of the study and how the frame of analysis manages to explain and also create new explanations (Potter and Wetherell 1987). Silverman describes how a gold standard for qualitative research demands answers on the following two questions: “Have the researchers demonstrated successfully that we should believe them?” and “Does the research problem tackled have theoretical and/or practical significance?” (Silverman 2001:189). Discourse analytical tools are important in order to open up new understandings of the phenomenon that are studied, and to prevent a more superficial and casual reading of the documents. In this sense, choice of theoretical framework and use of discourse analysis hold the possibility of contributing to more knowledge in this area. Finally, reflexivity around the researcher’s own role in the research process will enhance validity in the study, and has been emphasized where possible throughout the research process.

4. The dissemination of ideas

In this chapter, the following research question is addressed: What are the prominent discourses within the OECD work in the field of education? First, the context of OECD as an international organization will be presented. Present trends within the OECD field of education are analyzed, mainly based on an analysis of the document *Trends Shaping Education 2008*, a book “designed to help policy makers, managers and practitioners in education to think about developments like these and to support long-term strategic thinking in education” (OECD 2008). Also, the website on “Global Forum in Education” will be briefly analyzed. Based on this analysis, prominent trends and discourses will be presented and further discussed.

4.1 OECD

Organisation for Economic Co-operation and Development (OECD) was established in 1961 (known as the OEEC until 1948), with the original purpose of supporting the reconstruction of Europe after the Second World War. The OECD’s utility as a meeting point for Western nation states during the Cold War ensured its continuation even beyond reconstruction (Mundy 2007). Originally, twenty countries signed the Convention on the Organization for Economic Co-operation and Development on the 14th of December 1960. Since then, a further ten countries⁴ have become members of the OECD (www.oecd.org, accessed July 2009). However, over 100 countries are involved when the OECD share expertise, and there are currently several countries in the process of becoming members of the organization. The OECD describes its main task as the provision of “a setting where governments compare policy experiences, seek answers to common problems, identify good practices and coordinate domestic and international policies.” Commitment to democracy and the market economy is emphasized, and the organisation’s aims are to bring governments together in order to support sustainable economic growth, boost employment, raise living standards, maintain financial stability, and assist other countries’ economic development and to contribute to growth in world trade (www.oecd.org). OECD has since its beginning been

⁴ Also Chile became a member in January 2010.

involved in creating comparable statistics and exchanging social and economic data. This work is described as the monitoring of trends and analysis of economic and social developments and changes. This also makes the OECD one of the largest publishers in the field of economics and public policy. The activities are funded by member states with special allocations from individual governments.

The OECD was created without any formal mandate in education (Mundy 2007). During the 1980s, OECD work within education grew in scope and influence, as the OECD in general became the prominent forum for the discussions around economic adjustment and reform. UNESCO, having been the most influential international actor in the field of education, was displaced by the OECD as the central forum for education policy coordination amongst advanced capitalist countries (Mundy 2007). Today, the OECD secretariat together with the Centre for Educational Research and Innovation (CERI) produces comparative country reports, thematic reviews, educational statistics and international comparative assessment studies. Such publications receive much attention, also from outside OECD member countries. Mundy (2007) describes the nature of the OECD educational mandate as to assist members in achieving lifelong learning of high quality and contributing to sustainable economic growth, social cohesion and personal development. Furthermore, the OECD supports research, information sharing and policy dialogue amongst OECD members, it gathers transnational statistics and indicators of educational systems and sponsors standardized assessments such as PISA. It thereby facilitates comparisons between states and the contribution towards policy dialogue regarding the restructuring of teacher's work and careers.

4.2 “Trends shaping education”

The text *Trends shaping education* is written within the OECD Centre for Educational Research and Innovation. The book is presented as follows: “It fills an important need: decision makers and practitioners in education often have only anecdotal or local information on the trends shaping education; too often they do not have solid facts in front of them.” It presents 26 trends which are grouped into 9 broader themes. There is a two-page spread with an introduction, two figures with accompanying text and three questions about the impact of the trend on the future of education. What understandings are dominant? This

question is the main focus of the analysis in this chapter, and the use of elements from discourse theory will be applied as a more practical tool for analysis.

4.3 Globalization as a nodal point

On the text level, the word globalization is prominent throughout the whole document, and serves the role as what Laclau and Mouffe (2002) describe as a nodal point, terms that seem to gather other elements around them, but at the same time are often diffuse terms and open to different meanings. All nine chapters in the document are related to globalization in some way or other, and the word global is very often used. Even if geographical, cultural and social differences are discussed, the emphasis is placed on what is described as global challenges or global patterns. Even if all chapters include questions for discussion, there is little use of modality in the text. A kind of certainty is communicated, and emphasized by the use of statistical figures from different OECD sources. Furthermore, only OECD sources are being used, which would emphasize the role of OECD as an expert and provider of scientific information and knowledge. Thus, there is little discussion around what globalization might be, but more around the aspects and effects of globalization as it is documented in quantitative data. This said, definitions of globalization often follow different points of view on the phenomenon.

4.3.1 Discourses on globalization

Fairclough (2006) describes four different positions on globalization within academic literature; objectivist, rhetorist, ideologist and social constructivist. The so-called objectivist (Bourdieu and Wacquant 1992:7) position sees globalization simply as an objective process in the real world, and that it is the social scientist's task to describe these processes (Fairclough 2006:15). The subjective aspect is downplayed, and recognition of the discourse is limited. While globalization as discourse is recognized, the rhetorist position emphasizes how discourse is strategically used in a rhetorical way to legitimize particular courses of action (Hay and Rosamond 2002). An ideological position is concerned with a more systemic level of how discourses contribute in achieving and sustaining the dominance of particular practices, and where ideology is a significant aspect of this construction. Fairclough (2006) emphasizes how the social constructivist position places a more explicit emphasis on the socially constructed character of social realities and thus the significance of

discourse in their social construction. This recognition of the socially constructed character of social realities is common in many social sciences positions (Sayer 2000). Fairclough (2006) also emphasizes how there is also recognition of discourse in the social construction of globalization amongst those who primarily adopt other positions on globalization.

In the OECD document however, there does not seem to be an emphasis on the aspect of different discourses on globalization, and it rather seems that the objectivist position is prominent. Trying to define globalization, Robertson (2009) refers to Dicken (1986), who describes how the world is changing from being marked by internalization towards globalization. Activities across national boundaries have taken place over centuries, while the production, regulation, circulation, distribution and consumption across many borders are relatively new. In the post-war period, nation states have been protected as they have been dominant and the primary container of power. The changes that started to occur in the 1980s led to a shift in the centre of gravity. A new economic system developed and there has been a development towards less protective barriers around nation states. Held (2000) describes a few preliminary conclusions in the following way; it describes growing global interconnectedness, with globalization representing a significant shift in the spatial form of social relations so that the interaction between apparently local and global processes becomes increasingly important; it involves the organization and exercise of power at a global scale, globalization is a multi-dimensional process; it applies to the whole range of social relations – cultural, economic and political and lastly, it can be seen positively as well as pessimistically (Held 2000). An economic or technological starting point can be described as the foundation for large parts of the discussion around globalization as a phenomenon and also around its consequences. Held's definitions are widely used, and he is generally transformationalist and oriented towards the socially constructed character of social life, but says little about discourse (Fairclough 2006). Such a transformationalist view appears to be prominent also within the OECD.

Fairclough (2006) argues however that globalization is interpreted as changes in the areas where social activities take place, and that it is associated with the emergence of new scales on the global and regional arena. He argues that globalization has to do with these new set of scales (nation states, regions etc.) with respect to particular sub-systems (for example education). Actual changes in such sub-systems can be seen as the operationalization of images existing on the global scale. In this sense, discourse can represent globalization. It

can give people information and contribute to understanding of the phenomenon, but it can also misrepresent and mystify, it can be used rhetorically to project a particular view of globalization, it can reproduce ideologies and lastly, generate in its imagery representations of how the world will be (Fairclough 2006). Thus, there is a need to look at how the OECD uses the word rhetorically and how it can be used to advocate a certain view of globalization, what effects it has on the education sector and what responses that are needed. Further, globalization can be understood through many different elements, of which those that become emphasized can give much information of what is desirable.

4.3.2 Alternative discourses?

Debates around the future of the public sector often refer to the rising power of global markets, where the values of public service is eroding and replaced with a commitment to market-based competition (Haque 2001). This is also in line with Habermas' (1999) arguments that the public sector in many western states suffer from a kind of legitimization crises, and of which education is a central part. Some scholars would thus argue that globalization will drive fundamental change in public services that undermines the national public service, replacing them with a global market oriented regime (Spicer 2007). Meyer (1997) argues that the public sector is increasingly being standardized and that this is part of globalization processes. As a consequence, educational systems will become more similar across different countries. Investigating globalization as the dissemination of ideas is therefore interesting, and by treating globalization as a powerful language, it is possible to get a better understanding of how it shapes and constrains how we speak and act (Spicer 2007). Constraints can be put on us only by having trouble identifying alternative discourses, as pointed out by Mouffe (2002):

One of the reasons why I think there is no hope today for future possibility is precisely because people feel there is no alternative to the capitalist system, and even more to the neo-liberal form of capitalism which is dominant today. And the left is in great part responsible for that, because they seem to have capitulated to this dominance of capitalism and they are not thinking of another alternative ... for instance, there is a belief that because of globalization nothing is possible, and this becomes the dominant discourse. (Mouffe 2002:135)

The role of the language of globalization hence plays an important role in the process it sets out to describe (Rosamond 2003), and the metaphors of globalization have been shown to play an important role in shaping patterns of legitimacy in for example education (Edwards, Nicoll and Tait 1999). Often, this could turn into a hybrid language of public service and

orientation towards the market. Spicer (2007) describes however how the language of globalization does not seem to lead to the destruction of the public sector, and that it is rather reinterpreted, modified and selectively taken up. Thus, his case analysis highlights the importance of the role played by struggles between competing actors in terms of shaping the language that we use. Such struggle is also then a struggle for legitimacy, and within one context, there will be contesting and often conflicting use of language (Spicer 2007).

In *Trends Shaping Education*, there is however little sign of such alternative interpretations and understandings of globalization. In the document, globalization is mainly connected to the knowledge society and knowledge economies. The impact of the global economy on the prosperity of nations is highlighted and has increased the importance of high quality education programs, and Brown, Lauder and Ashton (2008) describe these investments in knowledge and skills as highly competitive. The importance of education and a highly skilled workforce is also strongly emphasized by OECD in a forthcoming OECD study on the consequence of educational losses in a globalized world, and Andreas Schleicher, one of the authors, states that “in a whole row of countries, the economic losses are significantly higher than the costs of the financial crisis” (Newsweek 2009). This is also highlighted in the OECD report *Education at a Glance*, published in September 2009. The report emphasizes how going to university pays out in later life; through higher salaries, better health and less vulnerability to unemployment (OECD 2009). In addition, the report strongly emphasizes how governments must take account of this in planning their education policies. The OECD Secretary-General Angel Gurría says that “as we emerge from the global economic crisis, demand for university education will be higher than ever. To the extent that institutions are able to respond, investments in human capital will contribute to recovery” (www.oecd.org). Such statements must be related to the idea of what is often described as the knowledge-based economy.

4.4 The Knowledge-Based Economy (KBE)

Of the nine chapters in *Trends shaping education*, four chapters are directly connected to the knowledge-based economy; “Towards a new economic landscape”, “The Changing World of Work and Jobs”, “The learning society” and “ICT: The Next Generation”. Phrasings such as ‘learning society’, ‘knowledge society’ and ‘knowledge economies’ are used throughout the

document, closely related to the concept of change. The precise meaning of the knowledge-based economy is not clear, but the historical shift from the industrial economy to a range of changes in economic production that elevate knowledge to be partly above that of other productive factors (Fairclough 2006), are central to the understanding of the articulation of the term. KBE can be viewed as a strategy for economic change and also a new focus within the global economy. Further, it can be seen as a nodal discourse, which articulates with many other discourses, for example “human capital”, “intellectual capital”, “learning society”, “lifelong learning” etc., all amongst the themes of KBE (Fairclough 2006). These terms are also highlighted within the *Trends Shaping Education*, whether explicitly or more implicitly. The strategy or discourse is not however inherently globalist or neo-liberal, but can also be connected within a commitment such as social inclusion⁵ (Jessop 2004). This is also included in the OECD document, especially under chapters such as “Citizenship and the State”, “Social Connections and Values” and “Sustainable Affluence?”. This must be related to the role of education within its foundations of social equality, citizenship and democracy. The dominant emphasis on the knowledge-based economy must however first and foremost be viewed in relation to the development of a knowledge society and what is described as human capital theory.

4.4.1 The knowledge society

The American sociologist Daniel Bell had already in 1976 described the economic changes that may be the beginning of what we now label as knowledge society. Today, however, we no longer talk about knowledge just as growth or as a resource, as knowledge is constantly present in all parts of society. The term ‘knowledge society’ gives associations to learning, development, creativity, transmission of knowledge etc. In a world becoming more and more connected, the growth of a knowledge society must be seen as closely connected with globalization. Popkewitz (2004) emphasizes the key role of knowledge in globalization processes, and terms like knowledge society, information society, network society, hyper complex society and learning society are all expressions of globalization with reference to the production and transmission of knowledge. An economic or technological starting point is also the foundation for much of the discussion around globalization as a phenomenon.

⁵ Social inclusion has also been an important educational aim for the EU work in the field of education.

Castells (1996) describes this new society as the network society. Vital characteristics of this society are the globalization of strategic economic interests, of information technology, of flexibility and of an increasing individualization in professional life (Castells 1996). According to Castells, the foundation and driving forces in this development are to be found in the expansion and circulation of globalized electronic, data-based and digital information and entertainment.

In the industrial mode of development, the main source of productivity lies in the introduction of new energy resources (...) In the new, informational mode of development the source of productivity lies in the technology of knowledge generation, information processing, and symbol communication. To be sure, knowledge and information are critical elements in all modes of development (...) what is specific to the informational mode of development is the action of knowledge upon knowledge itself as the main source of productivity. (Castells 1996:16-17)

The fundamental resource will thus be the use of knowledge. The ability to utilize and adapt information becomes crucial, as access to information is not sufficient. In this sense, knowledge is no longer just a resource, it pervades all parts of the economic sphere (Hargreaves 2003). A knowledge society is hence associated with learning, development, creativity and education, and a high quality public education system is looked upon as definitive in the constant development of a knowledge society. International organizations such as the World Bank and UNESCO have thus been important actors in the development of initiatives and attempts at the growth of a knowledge society.

In *Trends shaping education*, the importance of new technologies and ICT is described in one chapter especially, but the general importance of knowledge and expertise is highlighted throughout the document. The orientation towards a greater emphasis on knowledge and education must be viewed in relation to the development of a knowledge society, an emphasis that is related to human capital theory (HCT).

4.4.2 Human Capital Theory

The idea of human capital and the causality between education and qualifications in the work force as well as between productivity and economic growth is not new, but in the modern

sense⁶, human capital theory (HCT) first emerged in the 1960s. Following the work of Theodore Schultz especially, there was an increasing concern for investment in education.

I propose to treat education as an investment in man and to treat its consequences as a form of capital. Since education becomes a part of the person receiving it, I shall refer to it as human capital (...) it is a form of capital if its renders a productive service of value to the economy. (Schultz 1960:571)

Thus, investment in education accounts for economic growth. Many scholars in the 1960s were writing about the major impact education had on economic growth, and consequently also emphasizing the importance of an improved education system. Human capital is hence also viewed as a tradable commodity capable of being organized according to the principles of market exchange (Olssen, Codd and O'Neill 2004). However, causality is not indisputable. Robinson (1999) argues how the causal connection between investment in education and economic growth is difficult to demonstrate empirically. In his studies, he has found no correlation between international scores and economic growth in a country. More recently, however, Hanushek and Woessmann (2007) published an extensive study that gives weight to the claim that there is a strong causal relationship between general education level and economic growth. One could thus argue that this understanding is quite well established. On the other hand, Stromquist (2005) emphasizes how education is only *one* factor in economic growth. She further questions the dominant discourse in which education is expected “to be the major tool for incorporation into the knowledge society and the technological economy” (Stromquist 2005:15).

In the OECD document, the importance of states being active in improving education is directly related to how “it enhances a country’s economic competitive edge”. The document also highlights how the change in economies has implications in the sense that “the global economy is increasingly knowledge-intensive”, and those services are becoming more important as industry and the primary sector shrink as sources of employment. Also, more is spent on research and development (R & D). Investments in education are to a greater extent premised on a political equation of high skills = high wages and the idea of a highly-skilled and high-waged economy is increasing in importance. Another aspect of human capital theory today is what Brown, Lauder and Ashton (2008) describe as a power shift, where the

⁶ Marginson (1993) argues that Human Capital Theory emerged from neoclassical economics in the second half of the nineteenth century as the economic science of predicting economic behavior was developed.

prosperity of individuals, companies and nations depends on human and intellectual capital, rather than issues of ownership defined within the Marxist account of the capitalist system. Friedman (2006) emphasizes what can be achieved by investing in the knowledge and skills of the workforce in the following way:

America, as a whole, will do fine in a flat world with free trade – provided it continues to churn out knowledge workers who are able to produce idea-based goods that can be sold globally and who are able to fill the knowledge jobs that will be created as we not only expand the global economy but connect all the knowledge pools in the world. There may be a limit to the number of good factory jobs in the world, but there is no limit to the number of idea-generating jobs in the world.

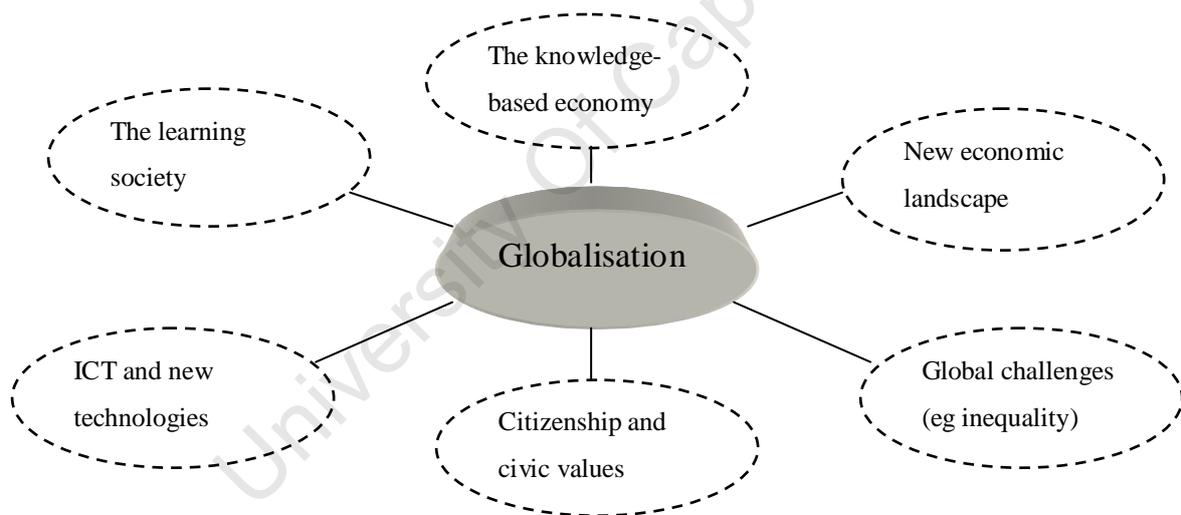
(Friedman 2006:230)

This understanding implies that there will be increased competition on knowledge and that today's advanced economies will become so-called magnet economies, also leading to migration and so-called brain drain from developing countries. In addition, these tendencies are also believed to change the relationship between nation-states, as the rise of a global knowledge-based economy is believed to remove much source of conflict between nations (Brown et al 2008). At the same time, many would argue that this would not lead to a win-win situation for both developing and developed nations, but rather on the contrary contribute to an increasing knowledge-gap. Again there is reason to question the different understandings of globalization and its effects, even if the discourse around globalization appears to be dominant within an IO such as the OECD.

4.5 A nodal discourse?

Trends shaping education 2008 places a great emphasis on globalization, in a more objectivist sense, and its effects or consequences with regards to education. A more social and civic perspective is also emphasized, but the prominent elements are related to more economic and instrumentalist perspectives. The discourse seems to be hegemonic, and is also emphasized through the extensive use of OECD statistics and quantitative data to document trends and patterns that require national responses. Using the framework of Laclau and Mouffe's discourse theory, the following model can visualize the nodal discourse within this document. The nodal point is globalization, a central element in a discourse that clusters other elements around itself within a discourse. It is a privileged element as it gathers a range of varying elements together into a discursive formation, and the nodal point creates and sustains the identity of a certain discourse by this construction of a knot of definite meanings (Torfing 1999). The nodal point and the discursive centre is also described as an empty

signifier, and the emptiness of the center is what makes the discourse possible. Globalization is not a term with any given content and thus, it is open to different interpretations. The nodal point and the empty signifier are thus closely connected to power. What are the dominating understandings, and who has got the power to define? To Laclau and Mouffe (2002), this is the actual driving force in politics, and the political struggle becomes a struggle of identification. In this discursive formation below, it is elements from a market liberal or neo-liberal order that are prominent. Other political ideologies would for example try to define globalization differently and give different meaning to the term, and such understandings would thus be antagonistic to the dominant discourse and serve the function of a floating signifier. When analysis shows that the elements gathering around the nodal point of globalization are closely related to the neo-liberal economic order, the hegemonic world-view within the OECD work in the field of education appears as evident.



4.5.1 Neo-liberalism

Neo-liberalism is in many ways insolubly fixed to the concept of globalization. On the discourse level, and as shown in the figure above, this creates and maintains a symbolic reality. In addition to the more economic aspects of neo-liberalism, it is interesting to look closer at the more social aims of equity and cohesion connected to the globalization discourse described above. One could say that neo-liberalism has changed the idea of equity, not abandoned it. Within the education sector, arguments for equity are presented in formulations

such as “ending the injustice of social promotion”, “holding all students to the same high standard”, “making students work hard”, “creating world class schools” (Stromquist 2002:28). These principles often exist parallel to the emphasis on the responsibility of parents, pupils, schools and teachers, and the belief that progress depends on individual effort and on individual solutions is prominent. Thus it is also assumed that governmental action is unnecessary and can even be harmful (Stromquist 2005). On the discourse level, education thus plays an integral part in achieving social mobility, under the belief that the market is non-discriminating. However, neoliberal regimes have never engaged in major wealth distribution and rather, neo-liberalism has to a greater extent emphasized privatization and liberalization. Neo-liberalism is thus an element related to globalization and the knowledge economy, as it promotes an understanding of the need of the market for highly skilled professionals to fuel knowledge and generate the development of knowledge societies.

What is then the impact of this globalization discourse, in terms of the dominant understandings of neo-liberalism and a knowledge economy, on education policy in general? There are in particular three measures that should be highlighted. Privatization and liberalization of schooling is one of the major mechanisms that have been justified on the basis of neo-liberalism and the urge to produce greater efficiency. The school system is no longer bound to a state monopoly, and there has been an increasingly relaxation of rules for the establishment of schools (Stromquist 2005). Privatization also means that education is increasingly treated as a commodity, a tendency that undermines education as a major terrain for the construction and development of a nation-state based on the values and norms of equity and solidarity. Lastly, liberalization and privatization have lead to an increase in parental shares and user fees. Decentralization is expected to generate more efficient schools. The underlying notion is to be able to better tailor schools to their local needs and thus reduce the need for centralized administration. However, evidence shows that only in a few cases has decentralization actually been accompanied by increased monetary resources, training for new roles and the allocation of decision-making prerogatives to the new decentralized units (Stromquist 2005). Lastly, the term quality is largely a part of neo-liberalism and the knowledge economy discourse, and must also be seen in relation to decentralization. Quality can be defined in different ways by different actors, but in relation to the neoliberal regime and to enhancing the efficiency and productivity of schooling, accountability and hence the testing of student performance comes to be highlighted. The term quality is also used

extensively in *Trends shaping education*, and in a sense creates a lexical reference throughout the text. This must also be seen in connection with the spread of New Public Management (NPM), a widely used term based on managerial schools of thought and a tool for enhancing efficiency in the public sector. In the education arena, the idea of NPM thus reflects a perspective that views restructuring, accountability, as well as the results and measurements of learning as solutions to both social and educational challenges (Stromquist 2002).

Trends shaping education does not explicitly go into these aspects of NPM, which can also be described as different tools of governance (Le Grand 2007). Much of the activities and programs within the OECD, as described on their website, can however to a different extent be related to neo-liberalism and types of governance within this paradigm. Elements from New Public Management are encouraged for example from comparative assessment studies. Also, quality appears to be a central element in OECD discourse in general, but also appears to be a floating signifier that is open for very different interpretations. Quality is often interpreted as educational performance, while in a broad sense it can be defined “as educational content that enables students to obtain the knowledge they require for the construction of an equitable social and economic world” (Stromquist 2005:19). Quality thus needs to be viewed in a broader sense than what is emphasized in the discourse of the knowledge economy. Equity is another such term. While equity is highlighted as a central element within neo-liberal paradigms, many would argue that such policies on the contrary contribute to raising inequalities, both within countries and between developing and developed countries.

4.6 Lifelong learning

With the emphasis on KBE, education has moved up on the political agenda. One term that has been especially prominent is the term lifelong learning, a term that has been highly promoted through national and international policies as a solution to the particular challenges to be overcome, emphasizing how knowledge is a critical factor in economic and social development. Lifelong learning (LLL) is in particular highlighted through international organizations such as the OECD, the EU, the World Bank and UNESCO, and used as a means to promote change within socio-political systems of governance, institutions of governance and institutions for education and training (Nicoll and Fejes 2006).

In “Trends Shaping Education”, lifelong learning as a term is not used so much in itself, but appears throughout the text as a term of central understanding. The fact that we are moving towards knowledge economies with the need to constantly acquire new knowledge and new skills is communicated. LLL is defined by the European Commission as “all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competence, within a personal, civic, social and/or employment-related perspective” (EC 2006). An obvious consequence of such policy aims is that educational opportunities should be available to all citizens on an ongoing basis, something that has first and foremost deep implications for higher education institutions and different forms of adult education.

LLL is however not a uniform theme within policy and it has emerged at different times with different emphasis. Three orientations have been suggested over the period from the 1970s; humanist, strong economist and soft economist. When the concept of lifelong learning emerged in the 1960s and 1970s in Europe, it was first and foremost promoted by UNESCO. The humanistic and holistic ideal was emphasized, focusing on the impact of lifelong learning on citizenship and democracy. The humanistic approach, as it emerged in the 1970s especially, has influenced many NGOs, social movements and educationists and is also very much present today. It is then possible to redefine lifelong learning in more progressive terms and as what will be an antagonist understanding in the OECD. However, there is today strong evidence that the economic function of lifelong learning is dominant on the different policy levels, and has also become an intrinsic value for societies, desired for its own sake and not in order to achieve something else (Biesta 2008). In the 1990’s, there was a development towards a greater emphasis on the human capital rationale on the agenda, both on an international, regional and national level. The emphasis on creating a flexible and adaptable workforce was strong. In a post-welfare society, where the nation state is challenged in terms of guaranteeing security for its citizens, a concept like LLL effectively also constitutes the privatization of educational responsibility (Olssen, Codd and O’Neill 2004). Citizens are viewed as consumers and responsible for their own (re)training.

Adapted to neo-liberal agendas, it can be suggested that LLL “represents a late capitalist solution to ‘investing in people’ – in their human, cultural and social capital – as the key to future employment, economic growth, mobility and cohesion” (Thompson 2000:134). Globalizing tendencies appear to promote a degree of convergence around different policy agendas, and with regards to this study, the emphasis on knowledge as the key to economic

well-being and the need to restructure education systems may be founded in the dual and shared focus on the importance of KBE and hence also lifelong learning. The globalization discourse appears to have become a frequently used justification for the adoption of lifelong learning policies, a development that further seems to be evident within the OECD.

4.6.1 A floating signifier?

There is reason to argue that the debate and the direct projects related to lifelong learning are mainly discursive. It is improbable to find concrete projects, although a greater focus on higher education, adult education and distance education would serve as examples inspired by the idea of lifelong learning. LLL as an idea has been disseminated widely, not least within other IOs as well. The main activities concerning lifelong learning are thus discursive (Jakobi 2007), and I would argue that it works as a so-called floating signifier (Laclau and Mouffe 2002). As seen above, there will be different opinions and understandings of the phenomenon, and different actors, for example the OECD and UNESCO will both try to give different meaning to the term. An element that to this extent is open to becoming defined with different content can be described as a floating signifier, a term used for elements that different discourses want to define (Laclau 1990). The discourse around globalization and the knowledge-based economy is attempting to define the meaning of lifelong learning towards that of the human capital rationale, and it also appear to have achieved hegemony for this idea. At the same time, floating signifiers as well as nodal points, run the risk of being called *empty* or imaginary, indicating that they do not really have any content. This definition is also the formulation of a problem. Laclau and Mouffe (2002) highlight how such empty expressions are especially important in politics. An expression is not related to any content, but it is still continuously becoming a part of a meaning system (Laclau and Mouffe 2002).

Other empty and imaginary expressions also often figure together with lifelong learning, such as globalization. Both globalization and lifelong learning are terms that are 'open' and may be filled with different content. Laclau's description of myths and the social imagination can be helpful, as lifelong learning has in particular been highlighted by politicians, the media as well as academics as crucial to the current globalized society. Also, it is difficult to be against a major focus on education, knowledge and lifelong learning, thus,

such ideas have the potential of gaining great political importance. They are powerful ideas that are used extensively, and seem to form a hegemonic discourse within the OECD.

4.7 Example of a social antagonist

Social conditions are always understood as political constructions that involve antagonisms. Within discourse theory, antagonists are relations where the parties do not accept each other's identity or interpretation (Laclau and Mouffe 2002). Antagonists imply that social systems, because they are political constructions, will always be vulnerable to the elements that are excluded in the political processes of meaning making.

The main aim of constructing dominant understandings is to dismiss other understandings and make them politically powerless. In this process, it is often necessary to collect and use understandings from discourses that are no longer central, and such understandings are often a precondition for legitimacy. Dominant understandings can thus be deconstructed when competing discourses illustrate how elements could have been emphasized and put together differently (Laclau and Mouffe 2005:74). Deconstruction is a process that shows how the discourse is made up of different parts and must be understood as the dissolution of a seemingly stable discourse. Through deconstruction it can open up other meanings where the process of creating meaning has previously given the impression of being objective and already defined. What is left out? What is highlighted? This makes it interesting to look closer at the term lifelong learning. What are the dominant understandings? What can be competing understandings? Thus, through examining the element of lifelong learning, we can also consider alternative meanings and understandings to the term, and determine how understandings of the term consequently have a strong influence on the broader discourse of globalization. We can say that the discursive disagreements around lifelong learning are influenced by antagonists. In this sense, the antagonists are an expression for challenges related to questions about what terms like lifelong learning communicate. Lastly, the antagonist can identify the actual complexity around terms that appear seemingly unambiguous and easy to support.

4.7.1 Lifelong learning on the neo-liberal agenda

'Lifelong learning' is an important contemporary theme, highly promoted through national and international policies as a solution to particular economic and social challenges needing to be overcome. It is highlighted particularly through international organizations, and in this sense, to a great extent used as a means to promote change within socio-political systems of governance, institutions of governance, institutions for education and training and lastly, in our very understandings as citizens within society (Nicoll and Fejes 2006). The relatively massive emphasis on knowledge as the key to economic well-being and the need to restructure education systems are thus to be found in a shared dual focus; on the importance of the knowledge economy and lifelong learning (Dale and Robertson 2007). LLL are often promulgated within national and international policies as a truth, and as a required response to an increasing pace of change, within the economic and social pressures of globalization and related uncertainty over the future. The policies highlight the notion of a knowledge society; if economies are to remain competitive and developing, then lifelong learning as a capacity and practice is necessary for survival in contemporary societies. There is a sense that LLL is being promoted as the solution within the policy rationality of capitalism, where those who do not conform will be left out.

Du Gay (1996) argues that a so-called ethos of enterprise (Edwards 2006) is crucial to the development of discourses of flexibility among nations, organizations and individuals in support of economic competitiveness. This will again give particular meaning to practices that exercise that flexibility, for example in the way that the ethos of enterprise also constructs responsibility, empowerment and success. The ethos of enterprise is thus both prescriptive and powerful; "the new citizen is required to engage in a ceaseless work of training and retraining, skilling and re-skilling, enhancement of credentials and preparation for a life of ceaseless job seeking: life is to become a continuous economic capitalization of the self" (Rose 1999:161). In this sense, lifelong learning also becomes positioned as a kind of moral obligation.

In a knowledge society, capitalization of learning can thus be said to be at stake as learning appears as a force to produce added value. Being part of society is no longer about being socialized and developing a social, normalized relation to the self, instead it is an ongoing task of managing one's learning process in order to produce human capital and in order to be

able to utilize social capital. Rather than the social citizen, the entrepreneurial citizen are promoted and stimulated in globalization discourse. This entrepreneurial citizen can also be seen in the elements that are prominent in “Trends shaping education”. The main characteristic of this governmental rationality can be described as a kind of economization of social life (Simons and Masschelein 2008). One is asked to invest in human capital, to learn or add value to the self and to find ways of productive inclusion. In this sense, lifelong learning is a market discourse that orientates education to an enterprise society where the learner becomes an entrepreneur of themselves.

4.7.2 An alternative understanding

Are there, however, other ways of understanding lifelong learning? The antagonist would be an emphasis on upon a socially cohesive society with active citizens when developing knowledge societies. Despite the fact that contemporary culture can be described by uncertainty, flexibility, information technology, risk, individuality etc. and thus driving the flourishing of LLL policies, it is also possible to understand the concept as presenting a much more holistic, democratic and maybe also utopian view of society. Must educational technologies such as LLL inevitably serve the labor market? Can a model of learning that is not the servant of neoliberal reason be developed? What ends should learning serve? John Dewey developed a holistic view of education and is by many seen as the founding father of LLL as it emerged in the 1970s. According to Dewey, a continuity of learning is essential throughout life to sustain democracy, community and citizenship. The development of the concept within UNESCO in the 1970s can be viewed from this perspective. In Dewey’s pragmatism (1916) the individual participates and contributes to the collective good of society and in the process constitute their own development. In this model, the learning society is a global society of engagement, where the learner is engaged in a process of action for change as a part of a dialogic encounter rather than as a consequence of individual choice (Olssen 2008). The most important distinctions from liberal conceptions of education would be first, a critique of individualism, second, a positive conception of the role of the state and third, a recognition of the social nature of the self.

An important element on the neoliberal agenda is privatization. From Dewey’s view, for example choice proposals within education would be seen to constrain interaction amongst different groups and thus also decrease the number of interests that students consciously

share. This also demands educational systems and institutions that are public and serves other as well as higher interests than that of the global market. It is through education that democracy gives rise to community, Dewey argues. This concept of democracy has important implications for educational and knowledge policies, as it is the role of educational institutions “to influence directly the formation and growth of attitudes and dispositions, emotional, intellectual and moral” (Dewey 1987:222). An increasingly strong human capital rationale within education is threatening this role. Education is necessary for raising awareness, for promoting critical thinking and instead, for existing as a counter culture of a globalized and market-orientated contemporary society. Rather than a critically thinking and morally responsible citizen, the emphasis in our contemporary society, and as exemplified in LLL policies, seems rather to be on an adaptable and flexible subject who will pursue his or her own goals and interests rather than necessarily that of the greater community.

Such understandings do however appear to be alternative understandings in globalization discourse and thus also within the work of the OECD in the field of education. Lifelong learning is often described as a truth and further, it is not only tied to the practices of schooling, but can be seen as inscribing itself within the learning and knowledge society as a whole. Even if the discourse also emphasizes social cohesion and equity, as in the text *Trends shaping education*, the dominant understandings seem to be concentrated around globalization, the market economy and the learning society as well as where the neo-liberal paradigm appear to be hegemonic. As shown in this chapter, lifelong learning does however seem to have the potential of offering and serving greater ends such as social cohesion and democracy, but not only as related to the understandings currently prevailing within the neo-liberal political agenda.

What about the non-member states? Is the dominant discourses also influential outside OECD member countries, and how does this happen? What may be consequences? The last section of this chapter will make an attempt to briefly address these questions.

4.8 “Global Forum on Education”

OECD states that global reach has been an integral part of the OECD mission since its inception, and the Convention states that member states should contribute to economic expansion in both member and non-member countries (www.oecd.org). Even though the

OECD is working on expansion, only a small number of new members can enter the fold at the same time. There are a series of examinations to assess a state's ability to meet OECD standards in all policy areas (www.oecd.org).

Networks within education in both member and non-member economies have been established through different programs and activities since 1991. The website states that:

Education plays a key role in achieving goals of sustainable economic development (...) Most non-members have embarked on reforms to meet the education for all (EFA) challenge and equity of access to lifelong learning. Several non-member economies have turned to the OECD for policy reviews and recommendations. (www.oecd.org)

In addition to the 30 member countries, 25 non-member countries are involved in different committees and working groups within the OECD. The demands on policy reviews and advice led to the creation of the OECD Global Forum on Education in 2005. This aims to “strengthen and expand OECD networks of education officials and experts to include a wider range of non-member countries”, and it contributes to identifying prominent developments, problems and issues in the adaption of education systems to the needs of changing economies and societies; relate the moves to wider trends such as democratization, technological changes, demographic factors, the progress of science, the globalization process etc. and lastly, to develop an agenda of challenges and activities on collaborative work between nation states (www.oecd.org).

As most member countries in the OECD are western industrialized countries, many non-member countries are developing countries. When working with non-member countries in these developing countries, the organization often take a regional approach. In African countries for example, the OECD works within the framework of NEPAD (New Partnership for Africa's Development). What are the implications in terms of developing countries adapting to more neo-liberal policies in the field of education? How does the dissemination of ideas work with regards to different contexts? In particular, the floating signifiers of a knowledge-based economy and lifelong learning are regarded as powerful terms across national borders.

4.8.1 A knowledge gap?

There has been enormous global development within the area of education in the last decades. The literate part of the world population has increased from 48 % in 1970 to 82 % in 2004 (Le Monde 2007), a development that is largely a result of improvements within education systems. At the same time, because of demographic growth, one could also argue that the number of illiterates has actually been through an increase of 24 % from 1950 to 2000. 64 % of these are women. The difference between the North and the South has thus never been greater, and 98.4 % of the world's illiterates live in developing countries (Le Monde 2007). However, there are often great differences within these developing countries between urban and rural areas, between different regions and between ethnic and social groups. It is a central question to ask if new policies such as lifelong learning and education in the knowledge economy are simply a luxury the OECD member states can afford, or if the ideas and norms represent lessons to be learned for developed countries as well. This makes it important to ask if the framework of the knowledge-based economy and lifelong learning within the OECD is relevant to developed countries.

The text *Trends shaping Education* applies a global perspective. It does not only refer to member countries or developed countries, but addresses issues such as global challenges (poverty, migration, climate change), global educational patterns and inequality. It is highly emphasized throughout the document how knowledge and better skills will reduce inequality, within as well as between countries. Piper (2007) argues however that globalization processes have not led to increased educational equity between countries in the region nor within these countries, and that this has, on the contrary, had a deleterious effect on the educational development in Sub-Saharan Africa. He outlines three main, amongst the many and varied reasons, for the failure; the history of misapplied and poorly designed programs implemented by international organizations, the neocolonialist policies promulgated by globalization and its advocates and lastly, the gradual decline of the importance placed on indigenous and local knowledge (Piper 2007).

These are all aspects of possible consequence in the OECD work in the field of education. An emergent question is therefore whether the western influence is now even more prominent with the advent of globalization processes and the discourse of a knowledge economy? With globalization, policy lending and borrowing is increasing. It is to be noted

that this is a practice resulting from international actors importing so-called best practices (Burde 2004), of which the OECD uses peer reviews, educational indicators and comparative assessment studies. This is however not imposed, but it is rather the case that member countries willingly participate in these activities.

One example of educational borrowing that has significantly shaped a new curriculum is South Africa, where the education system has undergone dramatic processes in the last decade, from content-based to outcome-based education (OBE) (Spren 2004). The shift towards an outcome-based education policy is a world-wide phenomenon, and must be seen as a part of neo-liberalism, New Public Management and the discourse of the knowledge economy, where the trends of service delivery (quality) and decentralization are especially important. Allais (2007) describes how this framework is also borrowed from other sectors and thus has little relevance to education. She also emphasizes how this policy approach has the potential to increase educational inequalities, particularly in poor countries. In South Africa, problems with the framework as a basis for education reform became rapidly apparent, and implementation has also faced serious challenges (Allais 2007). Some of these challenges must be related to standardization and the lack of adaptation to the specific cultural and historical context. International institutions like the OECD have particularly advocated the latter arguments and how competency - and an outcome-based framework are preferable in national education policies.

Fairclough (2005) highlights how an economic discourse produces general expressions for development that in most cases ignore contextual differences. A consequence of such a cultural technological development is normalization, homogenization and standardization. The strong focus on increasing and stimulating the transmission of the skills that are needed in a knowledge society and in a flexible workforce, undermines critical perspective; “in a critical view of education, knowledge and skills are indeed taught and learnt, but they are also questioned – a central concern is what counts as knowledge or skill (and therefore what does not) for whom, why and with what consequences” (Fairclough 2005:8-9).

A central question is the difference between richer countries and poorer countries when it comes to the influence of IOs and how their work is interconnected with national policy aims. Developing countries make use of and want to participate in OECD activities and programs, and with the “Global Forum on Education”, non-member states are included in information sharing through both specific activities (such as peer reviewing) as well as seminars. The

forum and the work towards non-member OECD countries thus also serve as a good example of how discourses and ideas are disseminated in a larger global arena.

4.9 Meaning construction

The analysis of the document “Trends Shaping Education”, the global forum on education and also examples from other publications has shown that hegemonic globalization discourse emphasizing HCT and the knowledge economy can be described as a nodal discourse within the OECD and its work within the field of education. We can also say that the globalization discourse has turned the above mentioned elements into moments and therefore communicate signs of social conditions that have been established in the discourse. It appears to be hegemonic. Further, the understanding of globalization must be described as relatively objectivistic, in the sense that globalization is taking place and it has certain effects. Such an objectivist position is similar to a position that would be taken by realists in IR. Keohane (2006) describes how constructivism focus on the beliefs of agents prior to strategies that are employed, and highlights how a constructivist approach plays an important role because it “reminds researchers to investigate not just what strategies are devised to attain interests but how preferences are formed and how identities are shaped” (Goldstein and Keohane 1993:5-6). Similar views⁷ are also pointed out by Katzenstein et al (1999); “constructivism analyzes discourses and practices that continuously recreate what rationalists refer to as common knowledge” (p.44).

A constructivist view would therefore highlight globalization more as an idea that is also used to strengthen certain arguments. The analysis has shown that beliefs related to the KBE and the importance of human capital seem to be dominant and hegemonic in OECD work in the field of education, and that they fit well within the broader discourse of the market economy and neoliberalism. At the same time, the analysis has shown that while certain understandings are hegemonic, others are not emphasized and become to a greater extent alternative understandings and a part of the discursive field. Bacchi (1999) argues that it is important in policy research not only to discuss policies in a materialist sense and whether or not the implementation was successful, but to rather look into how policy proposals contains

⁷ This also points to constructivism being on another level of abstraction than more rationalist theories.

the formulation of a problem; a problem representation. Following the more commonsense notion of how we think about something will affect what we believe must be done, an analytical tool such as discourse analysis may be fruitful in the focus on interpretations and representations. In the analysis of “Trends Shaping Education”, concepts such as globalization, lifelong learning, a knowledge society and human capital are employed to frame the formulation of a problem; the challenge of knowledge as the main source of future growth and prosperity. The problem then also concerns the lack of quality and effectiveness in national education systems. This analysis has shown that these items can be described to make the political agenda in OECD and thus also OECD countries (as well as non-member countries). Through discourse analysis, there is the possibility to open a space (Bacchi 1999) for reflecting upon both hegemonic as well as alternative understandings.

The dominant discourse thus communicates the formulation of challenges, and these problems are constructed as being global. In what ways are states adjusting to these constructions? The discourse may also work as legitimizing for new policy directions on the level of the nation states. There is reason to raise a question if there is some kind of socialization of the member countries, and also the non-member countries, into the globalization discourse and a perception of what is communicated as (objective) trends. Also, the hegemonic discourses and present trends within the OECD may legitimize what may be done and also what the solution on the challenges should be. In this sense, a constructivist frame of interpretation can open up a deeper understanding of a social field and show how ideas, values and norms are disseminated. These ideas, norms and values consequently seem to have an impact on national educational policies. The following chapter will therefore examine and discuss in more depth the governance dimension of OECD as an IO in the policy field of education, as well as discuss how the constructivist approach is appropriate as a theoretical framework in this study.

5. Educational governance

International organizations are believed to influence national policy making, but to what extent it does this varies and scholars disagree. There is however no doubt that an international organization such as the OECD is an important actor in terms of governance. The main research question to be addressed is how does the dissemination of ideas have an impact on education policy making? What tools does the OECD use? How do nation states respond? In what way do nation states push the agendas in international organizations? This mainly theoretical discussion is based on the findings in the previous chapter, but particularly addresses the question of how the dissemination of ideas has an impact on education policy making. The constructivist interpretation logic is prominent, focusing on the role that the dissemination of ideas such as the knowledge economy, lifelong learning etc. plays when viewed from a governance perspective⁸. The chapter will also look into how what we can describe as rationalist interpretation logics would address the issue of IO governance in the field of education.

5.1 The dissemination of ideas

OECD publishes land reports to every member country, with specific emphasis on recommendations for economic policies. Kildal and Kuhnle (2007) describes how such reports are often based on close communication between national governments and the experts of the OECD, and that it may seem that ideas originate nationally, transported to Paris and then returned in a greater package with a more impregnable print. National governments interact continuously with the OECD through seminars, conferences and meetings. Often, reports and publications are followed by national conferences where the findings are presented and discussed.

From this perspective, the OECD has a certain status as an independent think tank. A huge number of experts gather, document and analyze economic policies in particular, but social policies and education policies are also high up on the agenda. As the OECD has no

⁸ Thus, more concrete OECD programmes and activities will be examined.

economic or juridical possibilities for using sanctions, the moral pressure is exclusively based on the organizations status as an independent, science based knowledge producer. Kildal and Kuhnle (2007) argue that the OECD thus becomes a powerful and important participant in what can be described as the so-called game of ideas for political, economic and social development. The main aim is closely related to promoting an agenda for political debate and political reforms that appear to be scientific and neutral. As also shown in the analysis, the different political possibilities are undermined. There is reason to argue that the ideological ground position within the OECD has been somewhat unchanged in the last 30 years (Kildal and Kuhnle 2007), where market and individual welfare responsibility rather than state and collective responsibility are more key aspects. From the end of the 1970s, the OECD has recommended countries to cut public expenditures, make the labor market more flexible, strengthen individuals' responsibility for their own welfare and reduce the extent of welfare services⁹. Such ideas must be described as being mainly neo-liberal, as also shown in the previous chapter.

5.1.1 The idea game

The analysis has shown how certain ideas are prominent in OECD discourse. In relation to this, it is reasonable to ask to what extent these ideas influence member countries. The process when this happen, can be described as policy transfer and defined as “the process by which the policies and/or practices of one political system are fed into and utilized in the policy-making arena of another political system” (Dolowitz 2003:101). Such transmission of ideas can also be conceptualized as diffusion and convergence, and thus also focuses on the outcome of the policy transfer process. Diffusion is hence concerned with the conditions of policy transfer and with trying to identify the patterns by which certain policies spread (Bennett 1991). Looking at Norway, Kildal and Kuhnle (2007) argue that there is both consistency and non-consistency between OECD recommendations and national policy making. In most cases, there seems to be a relatively close connection between OECD recommendations and reform tendencies in national policy making. This influence can however also be as a result of indirect influence over a longer period of time, the influence

⁹ There is also reason to believe that USA has a substantial influence on the ideological and analytical agenda, as they pay about 25 % of OECD budget (Kildal and Kuhnle 2007).

can be mutual or it can even be a coincidence. Still, there is strong evidence to show that the OECD must be presumed as giving important input into the development of an economic knowledge regime across national governments that strengthens a common understanding of problems, a common foundation of values and a common view on political solutions. However, these ideas cannot always be found in national policy making. Norway has, for example, resisted many policy suggestions from OECD in the area of welfare reform and in maintaining the strong role of the state. National policy making stands above recommendations from the OECD, but the organization seem to be an important actor in the idea game. A hypothesis may be that the OECD over time prepares ground for policy making that can later be accepted on national level.

Much focus in IR literature deals with the impact of globalization on welfare states, and the emphasis is first and foremost on economic and technological forces and less on ideational forces (Kildal 2003). Ideational forces played out by such bodies as the OECD, the World Bank, ILO etc. has thus gained less attention in the design of different policy reforms, and the objectivist position (Fairclough 2006) on globalization has been dominating in research on international organizations. The OECD plays a special role as it does not have any legal, regulatory or financial pressure to put into effect, but rather relies on the exertion of moral pressure. The organization possesses no means, but advises directly to national agendas. Thus, the primary tool can be described as naming and shaming (Kildal 2003). This form of governance can be described as soft regulation, as the organization has no other option than to play the so-called 'idea game' (Marcusson 2002). Since the OECD only performs multilateral surveillance based on moral pressure, it actually must be an efficient player of this game of ideas (Kildal 2003).

There is reason to believe that if high levels of consistency and effectiveness can be identified, the OECD appears to be a powerful IO of policy transfer (Armingeon and Beyeler 2003). Marcusson (2003) identifies different roles in this game of ideas. Consultation is one such function, where the overall purpose is to develop common worldviews, establishing a basis for shared definitions of problems and solutions, especially focusing on economic policy making. 'The idea game' thus concerns the formulation and transfer of ideas that are expected to produce specific kinds of state behavior. Kildal (2003) further distinguishes two important roles that the OECD is playing in this game; as an ideational artist and as an ideational arbitrator or mediator. The role as an ideational artist involves formulation, testing

and diffusion of new policy ideas; “in playing this role, the OECD can be depicted as an enormous think-tank, willing to help its member states with empirically-based advice” (Kildal 2003:9). The OECD figures in this role as a forum for neutral consultation, and the employees have a stronger loyalty to the IO than their home countries. Being such a politically and financially independent body, the OECD can distance themselves from national controversies and rather keep a full focus on empirical and scientific concerns. Thus, it becomes a so-called epistemic community (Haas 1992).

The role as an ideational arbitrator can be described to serve as a meeting place for various ideas. Kildal (2003) argues that in order to be an efficient player in the idea game, the OECD produces meeting places for national servants. About 40,000 civil servants take part in different meetings in the OECD headquarters in Paris during a year, which functions as a kind of talking shop and hence provides the participants with mutual education. These are not arenas for decision making and formal agreements, but servants return to their home countries with ideas that may be brought to national legislation and regulations. Thus, the moral pressure is influential; the OECD has established what it considers to be a rightful national discourse and a politically correct form of behavior (Marcussen 2003).

Kildal (2003) outlines two additional roles that OECD plays, that has developed more recently and dominates its functions; that of ideational agents and of an ideational agency. When playing the role of an ideational agent, the OECD adopts ideas from the most prosperous member states, develops them further and transfers them to less central states. In this way, it plays a game defined by the main financing countries, of which the USA, Japan and Germany are the greatest contributors and account for around 60 % of the overall budget. There is thus an asymmetry between older and richer members, and the newer and poorer member states. Is then the OECD a meeting place for equals? Related to the dominant globalization discourse and the relation between globalization processes and national sovereignty, the question of how to define globalization becomes important. Globalization is defined in different ways, and it is dependent on other terms and concepts to create meaning. Kildal (2003) argues that the OECD developed and spread a certain understanding, the so-called structural determinist globalization thesis, where globalization is constructed as a threat to national decision-making and that the situation demands reforms of markets and of welfare systems. Such neoliberal economic reforms would make states work hard not to fall behind in development. From this point of view, powerful states may be said to have

exploited or (ab)used (Martens 2005) IOs in order to disseminate and diffuse certain ideas. Such a picture would undermine the OECD as an independent science-based think-tank (Kildal 2003), and it is argued that the interconnectedness and two-way influence should be highlighted. The role as an ideational agency implies that OECD are constantly engaged in national political debates, and its credibility will be gained by assisting member states to concretize and implement somewhat diffuse ideas, of which the KBE and LLL can serve as examples. Strange (1998) argues that this is an important reason why IOs rarely die. Whenever a new crisis occurs, the organization manages to invent itself in a new form and becomes well fitted to the context. If the IO is delivering the discourses and goods needed in member countries, they serve an important function for the national states.

A research group studying OECD problem definitions, criticisms and recommendations to 14 European welfare states over a 30 year period, concluded that the consistency of the OECD recommendations is high, but that their effectiveness on the other hand is relatively low. These results then show that OECD does not seem to be a powerful international agent with regards to policy transfer. The consistency in the recommendations is however undeniable, argues Armingeon and Beyeler (2003), and it is the direct consequences that are hard to identify. Reasons for this could be that other international organizations pursue similar ideas, domestic reasons for reform, ongoing policy changes merging with OECD recommendations. In the case of Norway for example, cooperation with the OECD has been regarded as a high priority, and is an important reference point and source of support and advice. At the same time, OECD advice is also often disregarded or given half-hearted attention (Kildal and Kuhnle 2003). Cases of discordance mainly appear in policy fields where the advice challenges the most important domestic political institutions or they are a challenge with regards to the nation's political culture (Armingeon and Beyeler 2003). For example, proposals that may result in growing inequality of opportunity would most likely be opposed in Scandinavian countries. Within education policy, privatization of schools would be an example of one such proposal. Moreover, there is most concordance in areas with small differences between OECD and national traditions in values and ideas (Börzel and Risse 2000). The study concludes that the OECD does not produce plans that are easily introduced to national policy making, but that their influence is more contingent (Kildal 2003). Policy recommendations are afforded influence if they resonate well with national policies. The OECD should not be regarded "a neo-liberal threat to the welfare state", but at

the same time, the IO is not without relevance (Kildal 2003:15). The dissemination of ideas can thus be viewed as very important and such ideas seem to easily influence political and academic debates, the media etc., though in a more indirect way. Thus, it is important to analyze how these ideas are constructed, as also shown in chapter four.

5.1.2 An example on OECD influence

One way of assessing the efficiency of OECD proposals and the dissemination and spread of ideas, is to map the explicit references to the OECD in national political processes (Kildal 2003). The hypothesis will be that if the OECD is an important source, it will be referred to in national debates. Another question is if the organization is mainly referred to as a trustworthy source, or an authority that actually influences policy making (Kildal 2003). A brief word search in the recent White Papers in Norway shows that OECD is mentioned several times, and that their publications are used extensively as references. In White Paper 30, *A Culture for learning*, the OECD is mentioned 28 times. In this paper, there are especially many references to OECD work in the field of competencies, definitions that have influenced the current curriculum in Norway. In White Paper no. 16, *Early Invention for Lifelong Learning*, the OECD is referred to 79 times. In this White Paper, many OECD sources have been used. In White Paper no. 31, *Quality in school*, the OECD is referred to 49 times, along with many OECD sources being in use. Lastly, in White Paper no. 44, concerning aspects of lifelong learning, the OECD is mentioned 40 times. These findings imply that the OECD is especially relevant and important with regards to providing information, concepts and definitions to national policy makers. The role of ideas seems highly relevant, as also words such as knowledge society, globalization and lifelong learning are extensively used in all the above-mentioned documents. The role of references to the OECD will in this way work as legitimizing reform or new policies.

Laclau and Mouffe (2002) emphasize how the only possibility for a term constantly in use if it does not have any specific content, is if something is achieved by using it. When terms such as knowledge society and lifelong learning are so central as phrases and ideas in educational policy making, they also function in order to legitimize. When the relationships between discursive expressions such as knowledge society, globalization, new technologies, need for competence and lifelong learning are highlighted, this also influences our construction of meaning. It is easy to be for and difficult to be against such ideas. This is a

part of what can be described as legitimization processes that lead to hegemony for certain ideas. McEneaney and Meyer (2002) highlight the importance of examining the obvious, as this would tell us much about what is desired politically. In particular, imaginary terms are very powerful, and consequently, they will influence what tools and activities are selected to reach the greater goals and ideas of the knowledge economy and of lifelong learning.

Important activities in the OECD are important sources of the dissemination of these ideas, of which international comparative assessments of student outcomes, peer review and comparative reviews are example activities. At the same time, legitimization is often related to a domestic need, for example if a state wants to get support for reforms from the outside. The OECD, as a reliable and trustworthy source, is then helpful. A state could also initiate OECD studies.

5.2 Educational indicators

The OECD has put much effort into its program on educational indicators, and they are today an important part of their work in the policy field, perhaps even the most respected within the field of education. Statistical information on these indicators is also one of the oldest projects in the policy field. In the 1960s, the interest in using statistical information for educational planning grew and the OECD began their work on factors that are significant for effective educational investment planning and conceptualizing indicators for comparison (Papadopoulos 1994). This should also be seen in relation to the emphasis on human capital theory that grew in the 1960s. In the 1980s, the INES-project (International Indicators of Educational Systems) was initiated and annual publications were published. Since the early 1990s, the OECD has published extensively on these indicators, and they have thus become focal points for politicians, the media and the general public. This has been advanced in particular through the PISA (Programme of International Student Assessment Programme) programme, using educational indicators in a comparative way.

The publication *Education at a glance* has developed to become an important source for education statistics and data, and is today regarded as the most significant publication in the field of educational statistics (Martens and Balzer 2004). The publication includes 36 indicators and provides data from all member countries. In addition, the publication is also addressed to non-member countries. For example South Africa has, as a non-member, been

reviewed several times by the OECD in many policy fields, amongst them education. These publications often receive much attention. When the last *Education of a glance* was recently published in September 2009, it received much attention on the website of the Norwegian Government, and was frequently referred to in the media, within the political arena (documents and speeches especially) and also in academic institutions.

5.2.1 Assessment studies

Educational access with quality is very much a part of the dominant discourse, and the most tangible form of quality is often comprehended as testing of performance. International comparisons have become a regular practice throughout the world, of which the OECDs Programme for International Student Assessment (PISA) is the largest international study, and is regarded as scientifically grounded. The Programme started in 2000, and is carried out every third year. The results are published the following year. These comparisons also bring together developed and developing countries, for example as in the tests carried out by OECD. Results, and first and foremost the bad results, are often used to criticize the existing education policy and also used as a legitimization of education reform. Steiner-Khamsi (2004:207) characterizes these processes as “the politics of league tables”. The impact does however vary substantially across the participating countries, and Martens and Niemann (2009) discuss how such international rankings have an impact on nation states, and further, why there are such differences in influence. They base this discussion on the attention that media has given the PISA results. For example, Germany had bad results and it received much attention in the media. This again led to education reforms in Germany. Martens and Niemann (2009) find in their studies that in other countries with weak PISA results, such as the USA and Norway, there were little media coverage and discussion. Martens and Niemann (2009) argue that Norway had extremely little attention drawn to their weak results, while the majority of scholars in Norway argue that the result received a great deal of attention and was an important part of legitimizing new education reform in Norway. While Martens and Niemann (2009) argue that PISA did not initiate public debate in Norway, Norwegian scholars would argue that it did and to a great extent. However, the most important aspect of this is how the PISA-results, both in Germany and Norway, in many ways challenge the self-perception of a well-educated society. The PISA-results are then transformed into “an activation of encompassing education reform dynamics by revealing a gap between self-perception and evidence as well as by generating a link to other crucial

issue of state performance” (Martens and Niemann 2009:3). The PISA results would then also influence an extensive public and academic discourse on different educational issues in these countries, particularly if the results communicate shortcomings in the system.

Another aspect with the influence of OECD programs such as PISA when it leads to extensive media coverage and education reform is the emphasis on education as closely related to the economic performance prosperity of the nation state. In this perspective, bad performance in education is discursively linked to anticipated future advantages in other areas. Many would argue that education is an end in itself with its own greater aims, while others would not frame education as an end in itself, but also as the antagonist discourse illustrated. Weymann and Martens (2005) describe how education is usually associated with certain higher or super ordinate state purposes such as micro- and macroeconomic prosperity, technological and cultural advancement. Thus, there is also reason to argue that the pressure for improving national education performance can only emerge from poor results if the topic education is linked to another pressing national issue and thus serves a more general state purpose (Martens and Niemann 2009). Bad results in PISA would equate with a risk of economic prosperity in particular and also be linked to anticipated future disadvantages.

Such perceptions must be viewed against the backdrop of the trends and discourses described and discussed in the previous chapter. When OECD activities and PISA gain so much attention, the dominant understandings of education within the OECD will spread to the countries participating in OECD assessment studies. As shown, the discourse on globalization with an emphasis on economic prosperity is hegemonic, and elements in this discourse will thus disseminate through programs like PISA. There is reason to believe that the economic ends of education will be strengthened with the influence of the OECD. Also, with the increasing importance of IOs and the influence on national policy making, a trend that education policies throughout the world are moving towards a greater extent of standardization develops. Ideas and understandings are shared, both through imaginary expressions and actual activities. Following this, a greater emphasis on policy borrowing is often created, where states adopt policy ideas from other countries and share best practices. This process of policy borrowing from the work of other countries has been evident in Norwegian policy making, especially with regards to a new curriculum and school reform. In South Africa, OBE is an example of policy borrowing (Steiner-Khamsi 2004).

5.2.2 Governance by comparison

Martens and Niemann (2009) describe processes related to the testing of student outcomes as governance by comparison. Comparative depictions have become prominent in many policy areas since the 1990s and comparative illustrations¹⁰ in the form of rankings and ratings are increasingly being used. Such comparisons may influence states, market actors and individuals.

Comparisons are popular techniques because they provide succinct information in a short period of time and in an easily digestible way: without being an expert in the specific field, anybody can understand that being ranked # 5 is different than # 77, or that a positive value in any rating differs from a negative. (Martens and Niemann 2009:6)

The effect of ratings is not new, but the application and continuous expansion to political institutions can be described as new. Ratings and rankings are used for states, for state performance in different policy fields and for state institutions (Martens and Niemann 2009). Questions following this would be why states allow themselves to be compared to others, and also why many nation states want to participate in such comparisons. As the OECD has no legal instruments, all participation is voluntarily. Also, non-member countries would approach the OECD to participate in their activities. As it lacks formal aspects, the governance dimension can be described as soft governance.

5.3 Soft governance

Soft governance refers to governance that is not regulated by formal instruments, but rather by ideas and information as tools for policy making and policy implementation. By disseminating ideas and activities through seminars, information sharing, reviews, assessments etc., the OECD have the capacity to form and guide national policy makers. No exception in the policy field of education. Drawing on institutionalism and thus also a constructivist approach, the question of how international organizations share their ideas, is however important. Martens and Balzer (2004) describe three dimensions of governance as exercised by international organizations, all of which can be described as forms of soft

¹⁰ Other examples would be the Failed States Index, University rankings etc.

governance; governance by co-ordination, governance by opinion formation and governance by instruments.

5.3.1 Governance by co-ordination

Governance by co-ordination refers to the ability of an IO to provide means to organize, manage and handle procedures that promote new initiatives in education policy making (Martens and Balzer 2004). Activities such as conferences and seminars, the infrastructure within the organization and the role, background and expertise of the staff are important aspects. By applying this kind of co-coordinative governance, IOs can give incentives, initiate projects and shape initiatives, and are thus also able to influence political processes by organizing and directing, often also speeding up programmes and processes in policy making (Martens and Balzer 2004). This was evident in Norway after unsatisfactory PISA results in 2000 and 2003, as new policies were implemented in a relatively short period of time, gaining support in all political parties. There is reason to believe that such broad approvals would not be possible, or at least more difficult to implement, without the OECD assessment studies and country reports. In recent years, Norway has become more willing to take part in OECD programmes, and its education policy has increasingly taken up ideas related more to human capital theory and neo-liberalism (e.g. Sjøberg 2007). In official documents and speeches by Norwegian officials, the OECD is extensively used as a reference, and thus seemingly regarded as a very important and reliable source of information. Haas (1992) also emphasizes the importance of individual staff members or groups of members through their position in terms of expertise and experience.

It is however not a one-way influence, and it was countries such as the US, France, Austria and Switzerland that began to put pressure on the OECD from the 1980s onwards to do more in the area of educational indicators and educational statistics - the US in particular (Martens and Balzer 2004). It was thus in the end of the 1980s that this work became organizationally institutionalized, and eventually led to the publication of the first *Education at a Glance* in 1991. Educational programmes are managed by the OECD headquarters, who gather information, develop indicators and organize their presentation. It is however a very small secretariat within the OECD working with the indicators, as most of the work is conducted by national representatives (Martens and Balzer 2004). On the other hand, they develop the schemes that are used and have the freedom to design and change the content of the

indicators. There are therefore reasons to argue that while the states took the lead in the past, the OECD today is a more active supporter of the indicator programme and that to a great extent it designs and shapes its content and design (Martens and Balzer 2004).

5.3.2 Governance by opinion formation

Governance by opinion formation refers to the capacity of an IO to initiate and influence national discourses on certain policy issues (Martens and Blazer 2004). It can be further described as thematic in terms of the manufacture of hegemonic discourses. Thus, the content of the discourses is important, a content that is spread through different kinds of material, such as facts and information that OECD generates through reports, books etc. (for example *Trends Shaping Education*), as well as models and concepts that are created. Consequently, the IO generates visions and values that shape policy making in member as well as non-member states. When through different forums the OECD raises certain ideas and activities, new ideas, concepts and models are analyzed and further developed (Cox and Jacobsen 1973). Such dissemination further fosters processes that lead to the origination of new constitutive norms or come to generate normative pressure. This is evident in Norwegian educational policy making, as the reports on Norwegian education policy cannot be left without implementing new initiatives. As this is the situation for many nation states, this kind of thematic reflection over educational issues cannot be overlooked, but rather has to be met with policy suggestions. The media will also play an important role in this issue, contributing to the social imagination of a certain problem. One such problem would be for example, bad results in PISA. Because the OECD is especially focused on concepts for assessments, there is reason to think that nation states would be likely to intensify the work in this area. An analysis of Norwegian policy making in recent years show that the focus on assessment at different levels has increased considerably on all levels. In particular, the focus on national assessment has increased, and Finnemore and Sikkink (1998) argue that international organizations produce standards of evaluation and mutual scrutiny on national levels, as a state's own policies in many ways are mirrored in those of others.

PISA is a highly important part and also the most advanced part of the work on educational indicators, and with the use of a sophisticated methodological approach, it is quite resistant to criticism and has attained a high level of validity. Martens and Balzer (2004) argue that because methodological considerations and political aims have been separated, PISA has

gained broad acknowledgement on both the political and scientific level. With PISA, over 300 scientists from the different member states participated in the formulation as well as the actual implementation of the tests. The influence thus appears to flow both ways. As Finnemore and Sikkink (1998) argue, OECD publications and projects seem to raise the consciousness around educational evaluation. The OECD is highly capable of exercising governance by opinion formation, and the dissemination of ideas seems again to be of great importance. The emphasis on KBE, lifelong learning etc. can be found in activities on the national level.

5.3.3 Governance by instruments

Lastly, Martens and Balzer (2004) outline the governance of instruments. This is a more direct and technical form and includes those regulations to which states would need to adhere due to their membership in the organization and the resources available (Majone 1996). It includes pushing and organizing the design of binding decisions and the translation of the outcome to policy proposals. Financial resources are also a part of this governance, but the OECD cannot influence initiatives by financial means. Rather, they are dependent on member states who want to conduct a programme, and it is the annual contributions from member countries that cover the programmes and the staff. As this form of governance encompasses legal acts and regulative norms to which the member states agree to comply (Reinalda and Verbeek 1998), it is to some small extent relevant to the OECD work in the field of education. It is a strong form of governance, as opposed to governance by opinion formation and governance by co-ordination, and the OECD has no real instruments at its disposal to exert governance upon its member states (Martens and Balzer 2004). Thus, soft governance approaches such as co-ordination, opinion-formation and comparison are likely to be most applicable to OECD governance in the policy field of education.

The discussion around the governance dimension of the OECD above has mainly taken place within the constructivist paradigm. But how would other theories of international relations explain the governance exercised by the OECD in the policy field of education? The brief outline of what can be viewed as two main forms of interpretative logic; constructivist interpretations and rationalist interpretations will show how the governance dimension of international organizations can be seen differently.

5.4 Constructivist interpretations

The constructivist paradigm was outlined in chapter two, and in this section, the research question will be examined through the lenses of (new) institutionalism, cultural political economy and actor-network theory. The theories can all be placed within a constructivist research frame.

5.4.1 Institutionalism

Looking at an interpretation within the institutionalist logic, involvement in the work of the OECD is a result of perceptions that are shared amongst states regarding the purpose of education policy. Such an interpretation would highlight for example the willingness to compare educational outcomes and results with other states, not as a result of a functional and more utilitarian calculations (Martens and Niemann 2009), but rather the diffusion of shared ideas or certain modes that influence the actors (Meyer and Ramirez 2000). Regarding involvement in the work of the OECD on educational indicators and in the PISA programme, the objective will be to establish normative criteria for appropriate behavior, and Finnemore (1993) highlights that an international organization such as the OECD is seen as an actor itself, capable of producing shared norms, values and standards. Globalization discourse for example is then understood to increasingly influence and shape the conceptions of the actors involved and to direct decision-making both on a national and transnational level. Rittberger and Zangl (2003) emphasize how this is especially effectual when the membership is homogenous, and as most member countries within the OECD are highly developed, norms and standards do receive a relatively high degree of communality. Working as an intergovernmental body with peer reviews and comparative assessments, there is reason to believe that there would be a relatively strong normative aspect within the OECD work in the policy field of education, and what is currently regarded as the right thing to do for member states is prominent. Less described in literature on this topic seems to be the interconnectedness between the OECD and non-member states that seem very eager to take part in OECD activities and programmes.

In the constructivist and institutionalist approach, the dissemination of ideas thus seems to play a very important role, as the hegemonic discourse would communicate what is presently regarded as important and valuable. This would be the most appropriate for states to follow.

From this perspective, the OECD seems to play a crucial role. This is emphasized by the use of scientific data and comparable statistics. However, as the discussion has shown, such rationalist instruments also have certain ideas, norms and values attached to them which are disseminated through OECD activities and programmes. Opinion formation and co-ordination are thus soft governance tools that within constructivist interpretation logic seem to describe OECD forms of influence on national policy making in a good way, which are also an important alternative interpretation to a more rationalist one.

5.4.2 Cultural political economy

Cultural political economy must also be placed within the constructivist theoretical approach, and Fairclough (2006) highlights how researching discourses in relation to globalization works well with the theoretical framework of cultural political economy (Jessop 2004). Political economy differs from the classical economy in viewing economic systems and economic change as politically conditioned and embedded, and that they are closely interconnected with political forms and systems (Polanyi 1944). The cultural political economy asserts that economic and political objects are socially constructed. Such objects could be economic systems, the state, forms of governance etc. Thus, it emphasizes that there is a subjective side to the construction of objects. When people are involved it also brings in culture, and forms of state would be closely interrelated with particular meanings, values, attitudes and identities.

A central question of the cultural political economy is about the variation, selection and retention of discourses (Fairclough 2006); how certain discourses are highlighted, how they are institutionalized and thus become effectual on real economical, political and social processes. The analysis has shown how the globalization discourse has turned elements such as the knowledge-based economy, human capital and lifelong learning into moments, hence communicating signs of social conditions that have been established in the discourse. In cultural political economy, it is also important to ask how discourses can shape actual processes, as a discourse is embedded in ways of being (social and personal identities) and ways of interacting communicatively. These are important theoretical contributions with regards to what may be the social consequences on other institutional levels.

5.4.3 Actor- network theory

Actor-network theory is regarded as constructivist theory, and it is Latour in particular (1987) who has developed the theory and what is described as the concept of the black box. Actor-network theory aims to explain how material and semiotic networks come together and act as a whole, also insisting on the agency of non-humans. Allies in actor-network theory can be humans (politicians, researchers etc.) or non-human (facts, theories, activities etc.), all constituting a network that upholds and ratifies its elements (Latour 1987). Resnik (2004) argues that international organizations should be seen as agents, and thus institutions with structures and resources, as well as cultural constructions, where norms and practices are interpreted by local actors. In this interpretative logic, IOs are seen as important agents that influence the policy field of education. Resnik (2004) describes the emphasis on human capital theory and the knowledge economy as the education-economic black box, and argue that the adoption of this black box is translated to the main objectives of the IO and also increases the institutional power in this policy field. She argues that there is a homology and compatibility between the characteristics of education-economic growth and the aims of the international organizations. First, the quantitative character of the black box allows for the shaping of so-called precise and persuasive policies, and second, it allows for the policies to be regarded as objective, unbiased and universal (Resnik 2004). The non-political and value-free aspects of such quantitative material strengthens the role of the OECD as a mediator that co-ordinates international cooperation. Precise data also makes it appealing for national policy makers, as this can lead to practical resolutions and facilitate decision-making on the national level. Calculability and such seemingly apolitical approaches are often welcomed in international organizations trying to coordinate world activities in a pluralist manner (Resnik 2004). Analysis has shown that there is reason to question whether OECD activities are apolitical, as they seem to lie quite clearly within a neoliberal economic paradigm, however apparently hegemonic. This network would also expand as non OECD member countries become involved in programmes and activities, and thus dominant ideas within the OECD will also spread. Within the OECD, both the power of human and non-human actors seems to have increased more recently. There are more researchers and experts, and they are involved in more advanced programmes and activities and also publish their results and analysis to a greater extent. In addition, the number of work groups and international conferences has grown, all leading to an increase in actors within the network and hence

strengthening the capacity of the OECD. The economic dimensions of education are strongly emphasized, and continue to expand with increasing activity. International organizations would consequently also grow and increase their resources and power.

5.5 Rationalist interpretations

A rationalist interpretation would typically argue that involvement in OECD activities and programmes would reduce transaction and transformation costs in liberal societies and in liberalized markets (Moravcsik 1993). The need for a more efficient and better quality education system is a result of new and higher demands in the labor market, and such challenges cannot be met by individual states (Martens and Niemann 2009). In this interpretation logic, a comparative study for example, would be an instrument for displaying different solutions to specific challenges that are identified. Only such objective data can reveal the so-called best practices and make these available for poorer performers. Nation states would approach an IO such as the OECD, wanting the organization to perform an evaluation of their education system, as it is regarded as suitable for developing and applying objective criteria needed for comparative assessment studies and evaluations. A rationalist interpretation would thus emphasize what is most effective, while a constructivist and institutionalist interpretation would highlight what is most appropriate. The analysis has shown that both member and non-member countries approach OECD to conduct reviews and take part in their activities. This is also related to the effect of ideas on politics. The constructivist paradigm here meets a challenge, when it is not evident that ideas have caused an evident change in the national system, but rather implicitly influenced the national system over a longer period of time.

5.5.1 Regime theory

Kallo (2006) examines OECD as an organization from the perspective of regime theory. Regime theory is a theory within the realist paradigm in international relations, arguing that international institutions or regimes affect the behavior of states. Regime theory highlights cooperation despite anarchy, and instances of cooperation are described as regimes. Krasner (1983) defines regimes as institutions possessing norms, rules, and procedures that can facilitate a range of expectations. Cooperation within the OECD in the policy field of education may then be described as a regime. Knowledge is regarded as the central tool of

the OECD's regime formation, as decision-makers in member-countries would demand high quality information and those who then can supply such information can exert considerable influence on policy making (Hasenclever et al 2002). The epistemic community does therefore not generate truth, but rather provide consensual knowledge, where the senders are different networks of professionals with highly recognized expertise and competence in a specific field, in this context the domain of education. From this perspective, we can say that one of the main effectual mechanisms of the OECD is dissemination, as the organization to a great extent works through agenda-setting. Agenda-setting can thus be understood as a strategy where the OECD demonstrates a probable direction of policy-making in its member, and also non-member, countries. Seen this way, the dissemination of ideas and agenda-setting also works as a form of governance, and can be related to a more constructivist interpretation and what Martens and Balzer (2004) describe as governance by opinion-formation. In this perspective, regime theory is not only placed within a rationalist logic, as a more sociological approach also highlights the importance of perceptions and environment.

5.5.2 Principal-agent theory

Within another rationalist interpretation logic and based on principal-agent theory, one of the main arguments is that states (principals) delegate to agents (IOs) to facilitate cooperation between states. Thus, there is reason to believe that there are important, domestically motivated reasons why states delegate to international organizations and the theoretical approach is concerned with the reasons for empowering the IO to act on behalf of the state (Bernhard in Martens 2005). Scholars working within this paradigm have found various underlying motives; international problems and multilateral problems. The first category addresses how the delegation helps to overcome collective action problems, it promotes shared values and it facilitates cooperation. The second category emphasizes how the delegation helps to restrain other states, increase transparency and reduce transaction costs (Cortell and Peterson 2002). Martens (2005) argues that there is an aspect that has not received enough attention within this principal-agent theory, and that is the delegation to IOs not only with respect to other states, solve collective action problems and lower multilateral bargaining costs, but rather that states use or abuse an international organization to solve internal problems. Seen this way, it is not international or multilateral problems that are the reason for sending the delegation to IOs, but the presence of domestic deficits and the need for solutions that form the motives for the national government to delegate to IOs. Martens

(2006) refer to Bernhard (2002), who emphasizes and acknowledges domestic sources of international delegation and how such contexts shape the willingness of a state to participate in the work of an IO. While this perspective views international delegations more as a necessity, Martens (2005) asks why states appeal to an IO voluntarily even if they have other options. Thus, she views international delegations as an alternative to domestic solutions.

From this viewpoint, delegating for example assessments and evaluations of education systems to an international organization can be a way of solving domestic challenges without losing face and rather increase its legitimacy as an independent body evaluates its policies (Martens 2005). Two reasons for this could be that the nation state lacks the domestic expertise, or there is a strong domestic opposition in the country. The position of OECD as an expert community is thus very important. Porter and Webb (2004) describe these tendencies in the following way:

One possible motive might be to use the OECD's imprimatur of authority to shift domestic public opinion in favor of policies preferred by the government (or by some agencies within government) ...of governments that do sometimes use OECD reports to influence public opinion among their own constituents, such a strategy reveals something important about the OECD; public and elite opinion pays attention to the OECD because it is viewed as an authoritative source of expert policy advice. (Porter and Webb 2004:9)

With globalization, there is reason to believe that states want to look at their own policies in broader contexts, and that also makes them more willing to participate in multilateral processes (Martens 2004). In OECD contexts, this goes for member countries but also, seemingly, for many non-member countries. For example, countries have to be asked to be reviewed. South Africa was reviewed by the OECD in 2008, presumably after certain South African initiatives. Martens (2005:13) further refers to an interview with OECD staff who describe that "Scandinavian countries are always willing – not only willing, they are looking for the opportunity every four, five years to come to the OECD". Policy learning is hence a relevant aspect of the delegation that takes place. When the evaluation has come, you cannot ignore the result and have to show some vigor to act. Thus, it also becomes a reference point in an international rather than a regional context (Ioannidou 2007).

It is only in the last decade that Norway has intensified its involvement in OECD activities and programmes, but already in the late 1970s, the national government approached the OECD for a review of its educational system:

Norway wanted this examination, during recent decades many changes have been made in our educational system, involving extensive national discussion and debate, and it was time for us to exchange opinions with outsiders... We have tried to filter, and to seek solutions at home rather than just copying. This makes it particularly important for us to be examined, observed, and corrected from the outside. Indeed its conclusion may prove to be constructive external validation of ideas already under internal consideration. Conducted in an OECD context a review has added value of informal comparisons by educational peers with experience of differing political and cultural background. (Kogen 1979:56-57)

Martens (2005) states that smaller countries are more willing to have reviews conducted, while larger countries are more reluctant. Smaller countries, and I would add also less developed countries, are more dependent on external expertise. Also, governments often approach the OECD when there is national opposition against new policy ideas or reforms, as was the case in Norway. An interview with an OECD staff member states for example, that “they are looking for a club they can use in the domestic political debates if it is a good political review. It’s a way of getting an extra position on the opposition argument” (Martens 2005:16). Martens (2004) has also found that national governments can be involved in selecting the examiners leading and conducting the review, and in this sense, countries have much influence on the review due to the fact that it can be helpful to one’s own policies and that one may want to use this against domestic opposition (Martens 2005). The OECD can thus be useful as an external authority in what can be described as a kind of indirect coercion (Pratt 2004). It is against this background that Martens describes the processes of delegation from a principal (the national government) to an agent (the organization) as (ab)using the IO.

5.5.3 Neo-liberalism, neo-realism and neo-marxism

Neo-liberalist theory would suffice to explain why states involved in education policy-making might enhance their economic competitive advantage. This could be especially relevant with regards to smaller OECD member countries and also developing non-member countries. The interpretative logic could also explain why the USA was eager at the start of the OECD work in the field of education; however it does not explain why it seems more reluctant to become involved in the programmes now, as is also the situation for Great Britain. These countries have on the other side more expertise within their own countries and it may seem that they are not in need of the ideas and activities that the OECD disseminate. Maybe this is so because the ideas to a greater extent can be traced back to these states, especially the US. Developing countries on their side are in a much greater need of the OECD, also as they know that highlighting this idea would increase the opportunity for external funding and assistance. To be accepted in the right circles, one must behave in

appropriate ways (Keohane 2006). The liberal argument also includes an emphasis on the functionalist work field, and that this system is more prominent than the geographically defined field of work (Hovi and Underdal 2000). This also leads to a greater cohesion across societies and cultures. The antagonist understandings of the globalization discourse, which emphasizes the democratic and civic perspective, may also be related to the paradigm of radical liberalism.

While neo-liberalism argues that the influence is a two-way process, neo-realism emphasizes that the influence is a one-way process, from nation states to the IO, and that the organization is mainly used as a tool for more powerful member states (Hovi and Underdal 2000). Under a neo-realist model, it would be argued that countries want an international organization working within the field of education to help them as a means to overcome coordination problems. From a realist perspective, cooperation will improve both domestic and global economic welfare, but the nation state is the dominant actor. This may explain why the USA and Great Britain may have pulled out of several OECD activities, but it can not explain the continuous involvement of both member and non-member countries in the informal character of the OECD.

Neo-marxism would emphasize the creation of international cooperation in the field of educational influence, especially in the case of non-member OECD countries and that this is problematic given the fact the education is a powerful ideological tool. As the analysis has shown, certain ideologies are hegemonic and the question, given a neo-marxist logic is first, whether developing countries have any influence in the organization and second, if standardization and imported ideas and activities would be mainly Western and thus of little relevance in other contexts. This could lead to exploitation of developing countries as they are also non-members and thus have little influence. Furthermore, from a more educational point of view, it can be argued that the inequalities between the core and the periphery might be worse as the standardization increases, even if this is not the intention from developed countries. With this in mind one could say that neo-marxism focuses on the possible problems that might be created under a hegemonic OECD in the policy field of education.

5.6 Summary

This chapter has focused on the question of the governance dimension of the OECD and how the dissemination of ideas influences educational policy making. Hegemonic discourses seem to influence educational policy making on a global scale, and thus it is important to analyze and reflect upon the construction of these discourses and what ideas and norms constitute central understandings, as the discussion in this chapter has shown that the governance dimension is closely connected to the dissemination of these ideas. The constructivist approach seems to give good interpretation with regards to the importance of ideas as well as the interconnectedness between the OECD and national governments. The dissemination of ideas is a powerful tool, and can also be described as governance of opinion formation and governance by coordination. Further “the idea game” can be an important interpretative logic for understanding the environment that is created around the work of the OECD in the policy field of education. Especially institutionalism can give insights into how nation states act according to what is regarded as appropriate behavior. Also, in this logic, IOs in many ways teach nation states new norms of behavior.

The constructivist paradigm thus seems to be very important and relevant as to explain and understand how IO governance works. On the other side, more rationalist theories can give additional perspectives that are important to understanding the complexity around IO governance in the policy field of education. It is therefore important to highlight first and foremost how the different theories work as analytical tools, as there are no clear distinctions between the different theories, and most researchers would not place themselves unambiguously within one theoretical school (Hovi and Underdal 2000). This is also emphasized by Keohane (2006) who states, “in my view, students of world politics should be seeking to integrate their insights rather than pitting them against one another in a gladiatorial contest” (p.76). The discussion towards the end of this chapter has therefore aimed to show how different theories can expand knowledge about the phenomenon that we study. At the same time, it is important to recognize that the ontological and epistemological foundations have crucial implications for the scope of the analysis, and this study has aimed to show how a constructivist approach may be fruitful in investigating prominent discourses and OECD governance in the field of education.

6. Concluding remarks

The research questions in this study have been; What are the prominent discourses within the OECD work in the field of education? How does the dissemination of ideas have an impact on education policy making? The curiosity to explore such a question has arisen as a result of studies in both education and political science, and also from experiencing an increasingly and more frequent emphasis on OECD activities in the field of education; both on the political, public and academic arena. To address the research questions, I have used two analytical strategies. First, I have performed a discourse analysis of an OECD publication, as well as certain other documents, in order to investigate present trends and hegemonic discourses. Second, I have applied a theoretical study based on existing literature in order to examine and discuss the governance dimension of the OECD and the interconnectedness it enjoys with national educational policy making. My theoretical framework has been within constructivism, but also including rationalist interpretations in order to gain a greater understanding of the research that has been conducted.

The constructivist approach has given a richer understanding of how the OECD works as an IO. The OECD has increased their jurisdiction (Porter and Webb 2004) in the last two decades especially, both thematically and geographically, and their presumably successful soft governance approaches are difficult to explain by means of rationalist logic. Extensively used activities such as reports, statistics and assessment studies are performed by experts in their fields, and the work of the OECD is hence regarded as scientifically reliable information that is widely recognized and used, and seldom questioned in terms of validity. This perceived apolitical objectivity is also what has been examined in this study, both in terms of investigating dominant and alternative understandings and in terms of how this objectivity seems to serve an important function in terms of governance. By analyzing what beliefs and discourses are prominent within the OECD work in the educational field, it is also possible to investigate how certain ideas, norms and values are constructed and consequently highlight certain norms and values in the eyes of others. Globalization discourse with a prominent neo-liberal stamp is thus disseminated through books, reports and other activities. The discourse in a way defines standards of what in an institutionalist interpretation would be labelled as appropriate. In this way, the OECD discourses and activities are attractive to states that would like to appear as future-orientated, liberal and efficient (March and Olsen 1998). From

this perspective, the ideas of socialization, identification and political subjectivity become relevant. Through identifying with hegemonic political discourses, nation states are influenced to perform in certain ways. Inspired by Bacchi (1999), I will argue that discourses developed in a think tank like the OECD can serve as so-called bridge discourses, which have the potential to mediate between the IO and the nation state.

Even if the involvement in OECD programs in the educational field is important in terms of constituting the identities of the member countries, the attraction of OECD norms and ideas are seemingly world-wide and not only limited to OECD member countries. Programs and ideas have become a reference point for national policy making as well as for non-members, and the dissemination of ideas may thus lead to a greater extent of standardization. Constructivism seems adequate for explaining how political processes and practices are socially constructed, and why it is so important for states to comply with the norms of and how they should act. There seems however, to be a two-way influence between the IO and the nation state. The study has shown that the OECD influences national policy making in several ways, but at the same time, institutional discourses and conditions will affect a state's decision to comply with or defect from norms within international organizations. Also, nation states are taking initiative and participating in these different studies, and they have played and still seem to play an important role in terms of ideas and activities within the OECD. Also, IOs that are driven and dominated by larger and often Western countries are likely to represent those countries' interests at the expense of smaller ones (Leuze et al 2007). The active role of IOs in the field of education and knowledge politics has by many been viewed with some mistrust, with reference to the ideologies behind the activities. Porter and Webb also (2004) argue that the increasing interests and efforts of the OECD in this area should not be viewed as an area of little significance for world politics, as it seems to be powerful in terms of a reproduction and development of practices that shape an increasingly harmonized political and economic system.

When increasing international activities in education take place, however, there is reason to ask to what extent IOs are complementing or even taking over the design and provision of education policies (Leuze et al 2007). This seem to be an over-exaggeration, but it highlights an important question with regards to the need of more knowledge in this area, both concerning more specific social consequences on national level as well as to the (global) governance dimension of the OECD work in the field of education.

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