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Contextualizations and Recontextualizations of Discourses on Equity in Education

Thesis for the degree of Philosophiae Doctor

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Norwegian University of Science and Technology
Faculty of Social Sciences and Technology Management
Programme for Teacher Education



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Preface

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Trondheim, June 2009

Cecilie Rønning Haugen

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PART 1: A FRAMEWORK FOR ANALYZING DISCOURSES ON EQUITY IN EDUCATION

1. Focus and Research Questions

The point of departure for this thesis, entitled *Contextualizations and Recontextualizations of Discourses on Equity in Education* is in the field of policy studies. I provide a relational analysis between two main discourses on current educational policies which apparently are disconnected: *equity* and *learning strategies*. The thesis consists of five separate studies, where the goal is to address the main thesis question: **How can the relationship between current discourses on equity and learning strategies be interpreted in a power perspective through principles of contextualization and recontextualization¹?**

The thesis has the following structure: in part one I will operationalize the two concepts and position the study within the field of policy studies. Then, I will outline the methodology in which Critical Discourse Analysis (CDA) (Fairclough & Wodak, 1997) and Basil Bernstein's (2000) concept of the Pedagogic Device are the main frameworks. CDA and the Pedagogic Device represent the logic of the design and interconnectivity of the studies, and are used to theorize the key concepts in both the thesis question and title.

In the methodology section, I will present summaries of and discuss the five papers, demonstrating the relationship between them and how the collective results respond to the main thesis question. However, the papers themselves will be presented in part two of the thesis.

It needs to be said that as each paper stands as a separate text, the reader will find that some parts are repeated. This repetitiveness is difficult to avoid as the context and the methodological and/or theoretical approach of the studies are sometimes the same. However,

¹ The principle of recontextualization is described through the Pedagogic Device (see 2.3.1), and forms an important part of this thesis, as it represents the “bridge” between macro policies and micro practices on equity. I have also chosen to use the concept of *contextualization* (see 2.5), as I regard each paper to represent a context for the others. Due to this, I suggest that moving from the macro to the micro level is not a linear process, but the policies from the macro level also have to be understood in relation to the micro level. When one of the papers is placed in the foreground, the others form the background.

the five papers have different focal points and respond to different “parts” of the main thesis question within the different fields of the Pedagogic Device.

1.1 Globalization of Education

Education is regarded as one of the most important elements in state formation (Wong & Apple, 2003): “State formation is the historic trajectory through which the ruling power struggles to build a local identity, to amend or pre-empt social fragmentation, and to win support from the ruled” (Apple, 2002, p. 612). Furthermore, and inseparable from this, education is regarded as an important tool for economic development (European Commission, 2008, White Paper no. 16, 2006/2007). However, the nation state might not be the only agent influencing the content of the educational policies aimed at state formation and economic development.

In the globalized world, and through international organizations such as the OECD, we find a competition between countries as to whose educational system is best equipped to prepare its citizens for the future society. This international competition represents one definition of what is deemed to be important knowledge citizens must have to succeed in the future society.

Tests such as the PISA study are what the OECD bases its reports on and where the status of various countries’ educational systems and practices are described. In the future, the OECD’s policies may affect national educational policies by pressuring institutions to improve results on international tests. However, *how* nations respond to policies proposed by the OECD must be studied locally, as there may be different responses that are dependent on the political situation and local educational culture. Nevertheless, as global trends may have a huge impact, national policies must be examined in comparison to global educational trends when attempting to analyze and understand current educational policies. This is also pointed out by Apple, Kenway, & Singh (2005, p. 10):

No analysis of contemporary transitions in education policies, pedagogies, and politics can be fully serious without placing at its very core sensitivity to the ongoing struggles over “globalization from above” that constantly reshape the terrain on which educators of all kinds operate. This terrain ranges across local communities through the nation-state to transnational agencies of global civil society.

In this thesis, my aim is to examine the relationship between global educational trends and Norwegian policies by comparing OECD's and Norwegian educational policies on equity. An important focus in this approach is the relationship between power and discourses on equity.

1.2 Power and Discourses on Equity

Ideas on education and knowledge form discourses on educational policies, where the interests and voices of some are included, while others are excluded: "Discourses are about what can be said, and thought, but also about who can speak, when, where and with what authority" (Ball, 1994, p. 21). The importance of language in this context is pointed out by Clarke and Newman (1997, p. xiii):

language can be appropriated by different groups for different purposes: it forms a distinct terrain of political contestation. This terrain is of critical importance because of its place in the struggle for legitimacy. The success of any change project, whether initiated by government legislation or by organisational managers, depends on the success of its claims for legitimacy and its ability to win the "hearts and minds" of those on whom it impacts.

In current educational policies and rhetoric *equity* is an important topic. Globally, much attention is focused on the lack of equity in the field of education, where some groups are privileged and others are not. The concept of equity is a key component of any democracy, and thus becomes important in the struggle between different political and ideological interests. This means that different interpretations of equity can be formed depending on one's ideological and political standpoint. In other words, the discourse on equity is never neutral but consists of power relationships where some groups may be favoured over others (see Ball, 1994). When addressing equity, proposals for its improvement have to be integrated within the various social groups' political interests, which may be advanced in the *name* of equity. As Odora Hoppers (2008, p. 10) states: "...social justice has still been largely defined by whatever the strong decided. Social justice is therefore both a philosophical problem and an important issue in politics".

As the concept of equity is of such importance in the political arena, I find it important to question/reveal how political interests may be hidden when establishing the basis for current educational policies and practices of equity. In other words, I will investigate how the concept

may serve a rhetorical function by relating current discourses on equity to the interests of various social groups. This will be shown in the first three papers, where I focus on how equity is addressed by both the OECD and the Norwegian socialist-alliance government.

Another element of interest that I will investigate is *learning strategies*, and how they may be related to the current interest in equity. How these elements may be linked will be explained later.

1.3 Learning Strategies – Practices for Equity?

The focus on learning strategies is interesting as it is a recent “phenomenon” in Norwegian educational policies. The PISA survey from 2000 tested students’ learning strategies. Due to the poor results, it was recommended that Norway devote more time to these strategies in schools (Brøyn, 2002). Consequently, a focus on learning strategies was introduced in White Paper no. 30 (2003-2004), and then integrated into the curriculum through the reform entitled Knowledge Promotion (2006). These strategies were outlined as knowledge to be focused on in all learning in the “Learning Poster” (2006). Therefore, they are considered to be highly important in the education of Norwegian students. Learning strategies have also been focused on in other countries, for example, the National Reading Panel of the USA has also argued for the implementation of these strategies, thus demonstrating that Norway’s focus on learning strategies in its educational policies is most likely influenced by the international attention given to this specific topic (cf. Santa, 2008).

The field of learning strategies has been developed at universities researching the characteristics of good learning (Weinstein et al., 2006), and how this can be taught to students who need to improve their learning skills. One example of this is an American learning strategy project that has been introduced in many Norwegian schools: the CRISS Project (CReating Independence through Student owned Strategies), which is examined in papers 4 and 5, where I also investigate how teachers and students practise this specific learning strategy project.

I will now explain how the investigation of discourses on equity and learning strategies can be positioned in the field of policy studies.

1.4 Policy Studies

Policy studies can be categorized as both the analysis *for* and the analysis *of* policy (Olssen, Codd & O'Neill, 2004). In the former, the goal is to provide information for policy construction, while in the latter it is to critically examine existing policies, with this study being oriented towards the latter, and which can have two different approaches:

(1) analysis of policy determination and effects which examines the inputs and transformational processes operating on the construction of public policy (Gordon et al., 1977: 28) and also the effects of such policies on various groups; and (2) analysis of policy content, which examines the values, assumptions and ideologies underpinning the policy process (Olssen et al., p. 72).

This thesis addresses all these elements to a certain degree. With respect to the analysis on policy determination and effects, I investigate equity discourses in the OECD and in Norway. Through this investigation, I **examine how the Norwegian government responds to recommendations for improving equity as recommended by the OECD**. In addition to analyzing policy documents, I will **evaluate the CRISS project described above, which targets equitable trainability in Norwegian schools**. My aim is to undertake a *relational analysis* (cf. Apple, 2004) between equity discourses on the macro level, and to focus on learning strategies in both educational policies and practices at schools. According to Apple, a relational analysis:

involves seeing social activity – with education as a particular form of that activity – as tied to the larger arrangement of institutions which apportion resources so that particular groups and classes have historically been helped while others have been less adequately treated. In essence, social action, cultural and educational events and artifacts (what Bourdieu would call cultural capital) are “defined” not by their obvious qualities that we can immediately see. Instead of this rather positivistic approach, things are given meaning relationally, by their complex ties and connection to how a society is organized and controlled. The relations themselves are the defining characteristics (Apple, 2004, p. 9).

In fact, if one were to point to one of the most neglected areas of educational scholarship, it would be just this, the critical study of the relationship between ideologies and educational thought and practice, the study of a range of commonsense assumptions that guide our overly technically minded field (Apple, 2004, p. 12).

Important questions in this relational analysis between discourses on equity and learning strategies are:

- 1) Why are learning strategies being implemented in Norwegian educational policies and practices?
- 2) How can we understand the relation between them and the current focus on equity as described by the OECD and the Norwegian socialist-alliance government²?

This expands the transformational processes on the construction of public policy (cf. citation from Olssen et al., 2004 above) at the macro level so that the micro levels are included in this analysis, underscoring the need to examine the possible effects of these policies. As this study investigates the subject of equity in education, the interpretations of learning strategies and how these may relate to social background are especially important. As a result, I analyze all elements regarding policy determination and effects to some degree. To describe the relationship between them, the concept of *recontextualization* has to be studied to assess how the macro and micro levels interrelate, which will be explained in point 2.3 below (cf. The Pedagogic Device). In other words, the analyzed transformational process shows how macro policies on equity are transformed and implemented into pedagogic practice. This analysis will focus on the practices of the CRISS project.

However, the main focus of the entire study is how educational policies and practices may relate to power and ideology. Elements of policy content (cf. citation from Olssen et al., 2004 above) are also vital, as this study investigates the relationship between *equity, power and class*, as well as addressing these issues on both the micro and macro levels. These issues are not separate, but included on all levels. As Olssen et al. (2004, p.3) state: “... educational policy must be contextualized both nationally and globally as a transformative discourse that can have real social effects in response to contemporary crises of survival and sustainability...”. More specifically, the goal of this study is to investigate the connection between power, knowledge and cognition, and its transformational process.

A theory that describes this relationship, thus becoming a useful tool for the analysis, is Basil Bernstein’s (2000) concept of the Pedagogic Device. Combined with important aspects from

² The socialist-alliance government is formed by the Labour Party (receiving the most votes), the Socialist Left Party and the Center Party (agrarian).

Critical Discourse Analysis, the Pedagogic Device represents the logic of the design and the interconnectivity of the studies in this thesis.

2. Discussing Critical Discourse Analysis (CDA) and the Pedagogic Device

Critical Discourse Analysis (CDA) aims to theorize, problematize and empirically investigate the relationship between discursive practice and social and cultural developments in various social contexts (Jørgensen & Phillips, 1999). CDA does not represent one uniform methodological approach (Jørgensen & Phillips, 1999; Fairclough & Wodak, 1997; Van Dijk, 2001). It is argued that the researcher must develop a design in accordance with the specific interests present in the study. There are several relevant principles in CDA, which, needless to say, cannot all be in focus when conducting specific research. This research project will be measured against eight key aspects described by Fairclough and Wodak (1997) and given as points 2.1-2.8 below.

First, it should be stated that within a critical discourse analysis, theory is hard to separate from the methods used (cf. Jørgensen & Phillips, 1999). In other words, the theoretical approach forms part of the methodology. Basil Bernstein's theories have been acknowledged as a theoretical approach that can be combined with CDA in a manner that yields insight (cf. Chouliaraki & Fairclough, 1999). This has in many ways been the guiding principle of this study. Therefore, key theoretical frameworks that are relevant to this study will be presented and related to each of the eight aspects of CDA.

In the following, I will outline and give reflections on this study.

2.1 CDA Addresses Social Problems

CDA focuses on linguistic aspects of social processes and problems, where the key claim is that "...major social and political processes and movements ... have a partly linguistic-discursive character" (Fairclough & Wodak, 1997, p. 271). As noted in the introduction, the focus in this project is on the lack of equity in education (cf. introduction).

However, how to improve the equity situation is not a given. More specifically, in this project I will examine how equity is addressed today. By searching for *meaning*, I will analyze its ideological foundation to critically investigate whose interests are present in the current equity orientation, as expressed in the educational policies and practices. Bernstein's Pedagogic Device provides one way of analyzing and theorizing how power and control are anchored in knowledge and pedagogy³, which favours some social backgrounds over others.

2.2 Power Relations Are Discursive

Power relations are exercised and negotiated in discourse. One way of defining discourse is to see it as a way of speaking, which provides meaning from a specific perspective. As described in the introduction, discourses are essential to gaining power, and here, defining what "equity in education" means is of key political importance.

Throughout this study, the power perspective is important and will thus be treated in each paper. Therefore, I examine power relationships within discourses on equity as addressed by the OECD (papers 1 and 2), the Norwegian socialist-alliance government's response to the OECD's recommendations on equity (paper 3), and teachers' practices and evaluations of students' practices in the above-described learning strategy project CRISS (papers 4 and 5).

When analyzing discourse, two dimensions should be focused on (Jørgensen & Phillips, 1999):

- 1) The communicative event (which is a specific use of language, i.e. policy documents, pedagogic practices, or students' texts); and
- 2) The order of discourse, which refers to the types of discourse used within a specific social institution, and which consists of discourses and genres that will be explained below.

³ Bernstein (1977) describes different orientations to knowledge and pedagogy as "collection and integration codes" and "visible and invisible pedagogies". Their characteristics and how they may relate to power is described in paper 3 and 4.

2.2.1 The Communicative Event

Every use of language is a communicative event and contains three dimensions:

- 1) It is a text
- 2) It is a discursive practice containing both production and reproduction of discourse, and
- 3) It is a social practice

These three elements are not easily separable. However, when analyzing them, different communicative events should be the centre of focus, such as policy documents, teachers' pedagogic practices, students' practices, both the text itself and how it forms part of a discursive practice and social practice (Jørgensen & Phillips, 1999).

To deal with this distinction, Hodge and Kress (2001, p. 294) distinguish between text and discourse, describing text as "... a structure of messages or message traces which has a socially ascribed unity". This is different from discourse which "... is often used for the same kind of object as text but we will distinguish the two, keeping discourse to refer to the social process in which texts are embedded, while text is the concrete material object produced in discourse".

In other words, the text projects a specific version of reality. Important analyses of the *text* in this context will examine how specific orientations to equity are characterized by a vision of society and social identities which in turn construct a vision of how these images can be created through specific pedagogic and knowledge orientations. In this lies an analysis of the *text per se*. More specifically, I discuss how the equity orientation described in White Paper no. 16 can be related to a Totally Pedagogized Society (paper 3). This vision of a future society depends on individuals being "trainable" so they can adapt, depending on what the society needs and what specific identity it wants to assume. To create such individuals, there must be knowledge modes focusing on trainability. Such modes can be related to what Bernstein describes as "generic modes". An example of such a mode, I argue, is the focus on "learning strategies" in educational policies and practices (papers 4 and 5). These concepts are key elements in describing current orientations to equity as analyzed and described in the five papers of this study, and where each paper provides a contextualization of the others. Together they create a larger coherent "text" on current policies and practices aimed at more equity.

However, as also will be demonstrated, *who* actually will be trainable through the learning strategies project will most likely depend on social background, and thus when the text expressed in the policy documents meets the discursive orientations in school, the coherence is lost. In other words, the way in which equity is addressed in the policy documents may not reflect/mirror how school tends to favour certain backgrounds over others due to its social and cultural foundation. This is an extremely interesting point that I will examine below.

2.2.2 The Order of Discourse

Bearing in mind the above-mentioned distinction between text and discourse, in order to analyze orders of discourse in this context, I focus on how specific understandings of education relate to specific power interests. This implies that central discourses relate to a “new middle-class discourse” and an “old middle-class discourse”, which are competing interests vying for influence, as described by Bernstein (1977).

The old middle class (essentially from the 19th century) was based on the transmission of specific and unambiguous values, a visible pedagogy consisting of a clear hierarchy and criteria, a positional form of social control. The new middle class, on the other hand (mid to late 20th century formation), supports new forms of social control which are more personalized and have a more invisible form where hierarchy and criteria become more implicit and invisible (Bernstein, 1977). These competing views on knowledge and pedagogy are interesting when analyzing current equity discourses in educational policies and practices. However, when the aim is to examine equity discourses, Bernstein does not provide a view on how equity may be addressed in his theories.

Therefore I chose to combine Bernstein’s theories on how different orientations to knowledge and pedagogy are expressions of different social groups’ interests with Solstad’s (1997) models: *equity through equality* (traditional school) and *equity through diversity* (diversity school)⁴. These models are referred to but not treated specifically by Bernstein (2000). Solstad

⁴ In the OECD report analyzed in paper 1, the authors “..operationalize equity by estimating how strongly the educational achievement measured by PISA test scores depends on the socio-economic background of the students’ families in each country. Specifically, we use the Index of Economic, Social, and Cultural Status (ESCS) that was provided by PISA as our measures of SES. The size of the achievement difference between students with high and low values on the ESCS index provides a measure of how fair and inclusive each school system is: The smaller the difference, the more equally distributed is educational opportunity” (Schütz et al.,

claims that the equality school likely will reproduce inequities, while the diversity school is more likely to improve equity. However, I argue, when addressing power and control in both models in a Bernsteinian sense, a more critical approach can be employed to see how school can reproduce power relations through its knowledge and pedagogic orientations. From a perspective based on Bernstein, I argue that the equality model is characterized by an old middle-class discourse, while the diversity model is characterized by a new middle-class discourse. Thus, the question is whether the two equity models first of all are agents for different social groups' interests. This is because according to Bernstein (1977, p. 128) “[t]he opposition between middle-class factions is not an opposition about radical change in class structure, but an opposition based upon conflicting forms of social control”.

In relation to this question, Sadovnic (2003, p. 12) claims that we are now witnessing:

a major conflict between agents of the Economic Field and agents of the Pedagogic Recontextualizing Field, as corporate leaders and their experts challenge professional educators on how to improve schools for all children. Both groups attempt to influence the Official Recontextualizing Field of the state and its departments of education in a battle for who will control the schools and how new knowledge forms will be transmitted, acquired and assessed.

Different discourses on equity related to these power interests can be described as different “genres” or different coding modalities⁵ (cf. Chouliaraki & Fairclough, 1999).

As policies are always compromises, it is probable that both equity discourses described above and different genres are addressed to some degree. By focusing on the order of discourse, which in this context is delimited to the two competing equity discourses described above, I also demonstrate what orientations to equity are *not* chosen, and furthermore, how they are combined. Using this method, I demonstrate how compromises and alliances may be constructed in the equity orientation of both the OECD and the Norwegian government, thereby creating new discourses. This, it is argued, is an important focus in discourse analysis (cf. Chouliaraki & Fairclough, 1999) and in critical research on educational policies (cf. Apple, 2006).

2007, p. 9). It is important to point out here that *equity* and *equality of educational opportunity* are synonyms in the OECD report, and the operationalization in the report is different from my approach when I analyze equity.

⁵ Coding modalities or “genres” can be specified in terms of the analytic tools “classification” and “framing”. How these may be used in relation to the equity models from Solstad (1997) is described in paper 2 and 3.

In this analysis, the discourse on “conservative modernization”, as described by Apple, is important in describing the “hybridization” of the new and old middle-class discourses. Through this hybridization, the focus on traditional values and knowledge (neo-conservatives), the focus on market control through individual choice (neo-liberalism), the restoration of morality (authoritarian populism) and quality improvement through testing (new managerial middle class) are emphasized:

The seemingly contradictory discourse of competition, markets, and choice, on the one hand, and accountability, performance objectives, standards, national and state testing, and national and statewide curriculum, on the other, has created such a din that it is hard to hear anything else. Even though these seem to embody different tendencies, they actually oddly reinforce each other and help cement conservative educational positions into our daily lives (Apple, 2006, p. 55).

From the analysis of power in genres and discourses, I will move to the third main element in CDA, which describes how discourse constitutes society and culture.

2.3 Discourse Constitutes Society and Culture

We can only make sense of the salience of discourse in contemporary social processes and power relations by recognizing that discourse constitutes society and culture, as well as being constituted by them. Their relationship, that is, is a dialectical one. This entails that every instance of language use makes its own small contribution to reproducing and/or transforming society and culture, including power relations. That is the power of discourse; that is why it is worth struggling over (Fairclough & Wodak, p. 273).

The dialectical relationship is quite important here, as Bernstein’s theories also examine how a person’s relationship to the material base contributes to shaping consciousness. In other words, reality is not only constituted by discourse, but also by a material world.

2.3.1 Theoretical Framework: The Pedagogic Device

In his Code Theory, Bernstein focuses on the way power works within and through knowledge and pedagogy in schools. The Pedagogic Device is a vital tool for capturing how power works on both the micro and macro levels, and how the different arenas of cultural production, reproduction and transformation of culture are related. This has served as the guiding principle in the development of this study, and describes the logic of the

interconnectivity of the five papers. “The Pedagogic Device acts as a symbolic regulator of consciousness; the question is, whose regulator, what consciousness and for whom? It is a condition for the production, reproduction and transformation of culture” (Bernstein, 2000, p. 38).

Through the concept of the Pedagogic Device, Bernstein tries to express the “grammar” of how this occurs. This grammar has three interrelated “rules”: *distributive rules*, *recontextualizing rules* and *evaluative rules*. These are hierarchically organized, where the first is at the top. I will now examine these rules and position the different studies of this thesis within the different arenas of the Pedagogic Device⁶, and in this way demonstrate their logic and interconnectivity.

Distributive Rules

The *distributive rules* distinguish between two different types of knowledge: the *thinkable* and the *unthinkable*. The structuring of meaning assumes a form which relates the thinkable and unthinkable by both referring to a material world and an immaterial world. However, the form this meaning has consists of power relations: “... the meanings which create and unite two worlds must always be meanings where there is an indirect relation between these meanings and a specific material base; there is a specific social division of labour and a specific set of social relationships within that division of labour” (Bernstein, 2000, p. 30).

The indirect relation to the material base is important here, as it is the space between the material base and meaning that constitutes the arena for power struggles. This is the arena in which the yet to be thought, the relation to the future and ideology come into play, and the arena the different social groups are vying to control. In other words, the distributive rules refer to the field of the production of discourse. Related to this analysis, the distributive rules define how we should think about school and knowledge in relation to state formation from an equity perspective. Normally, the distributive rules are established by the dominant political party of the state. However, as argued earlier, current national educational policies must be investigated from a global perspective. The distributive rules are investigated in three of the

⁶ I present the sequence of the papers in the reverse of how the study was developed because I relate each study to the explanation of the Pedagogic Device, which has to be presented by means of this logic. I maintain that the sequence is not important, as all the papers serve as backgrounds for the others.

papers, where two of them investigate power and the discourse on equity from the OECD, and one investigates White Paper no. 16 (2006-2007).

Paper 1: OECD for Conservative Modernization?

In paper 1, I try to find the ideological foundation/political agenda of the OECD by analyzing a report which presents research on accountability, autonomy and choice in relation to equity: *School Accountability, Autonomy, Choice and the Equity of Student Achievement: International Evidence from PISA 2003* (Schütz, West & Wössmann, 2007). This report addresses recommendations for improving equity at the *general level*. In the report, the authors argue strongly for the implementation of a combination of the three words (accountability, autonomy and choice) to improve the equity situation for all countries. These words are the key to the above-mentioned educational trend that Apple (2006) describes as *conservative modernization*. This report presents general recommendations for all countries, and thereby does not relate the question of equity in education to national considerations. The OECD's work received additional funding from Norway. In the paper, I undertake a critical reading (cf. Chouliaraki & Fairclough, 1999) of the evidence presented, and of the logic and quality of the research undertaken by the OECD.

I find the report to be more of a political proclamation for conservative modernization than a serious research project investigating equity. This is due to a concise tendentious reading of the evidence presented, the problematic operationalization of the four key words (accountability, autonomy, choice and equity), a lack of context sensitivity, a lack of explicit theorization and an explicit political foundation, and the problematic use of language and rhetoric in the report. Due to all this, I claim that the authors hybridize a research genre with a political genre, where I suggest that political interests may be disguised, cloaked in the name of both *research* and *equity*, and that the authors use these concepts to promote specific interests, creating a discourse of conservative modernization in education.

From the general approach to equity described in the OECD report, I move on to more contextually oriented reports on equity from the OECD.

Paper 2: A Comparative Analysis of Equity Models in OECD Country Notes

This analysis moves from approaching equity in the OECD on the general level to analyzing more context-sensitive approaches. To examine this, I focus on the OECD thematic reviews on equity for two countries with rather different orientations to education: Spain and Norway (for a further explanation of why I chose a comparative approach and why these two countries were selected, see paper 2). Is there a common approach to equity expressed in the two country notes, and how does this relate to ideological and political interests? How do the different orientations to equity expressed here compare to paper 1? The goal of this study is to investigate whether the approach to equity by the OECD would be different in more context-oriented research, or whether the equity recommendations on the distributive rules of the OECD would be the same and independent of context.

As discussed above, I combine Solstad's (1997) models with the way Bernstein approaches power and control to analyze equity orientations.

More specifically, I examine the following thesis questions:

- 1) How do the pedagogic and knowledge recommendations on creating a more equitable educational system in the OECD reports relate to the models "equity through equality" and "equity through diversity"?
- 2) How do the recommendations relate to the educational trend "conservative modernization"?
- 3) In what ways can the OECD's recommendations on equitable education allude to or reinforce social stratification in the countries?

I find a similar orientation to equity addressed by the OECD for both Spain and Norway in this paper. As in paper 1, I find that to a large extent, the OECD also promotes a conservative modernization in its thematic reviews on equity in education for both countries. Although the two countries have educational systems and practices that are quite different, the recommendations, when taking into consideration the existing systems, promote a similar orientation to equity.

Paper 3: Equity in School and Life–Long Learning? An Analysis of Equity Models in White Paper no. 16 (2006/2007) of Norway

In paper 3 I move to the Norwegian socialist-alliance government's response to the equity review by the OECD as investigated in paper 2. Their response is especially interesting from a political perspective, as the OECD is often accused of promoting a neo-liberal agenda (Karlsen, 2006) (also part of the conservative modernization), while in Norway the Socialist Left Party, which is in the government for the first time, formed a coalition with the Labour Party (which received the most votes) and the Centre Party. This could possibly lead to a struggle over the distributive rules for equity in education between the OECD and the Norwegian government.

As in papers 1 and 2, I employ a power perspective with respect to equity orientation, and discuss how the described orientation may relate to interests of different social groups. Furthermore, as discourses potentially have consequences for cognition (Van Dijk, 2007), I discuss equity in terms of trainability.

When analyzing White Paper no. 16 from the Norwegian socialist-alliance government, I find that most of the recommendations from the OECD's thematic review on equity are addressed, and that conservative modernization is also present in the educational policies expressed by this government.

However, one important difference relates to the issue of privatization/marketization. The Norwegian government rejects the idea of parental choice. But the OECD said that Norway should implement a combination of parental choice, value added measures and national testing to improve equity (cf. paper 2). Although marketization is not something the socialist-alliance government pursues in White Paper no. 16, I argue that by using the definition of "good" and "bad" schools in the national measurement, parents with high socio-economic status will most likely want to reside in areas where these "good" schools are located. This may in turn force housing prices up, which then puts lower socio-economic status groups at a disadvantage. Therefore, existing demographic structures may be reinforced by those able to choose between schools because they have good resources. To manoeuvre within such "customer-oriented" systems, parents may need not only economic but also cultural capital. Although the government does not opt for choice-based systems, this may lay the groundwork

for more “customer-oriented” education when it provides information about what are “good” and “bad” schools.

Summary of the Distributive Rules

All in all, these three articles form an analysis of equity discourses on distributive rules, i.e. the thinkable in relation to the unthinkable, and on how equity in education is addressed today. Through the analysis of the three papers, I demonstrate that the state is clearly not the only agent in the state-formation project in Norway today. The socialist-alliance government’s policies express many similarities to those outlined by the OECD. The importance of the OECD is also demonstrated by the many references to the OECD and the PISA investigation in White paper no. 16. The governing parties in Norway are not the only agents formulating the distributive rules, i.e. how we think about equity in education in Norway today, as the OECD also seems to be a key agenda-setter for a conservative modernization of education.

One important contradiction that is expressed in all four documents analyzed in the three papers is how educational systems are governed. The state should focus on national measurements, while at the same time provide more autonomy to the schools and local authorities, employ a more multicultural focus, provide choices and satisfy the individual needs and wishes of the students. This can be related to the governance trend described as “centralized decentralization” (Bernstein, 2001) and conservative modernization (Apple, 2006), two terms which reflect the contradictions inherent in this type of governance. Bernstein (2001) maintains that this is a way of disguising power relationships, pretending that schools have more autonomy, while really controlling them through more invisible management strategies.

However, although we find contradictory governance initiatives, as in White Paper no. 16, there is a clear orientation towards improving the equity situation through stronger state involvement. Through more control of schools’ and citizens’ development, and by expanding education in every area for all ages, this type of orientation to equity may be related to the concept of the Totally Pedagogized Society (TPS) as described by Bernstein (2001). In the TPS, the state has strong central control over its citizens who are expected to remain in constant development, depending on what society needs them for. Related to this is the

concept of lifelong learning, followed by the concept of *trainability*. In the TPS, this is considered to be the most important competence to develop, and it is believed that citizens need to possess some basic competencies, regardless of context.

From the distributive rules of the equity discourse, which are oriented towards conservative modernization, the TPS and the trainable citizen, I move to the next level of the Pedagogic Device: the recontextualizing rules, which define *how* students should be taught to be trainable citizens to improve the equity situation.

Recontextualizing Rules

As the distributive rules regulate the legitimate discourse, the *recontextualizing rules* constitute the principle for the specific pedagogic discourse. In this arena, the distributive rules are recontextualized and serve as a principle which regulates the selective transmission and acquisition of them. However, the original discourse, as described through the distributive rules, has now been transformed. In the gap between the first discourse and its transformed form, there is also a gap where ideology comes into play. Through this transformation, the pedagogic discourse will never be identical with the discourses it has recontextualized.

Recontextualizing rules can describe the connection between equity discourses and learning strategies, where the latter is regarded as *one*⁷ way of instantiating the key elements from the distributive rules described in the three first papers with respect to the micro fields. The recontextualizing rules constitute the principle for how the expressed equity orientation forms a pedagogic discourse. Bernstein (2000, p. 32) defines pedagogic discourse as “...a rule which embeds two discourses; a discourse of skills of various kinds and their relations to each other, and a discourse of social order”. These two discourses are not separated from but rather embedded in one another, with the latter being the dominant one. Consequently, a pedagogic discourse focuses on skills, knowledge, order, relationships and identity. It focuses not only on the what and the how (the theory of instruction), but also on the criteria for character, manner, a model of the learner and the teacher, and of their relationship (the regulative discourse).

⁷ There are, of course, other recontextualizations of trainability taking place at the same time. Examples of this can be the focus on basic competencies, qualities considered important regardless of subjects. Due to the need to limit the study, the focus on learning strategies serves as *one* example of recontextualization of trainability.

As the distributive rules create a field of production, the recontextualizing principle creates a field of recontextualization in which new agents can introduce their ideologies. Bernstein creates a separation between the two different fields of recontextualization: the *official recontextualizing field (ORF)* and the *pedagogic recontextualizing field (PRF)*:

the former includes a core consisting of officials from state pedagogic agencies and consultants from the educational system and the fields of economy and symbolic control, whereas the latter comprises agents and practices drawn from universities, colleges of education, schools, foundations, journals and publishing houses, and so on – there is a potential for conflict, resistance, and inertia both within and between these two fields ... (Apple, 2004, p. 85).

However, the PRF can affect the pedagogic discourse independently of the OFR. Consequently, the educators in schools (who will be focused on in paper 4) have some autonomy (see also Apple, 2002) when working on learning strategies.

Learning strategies can be considered a specific genre connected to progressivism, a child-centred focus, in which the student is supposed to have a lot of impact on his or her own learning. This is exemplified through the principles of building on the student's prior background knowledge and activity, and the monitoring of one's own learning. The teacher and student practice in the above-mentioned American learning strategy project CRISS creates the *pedagogic text* of the learning strategies focused on in this curriculum (the project is described in papers 4 and 5).

Paper 4: Recontextualizations of Educational Policies: Background Knowledge in Teaching and Learning

In paper 4, I specifically examine how 14 teachers interpret the principle “to build on the student's prior background knowledge” in their teaching (based on observations and interviews). This principle is of great importance in the CRISS project. I have chosen to focus on this principle because by paying specific attention to the students' backgrounds, we can see that it carries the potential to challenge the existing power relationships in schools, and to challenge school culture. Thus, background knowledge is undoubtedly important to learning in school (cf. lack of equity due to school's reproduction of power relationships in society). Can the focus on background knowledge potentially mean to open to voices not traditionally

recognized, and thereby improve the school's role in creating equitable trainability, or is the cultural basis not taken into consideration? More specifically, I focus on the following thesis questions:

- 1) How may the interpretations of the CRISS principle of building on prior background knowledge influence knowledge and pedagogy?
- 2) How may the different pedagogic and knowledge orientations relate to power and thus to equity in the lifelong learning project?

In paper 4, while specifically examining 14 teachers' interpretations of the central principle of CRISS, "to build on the students' prior background knowledge", I find a number of interpretations. These different orientations may relate differently to certain factions of the middle class, which then may not improve the equity situation for the lower performing students. Through examples, I demonstrate that not *everyone's* background knowledge may be relevant in a school context.

The different interpretations from the teachers demonstrate that within the field of recontextualization, there is no common orientation as to how this principle should be interpreted and used, i.e. the pedagogic text of the CRISS project. This may be explained by the fact that learning strategies in the CRISS project are treated, to a high degree, as context- and content-independent knowledge (cf. generic modes described by Bernstein, 2000). This creates much room for interpretation, in which the CRISS strategies need to be adjusted in both content and context to create meaning. The CRISS project has a weak framework, and the question then becomes whether it can transfer meaning without relating to context and content, or if it therefore appears to be *meaningless*.

Due to the teachers' different interpretations on how to build on prior background knowledge, the intentions of the state or the power brokers who dominate the various fields relevant to the construction of pedagogic discourse, as described by Bernstein, may not easily lead to a fulfilment of the wishes for education and the future society. The pedagogic and knowledge orientations of the teachers vary both in form and power relationships. Additionally, some teachers reject the ideas of the CRISS project, as expressed in interviews, claiming to adopt it to their own convictions or deciding to only use parts of it. Due to this, the PRF may weaken

the position of the ORF. However, the question is whether the state increases its control over the teachers' practices through other means, such as implementing stronger governance (cf. paper 3).

Finally, we have the evaluative rules. These make up the third rule of the Pedagogic Device, which shows how the pedagogic discourse is transformed into pedagogic practice.⁸

Evaluative Rules

The evaluative rules condense the meaning of the whole Pedagogic Device and create a new field: the field of reproduction. When evaluating the response to the distributive and recontextualization rules, what counts as legitimate forms of consciousness for the students is condensed. In schools, students' performances are contested through the criteria of evaluation, on whether they meet the expectations as addressed from the fields of production (equity orientation), and from the field of recontextualization (learning to be strategic learners).

The reproduction field also possibly opens for conflict. Therefore, there may be a discrepancy between the fields of production (described by the distributive rules), recontextualization (described by the recontextualizing rules) and reproduction (described by the evaluative rules). For this project, the evaluative rules refer to the criteria for whether or not the student contests the expected acquisition of learning strategies. The evaluation of the student's performance can give one example of whether he or she acquires the desired consciousness/identity as expressed in the equity orientation of the socialist-alliance government (cf. paper 3). Whether the CRISS project can promote equitable trainability is treated in paper 5.

⁸ There is no clear line between the recontextualizing rules and the evaluative rules here, as the teaching is hard to separate from the expected learning. I have chosen to locate teachers' interpretations within the recontextualising field, since instantiations of the pedagogic text are done there, whereas the evaluation of the students' learning is located in the field of reproduction, through the evaluative rules. However, teachers' interpretations also form part of the field of reproduction, as pedagogic text and evaluation are inseparable.

Paper 5: Recontextualizations of Trainability: Learning Strategies and Social

Background

This paper illuminates the differences between high- and low-achieving students according to learning strategies targeted towards development and social background in settings where the CRISS learning strategy project is used.

More specifically, the thesis questions are:

- 1) What characterizes the learning strategies (for acquisition of information, organization of information, to build on prior background knowledge, and control their own learning and activity) of high- versus low-achieving students in pedagogic practices where CRISS is claimed to be used?
- 2) What characterizes high- versus low-achieving students' home background according to the parents' educational level and parenting behaviour?
- 3) Can the CRISS principles claim to be "designed for all learners" in a school context? Why or why not?

When analyzing high- and low-achieving students' interpretations of CRISS, I find huge qualitative differences in their interpretations. This applies to all the CRISS principles: Acquisition of information, organization, elaboration and the monitoring of one's own learning activities. An important difference in the material described is that the low-achieving students tended to use principles dependent on specific context, while high-achieving students tended to use principles independent of specific context.

All students categorized as high-achieving and relying on an independent principle when working with CRISS came from higher socio-economic backgrounds, while all students categorized as low-achieving, with the exception of one, relying on a more context-dependent principle when working with CRISS, came from lower socio-economic backgrounds. Similar tendencies are also described in other research (Hasan, 2005; Bernstein, 2000; Chouliaraki, 1998; Cooper & Dunne, 2000). In relating to discourse analysis, the various practices may be described as different genres and discourses of learning strategies: with one discourse related to higher socio-economic backgrounds describing a context-independent genre, and another discourse related to lower socio-economic backgrounds describing a context-dependent genre

(cf. 2.6.1 about orientation to meaning). In the school context, it appears that the context-independent genre is favoured.

If the material described in this project is relevant to the focus on learning strategies in general, learning strategies may not be “designed for all learners”, but rather might favour some backgrounds more than others. This can be explained by the fact that the CRISS project does not question knowledge *per se* in school and how this knowledge relates to power. When the CRISS principles/strategies in classroom practice are treated as neutral, context-independent knowledge, they may only reproduce already existing inequities. To challenge the present inequities, learning strategies have to generally engage in and be related to a critical discussion on what qualifies as legitimate (and thereby strategic, high-achieving) communication, and what qualifies as illegitimate (and thereby non-strategic, low-achieving) communication in school, and how this favours or disfavors certain groups. If this is not done, the CRISS project or the focus on learning strategies may only serve to deflect our attention from inequity and how this is reproduced in the ways through which power and control can be profoundly entrenched within school culture.

2.3.2 Summary of Equity Discourses in Light of the Pedagogic Device

Throughout the described studies, I have investigated the Pedagogic Device as it relates to the equity discourse in Norway. I have demonstrated that the OECD has a rather strong influence on the socialist-alliance governments’ approach to equity. In many respects, the Norwegian government appears to have a conservative modernization approach to education, exercising strong control over its citizens, regardless of age or arena, to improve the equity situation. Education is therefore regarded as the key to improving equity in democracy, though to manage the TPS, an individual needs to be trainable.

One way of recontextualizing the described equity orientation is to implement the teaching of learning strategies. However, the various orientations of teachers to the pedagogic text of the CRISS project demonstrate that there may be a dispute over the meaning of this text as it relates to different social groups within the PRF (cf. 2.2.2). Thus, the distributive rules are not only transformed but also fragmented in the field of recontextualization.

Based on the study of whether students are evaluated as high-achieving or low-achieving when working with CRISS, and how this may relate to their socio-economic background as it concerns the field of reproduction, I demonstrate that the CRISS project may not improve the equity situation. I can say this as there is a qualitative difference in how high- and low-achieving students tend to interpret the strategies in different genres/discourses and in how students selected as high-achieving tend to come from a higher socio-economic background, as opposed to those selected as low-achieving. As a result, *who* may be trainable individuals in the TPS may still depend on whether and how the background of the student relates to the schools' culture. Due to the lack of cultural recognition, it is also possible that students from underprivileged social backgrounds may resist and do the opposite of what the state intends, which may be found in the material from students' interpretations, although this has not been specifically investigated in this context.

Consequently, I claim that equity in education may not be improved unless specific attention is paid to how power and control is profoundly entrenched in the knowledge and pedagogy of schools.

2.3.3 Main Thesis Question

In the described studies, I have analyzed equity in the perspective of the Pedagogic Device as it pertains to education in Norway, where the focus has been on a relational analysis of equity orientations and learning strategies from a power perspective.

To summarize, the papers address the main thesis question as presented in the introduction:

How can the relationship between current discourses on equity and learning strategies be interpreted from a power perspective through principles of contextualization and recontextualization?

The analysis which responds to this thesis question is based on specific ontological claims (Fairclough & Chouliaraki, 1999). Although the model of the Pedagogic Device may seem to be deterministic, I will now point out areas in the device where there might be room for agency.

2.3.4 Ontological Claims of the Pedagogic Device

Discourse is not only reproductive; it also has the power to transform (Fairclough & Wodak, 1997). This agrees with Bernstein's Pedagogic Device, as this theory is about how culture is produced, transformed or reproduced. Bernstein's ontological position can be interpreted in a number of ways. Atkinson (1995, p. 91) finds Bernstein to be a structuralist, as his goal is to theorize the reproduction of social forms:

The theory of codes provides the link between different analytic and institutional levels: between social class, family, and education; between modes of organization, power and control; between discourse, identity, and consciousness. For codes do not merely regulate language or curricula, but replicate social identities.

This sees the subject as placed in discursive practices in which the use of language is essential. The main ontological assertion is that inequities in school are based on class and have their origin in the orientation the classes have to meaning through language (cf. 2.6.1 and paper 5) and in how these are or are not mirrored in school. The different orientations to meaning are based on the individuals' position in the production field. Since school culture is based on different dominant groups' orientations to meaning, the educational system may have less opportunity to improve equity in society. The struggle over content and pedagogy is regarded first and foremost as a struggle between dominant social groups (cf. new and old middle class), and here lies the structural orientation of Bernstein's theories.

However, although there is a continuity of social structures, at the same time, education has the possibility to contest and challenge authority at the macro level, as is described through the school's relative autonomy (cf. Apple, 2002) and when discussing the effectiveness of the device: "Although the device is there to control the unthinkable it makes the possibility of the unthinkable available. Therefore, internal to the device is its own paradox: it cannot control what it has set up to control" (Bernstein, 2000, p. 38). In relation to this project, this can be exemplified through how we do *not* think of equity today. In my analysis, I have sought to make the unthinkable available by constructing contrasting models of equity (*equity through equality* and *equity through diversity*, Solstad, 1997), and by demonstrating both what is and is *not* chosen by the OECD and the Norwegian government as a beneficial way of improving equity (see papers 2 and 3).

The second limitation of the Pedagogic Device's effectiveness is related to power struggles instigated by those who want to appropriate it. This means that although the dominating power has defined what should be focused on in schools to improve equity, this may be contested in different ways by both teachers and students. To find an example of this in this project, I analyze how discourses on equity at the macro level are appropriated into pedagogic practice, demonstrating that both teachers and students respond quite differently when working on the same material. Thus, there are limitations within the device on working in a deterministic manner (cf. articles 4 and 5).

The next question is then to ask whether there is a struggle between different dominant social groups, while the underprivileged tend to be the same no matter what form of knowledge or pedagogy. Bernstein has no clear answer for this. When it comes to the arenas for the struggle and the opposition pointed out by Bernstein, culture and power relations are not static but in transformation. Bernstein's theories may therefore be positioned as what Fairclough and Chouliaraki (1999) describe as *constructivist structuralism*. There is room for agency within the structures, and culture is not only reproduced but also produced and transformed (cf. Pedagogic Device). Nevertheless, "...the thesis does not directly address issues of creativity, autonomy, agency as such, *but* directly addresses how the realisations of creativity, autonomy, agency vary within pedagogic modalities ..." (Bernstein, 2000, p 206). In other words, the theory does not provide a theoretical basis for being normative for different orientations on equity. Based on this theoretical approach, the main intention of this study is not to be normative, but rather to analyze different orientations used in the practice of equitable education, described as different modalities and how these may respond to different interests.

From describing how discourse contributes to constituting society and culture, we now move over to the fourth characteristic of CDA, which describes how ideology works through discourse.

2.4 Discourse Does Ideological Work

Ideologies are defined by Fairclough and Wodak (1997, p. 275) as “... particular ways of representing and constructing society which reproduce unequal relations of power, relations of domination and exploitation”. To determine whether a discursive event does ideological work, one needs to investigate how texts are interpreted and received and their possible social effects. In my study, I move the project from the macro to the micro level, investigating relationships between these two levels from a power perspective. When Bernstein (2000, p. 32) examines transformations of discourse from the macro to the micro level, he regards ideology as the main agent in this transformation:

As the discourse moves from its original site to its new positioning as pedagogic discourse, a transformation takes place. The transformation takes place because every time a discourse moves from one position to another, there is a space in which ideology can play. No discourse ever moves without ideology at play.

Bearing this in mind, by comparing the different orientations to equity, ideological struggles may surface. As the discourse is transformed, the initial ideological orientation may change or be counteracted at the lower levels. This can be examined, as I do in this thesis, by carrying out a relational and comparative analysis of the various arenas where power and social background have importance when examining the social effects of the ideologies.

The fifth element of CDA examines the title word of the thesis: contextualization.

2.5 Discourse Is Historical

Discourse acts and reacts in a historical context, builds on earlier discourses, appropriates them to the present and acts towards the future. In describing current history, the globalization of education is important (cf. introduction). There is a clear relationship between the OECD thematic review on equity for Norway and White Paper no. 16 because the white paper has many references to the thematic review. In this manner, *history as a linear conception of time* is present in this specific contextualization.

However, linear time is not a connection between all data material that has been analyzed. Apart from the direct link between the OECD thematic review and the Norwegian white paper

just mentioned, other analyzed documents and the practices of the learning strategies represent ways of thinking and working on equity *now*, rather than as specific points on a timeline reacting to each other. Therefore, I point out that *discourse as a reaction to past discourses* is only partially treated in this context, while more attention is given to how contemporary elements may be related, i.e. a relational analysis (cf. Apple, 2004). All in all, the papers represent *contextualizations* (cf. title) of each other: while one paper is placed in the foreground, the others form a contemporary history for all of them. “In other words, to understand what is going on in discourse, we need to construct it as an instance of, or as part of many other forms of action at several levels of social and political analysis” (Van Dijk, 2001, p. 116).

Therefore, how the Norwegian government addresses equity and how equity is addressed in the classroom has to be understood in a broader context. Van Dijk (2001) separates between global and local contexts, where “[g]lobal contexts are defined by the social, political, cultural and historical structures in which a communicative event takes place. In CDA, they often form the ultimate explanatory and critical rationale of discourse and its analysis” (p. 108). That is, in this context and as described in the introduction, national educational policies must be analyzed and understood as part of a wider discourse on education reaching across borders, as well as part of the current political situation of the country in question. Key elements in this are also the educational trends penetrating many borders, where neo-liberalism and conservative modernization are main players. This is not only discussed by referring to other authors, but specifically examined in papers 1 and 2.

Local contexts, on the other hand, are defined “in terms of properties of the immediate, the interactional situation in which a communicative event takes place” (Van Dijk, 2001, p. 108). These can have many forms, as in this thesis: research reports, policy documents, and teacher and student practices in school. The local contexts constrain the properties of text and talk: “That is, what we say and how we say it depends on who is speaking to whom, when and where, and with what purposes” (Van Dijk, 2001, p. 108). In other words, the different local contexts are characterized by different genres or discourses (as described above). We will see that in the classroom research in papers 4 and 5, the practices of the learning strategy project have major differences. However, there are “right” and “wrong” ways of interpreting them, as is described by the practices from low-performing students in paper 5. In other words, how you interpret the learning strategy project is not insignificant. References to the context can

serve to explain why some interpretations are “right” and others “wrong”: “context models are the mental representations that control many of the properties of discourse production and understanding, such as genre, topic choice, local meanings, and coherence, on the one hand, but also speech acts, style and rhetoric on the other hand” (Van Dijk, 2001, p. 109). Here, the global context may serve to explain why the focus on learning strategies enters as a new element in Norwegian educational policies, and why equity is addressed in the way it is throughout the policy documents. Furthermore, Bernstein’s theories on how power and control are cemented in the school cultures serve to explain why the “wrong” (i.e. low-achieving) interpretations of the learning strategy project seem to correlate with lower socio-economic status, while “right” (i.e. high-achieving) interpretations seem to correlate with higher socio-economic status.

From describing how each paper represents a contextualization and thereby a “history” of the others, we now move to the sixth main element in CDA: how text and society are linked.

2.6 The Link between Text and Society Is Mediated

One of the goals of CDA is to investigate the connection between social and cultural structures, processes (cf. Pedagogic Device) and properties of text, though these connections are complex and may be more mediated than direct. Therefore, CDA needs a solid linguistic basis. However, there is much variety in how to interpret “linguistic” and what to focus on in research. Van Dijk (2001) wants diversity in CDA, and argues:

explicit CDA also needs a solid ‘linguistic’ basis, where ‘linguistic’ is understood in a broad ‘structural-functional’ sense. In other words, whatever other dimensions of discourse CDA deals with, CDA as a specific form and practice of discourse analysis obviously always needs to account for at least some of the detailed structures, strategies and functions of text and talk, including grammatical, pragmatic, interactional, stylistic, rhetorical, semiotic, narrative or similar forms of verbal and paraverbal organization of communicative events (Van Dijk, 2001, p. 97).

As described by Van Dijk here, CDA can take multiple forms and focus on a diversity of methods. Furthermore, since any text can be analyzed in numerous ways, there is no such thing as a complete discourse analysis. Rather, the researcher needs to be very selective,

depending on the interests and thesis statements in the study in question.

2.6.1 Meaning in Context

CDA takes the view that any text can be understood in different ways – a text does not uniquely determine a meaning, though there is a limit to what a text can mean: different understandings of the text result from different combinations of the properties of the text and the properties (social positioning, knowledges, values, etc.) of the interpreter (Chouliaraki & Fairclough, 1999, p. 67).

In this thesis, I have chosen to focus on pragmatics, analyzing *meaning* in contexts. In pragmatics, communication is regarded as an intentional action (Svennevig, 2009). Therefore, the communicating *actors* are considered a foundational element, which is the main focus in this thesis: how may different meanings of equity relate to power? Or when building on the students' prior background knowledge: whose background knowledge meets the teachers' expectations? How does the intention to promote equitable trainability, as is done through the CRISS project, respond to inequity problems in school? Who amongst the students responds adequately to the teachers' intentions with learning strategies?

The relationship between language and social class is the basis of Bernstein's theory on how schools reproduce power relationships. In this context, *orientations to meaning* become crucial in analyzing and understanding equity issues in both policies and practices. As described through the two equity genres, the meaning of equity in the two cases relies on respectively new and old middle-class discourses (cf. 2.2.2). The different orientations to meaning do not only relate to how interests may be hidden in different equity genres, but also, for example, to how children in a school context interpret the same situation differently, as is focused on in paper 5. Bernstein (2000) and Hasan (2005) claim that working-class children tend to depend on context-dependent principles, while middle-class children tend to depend on context-independent principles.⁹ In schools, middle-class orientations to language dominate. Seeing various students' work with CRISS and examining how different

⁹ In his Code Theory, Bernstein describes how "the outside becomes the inside and how the inside reveals itself" (Hasan, 2005, p. 25). However, as Hasan also points out, Bernstein did not mean that social subjects were seen as puppet-like or that orientations to meaning could not change. This is important to keep in mind when reading paper 5, where I focus on the students' orientation to meaning. It may also be the case that in other contexts, the orientations to meaning could be described differently.

interpretations may relate to social background can indicate possible social effects of the attempts to improve equity (cf. paper 3).

I will now move on to describe how discourse analysis is interpretative and explanatory.

2.7 Discourse Analysis is Interpretative and Explanatory

Discourses can be interpreted in different ways. Within the context of conducting a critical discourse analysis, my interpretation as a researcher will be different from interpretations of a general audience: “This marks the point where critical readings differ from reading by an uncritical audience: they differ in their systematic approach to inherent meanings, they rely on scientific procedures, and they naturally and necessarily require self-reflection of the researchers themselves” (Fairclough & Wodak, 1997, p. 279).

I will now describe the outline of the thesis, looking at the choice of material and how interpretations of the material are coloured by my specific glasses. I argue that these elements cannot be separated, but form part of a specific logical approach to how the five papers are interconnected and form an explanatory context for each other. After introducing the process, choice of material and how this is interpreted, I will critically reflect on my research design and methods.

2.7.1 Design/Process of the Study

The Pedagogic Device has, as previously stated, been the guiding principle for the design of this study. However, this model did not come to mind at an early stage. I started with research on learning strategies, entering the field with an overall need to understand what was taking place. This does not mean that I had no preconceived ideas. I wondered how this was accomplished in relation to students who were struggling with their education, and how the focus on learning strategies could possibly improve their learning. Since I had participated in the CRISS courses, where the course instructor promised great rewards for the students’ learning, I was curious as to how this would work according to Bernstein’s theories, in which much about the lack of equity in education is discerned from looking at how different orientations to meaning relate to social background. Obviously, the CRISS project, although

integrating the principle “to build on student’s prior background knowledge”, did not question school culture from a power perspective.

As I found the CRISS project could be interpreted in quite different ways by both teachers and students, I started to think about *why* this new element had become part of the educational policies. How could this be understood in a broader context pertaining to equity in education? This was the point where the Pedagogic Device entered the project. Through this model, I could theorize about how the macro and micro fields were related, and how the focus on CRISS could be a recontextualization of something else. As I was concerned with underprivileged students in education, I wanted to investigate the relationship between the focus on learning strategies and equity orientation in educational policies.

Bernstein’s glasses have been the key to understanding design, reading the data material, and explaining both the results and interconnectivity of the five papers. However, as I will now explain, I maintain that the results do not “force data into theory”, but rather that theory serves as an analytic tool, with an open result.

2.7.2 Reading of the Data Material

In paper 1: *OECD for a Conservative Modernization of Education?*, I undertake a critical reading of the OECD report: “School Accountability, Autonomy, Choice and the Equity of Student Achievement: International Evidence from PISA 2003” (Schütz et al., 2007). This report presents general recommendations for improving equity based on research from PISA results in relation to social background. The authors present a rather strong conclusion: “The main empirical result is that rather than harming disadvantaged students, accountability, autonomy and choice appear to be tides that lift all boats” (Schütz et al., 2007, p. 4). The three elements investigated in relation to equity form important principles in the conservative modernization described by Apple (2006). Knowing that the concept of equity is important to conquer to gain political terrain (as discussed above) I undertake a critical reading of the evidence presented for this strong conclusion. I question the reading of the presented results, the operationalization of the most important words in relation to equity, the problems related to context-independent research, and finally, the strong presence of political interests in the

research document, as I find the authors are trying to combine a research genre with a political genre.

In this critical reading, my own voice is front and centre, as I question the report through my own specific glasses, based on the knowledge I possess on the issue discussed. Parts of these glasses may not be as explicit as I would like them to be (for example, how I read the operationalization of the key words through Solstad's equity models (1997)) due to space limitations. However, as I critically examine the report, I provide the reader with references that support my claims and questions, allowing him or her to question my opinions by going to the sources.

In paper 2: *A Comparative Analysis of Equity Models in OECD Country Notes*, and paper 3: *Equity in School and Lifelong Learning? – an Analysis of Equity Models in White Paper no.16 (2006/2007) of Norway*, I read the OECD thematic reviews on equity for Spain (Teese, Aasen, Field & Pont, 2006) and Norway (Mortimore, Field & Pont, 2004), and White Paper no. 16 using Bernstein's analytical tools of *classification* and *framing* combined with Solstad's equity models *equity through equality* and *equity through diversity* (1997). The two equity models describe opposite orientations, which may be a good way of describing an order of discourse in which the two are specified as different genres and discourses.

By combining the equity models with classification and framing, I expand Solstad's models to include perspectives of power (classification) and control (framing) in a Bernsteinian sense. Solstad's equity models are as already mentioned referred to in Bernstein (2000), but not specifically discussed in relation to his theory. I therefore aim to build a bridge between the two, expanding both Solstad's equity models, and how Bernstein's modalities may relate to different orientations to equity, thus providing a contribution to both theories.

How I *interpret* the data material from these three policy documents in terms of equity models is presented through networks. My goal is to build a bridge between two languages of description, the analytical tools (Language 1) and the data material (Language 2). "A language of description constructs what is to count as an empirical referent, how such referents relate to each other to produce a specific text and translate these referential relations into theoretical objects or potential theoretical objects" (Bernstein, 2000, p. 133).

As stated, the analytical tools of classification and framing are important in analyzing documents. Although these tools are explicit to some degree, they can be interpreted and used in an analysis involving quite different material, as they can be used to describe the relationship of power (classification) and ways to control (framing), in principle on any aspect (i.e. Bernstein is not only useful for describing education). There is much room for interpretation within the categories. As Bernstein states, an important goal is to be as transparent and explicit in research as possible. This is due to the interpretative aspect in research, and the need to reveal to the reader how you read the material (cf. Bernstein, 2000; Chouliaraki & Fairclough, 1999).

The manner in which I have attempted to solve this in the three policy documents in paper 2 and 3 is by citing the recommendations for improving equity in the text, and thereby providing the raw data for the reader. Furthermore, I have chosen to present each recommendation, not omitting any of them from the analysis, which means the material can be described in its entirety. This has also created some problems, as some of the recommendations could be interpreted in various ways. Consequently, some of the recommendations from the policy documents come under more than one category. Nevertheless, as I explain this and demonstrate my interpretations, I claim that it is possible for the reader to question my analysis. My goal has been to be as open as possible about my glasses, about how I translate the theory onto the material and material onto the theory in my search for a “dialogue” between the two. Since the process is continually evolving, it is not data driven *or* theory driven, but *both*.

In paper 4: *Recontextualizations of Educational Policies: Background Knowledge in Teaching and Learning*, I pay specific attention to how 14 teachers interpret the principle “to build on the student’s prior background knowledge” in their teaching (based on observations and interviews). I also employ the categories of classification and framing. In this paper, I have been much more selective in how I analyze and what I present. I started out by generally speculating about what was happening, and I then analyzed each practice in great detail. As I was constantly comparing the material (for further description, see paper 4 and Glaser, 1992), I found it too complex to examine every aspect of the teaching. Therefore, I chose to focus on what I considered to be the most important elements when talking about how teachers interpreted the use of prior knowledge in relation to equity: the classification between school and everyday knowledge and the evaluation rules, as together these two elements are

important when attempting to analyze power and control within the practice of this principle (cf. paper 4).

This has the same importance as in the former analysis I described. I interpret the practices of the principle (language 2), using glasses to examine how power and control may be entrenched in practices through the principles of classification and framing (language 1). Here, as in the policy analysis, I aim to be as explicit as possible about how I interpret and build a bridge between the languages. This is done by describing different orientations in the practice of the principle, providing specific examples for the reader.

In paper 5: *Recontextualizations of Trainability: Learning Strategies and Social Background*, I compare interpretations of the CRISS project according to how teachers selected high-achieving and low-achieving students. I further investigate the social background of the high- and low-achieving students.

The material in this paper is based on observations and interviews with teachers and students and their work. Some of the data material focuses on specific students, while other data material examines general tendencies as described by the teachers. As the material is rather complex, my goal in this article is to describe the material as a whole. The material is presented as descriptions of what characterizes high- and low-achieving students' work and learning when working with CRISS, and what characterizes the students' social background. As I argue in the paper, this research cannot be generalized, but rather serves as an initial exploration leading to hypotheses on how students work with CRISS, which may qualitatively differ depending on the students' social background. I find this focus to be of great importance since the social basis of CRISS is not discussed or questioned by the author, which is also the same for learning strategies as a research field. One important aspect is thus to follow up this research using a tighter methodological approach.

The material here is read by putting on Bernstein's glasses, where the concept of *orientation to meaning* is important for interpreting and explaining the different characteristics of high and low-achieving students' work with learning strategies and their relation to social background.

2.7.3 Self-reflection

Now that I have described how I have read the material, it becomes clear that Bernstein has been the foundation for the design, development and reading of the data. This may lead to the question of whether the researcher finds only what he or she wants to find, pursuing a type of theoretical imperialism. In response to this concern, I argue that this may not be the only interpretation of the text, but as I clearly anchor my position on the theories, demonstrating how I read them, as well as on the interest of my research, my interpretation can be debated. I cite Fairclough and Chouliaraki (1999, p. 7):

First, that all analysts are operating in theoretical practices whose concerns are different from the practical concerns of people as participants, and all analysis brings the analysts' theoretical preoccupations – and categories – to bear on the discourse.

Second, that the analysts' theoretical preoccupations determine not only what data is selected for analysis but also how it is perceived.

I also maintain that by putting on specific glasses, I can distance myself both from the material and my own assumptions (cf. Jørgensen & Phillips, 1999). Reading the data on the basis of the theory is, in other words, a way of forcing my assumptions out of the picture.

I point out that this project has been neither a deductive nor an inductive process, but has rather involved much movement back and forth between data and theories. I also want to point out that I have aimed to maintain a highly detailed level of description to provide the reader with as much “raw data” as possible within the space available, so my interpretations could be questioned or read differently, both through Bernstein's glasses or other theoretical approaches.

Another argument I want to mention to demonstrate that I am not forcing my theories on the data is the fact that I do not wish to employ all of Bernstein's theories, but instead have chosen what I have found to be useful in relation to my data. I have selected what I have considered especially relevant for my purposes. I did not have complete knowledge on Bernstein's theories before I started this project and searched for knowledge to support my data. However, I was struck by the detail and complexity of Bernstein's theories, much of which I found to be very useful. I am not using, nor is it my goal to promote or question his

complete theory, but rather to use it as an analytical tool in helping to explain the complexities I am presenting in this thesis.

I would also like to add that the *comparative approach*, which is of great importance throughout these papers (with the exception of paper 1), also provides important information to the reader about my interpretations. For example, the classification and framing categories are not closed as such. As they can be used according to whether they are external or internal, strong or weak, they carry a great potential to describe empirical material. By comparing elements, it can be demonstrated that what is being interpreted is stronger or weaker classified and framed and so on. Therefore, the descriptive language is quite detailed and explicit starting at the lowest level. I hope this helps to maintain openness in how I interpret the material in relation to other parts of Bernstein's theories, i.e. further abstractions of the material. To express this in another way, the classification and framing provide an *interpretative* language for describing the raw data, while an *explanation* of the material needs to be undertaken at a higher level of abstraction.

The way I have presented the material may give the impression that I completed one paper before going on to the next. As I have worked through the data material, new questions have arisen about the other studies, so that the analyses of the various studies have influenced each other, not so much in the main analysis, which includes the classification and framing, but in the explanation of the material and the discussion. Although I started at one place, I have continually developed my analysis and discussions, gradually searching for the interconnectivity between them.

I will now move on to the last element which describes CDA.

2.8 Discourse Is a Form of Social Action

Discourse analysis addresses how word play can be based on power relationships, and pays specific attention to underprivileged groups. This study is aimed at analyzing power relations within the equity orientations in educational policies and how this relates to the specific practices of learning strategies. This represents the *critical* elements of discourse analysis.

Through this, I have searched for an understanding of why learning strategies have entered the school arena as “new knowledge”, i.e. searching for intention and meaning.

However, due to its theoretical focus, this study does not aim to be normative (cf. Bernstein above), but in light of the Pedagogic Device attempts to provide knowledge on how power relations may form discursive aspects of equity and learning strategies and how these aspects relate to each other. Through principles of contextualization and recontextualization it examines processes of cultural production, transformation and reproduction. In this, an attempt is made to analyze the link between discourse and society.

It is this permanent bottom-up and top-down linkage of discourse and interaction with societal structures that forms one of the most typical characteristics of CDA. Discourse analysis is thus at the same time cognitive, social and political analysis, but focuses rather on the role discourses play, both locally and globally, in society and its structures (Van Dijk, 2001, p. 118).

Hopefully, the relational analysis between equity discourses and learning strategies will help to reveal how the current historical approach to solving inequity problems might fail due to the lack of recognition of how power and control are cemented in school in very profound ways. Through the papers I hope to demonstrate that there is a need to analyse and reflect on students' failure in school through a broader and more critical lens, not reducing these complex issues to technicalities (see also Siegel & Fernandez, 2000; Bernstein, 2000; Hasan, 1995; Ares, 2007) as is done in the CRISS project. For further work on the school's role in improving equity, I claim specific and explicit attention must be directed towards the origin of the inequities. The question *What would it mean to open up schools for voices traditionally not heard in school* would have to be discussed in more critical relation to meaning, forms of realisation and context. Studying the relationship between the school's orientation to meaning and the student's orientation to meaning must be central to ensuring equity in lifelong learning.

PART 2: ANALYZING EQUITY IN THE PERSPECTIVE OF THE PEDAGOGIC DEVICE

1. Analyzing Distributive Rules

Paper 1: OECD for a Conservative Modernization of Education?

A Norwegian version has been accepted for publication in: Elstad, E. & Sivesind, K. (eds.) (2009): *PISA: Visjoner og Diskusjoner* [*PISA: Visions and Discussions*, in Norwegian]. Oslo: Universitetsforlaget. To be published in the autumn of 2009.

Abstract

An important issue in the current debate on educational policies is the question of equity. This paper focuses on how equity is addressed by the OECD in a report entitled: “School Accountability, Autonomy, Choice and the Equity of Student Achievement: International Evidence from PISA 2003” (Schütz, West & Wössmann, 2007). In the paper, the author undertakes a critical reading of the evidence presented for the OECD report’s strong conclusion: “The main empirical result is that rather than harming disadvantaged students, accountability, autonomy and choice appear to be tides that lift all boats” (Schütz et al., 2007, p. 4).

The author finds this conclusion to be highly questionable, due to a tendentious reading of the results, a problematic operationalization of the key words, a low degree of context-sensitivity, and the lack of explicit theorization and an explicit political anchoring in the research. Furthermore, as the OECD report is characterized by a hybridization of a research genre and a political genre, the author questions whether the OECD report is disguising political interests in the name of both research and equity, thus promoting conservative modernization in education.

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Paper 2: A Comparative Analysis of Equity Models in OECD Country Notes

Abstract

This paper undertakes a comparative study of the OECD's thematic reviews on "equity in education" for Spain and Norway. The author aims to investigate whether there may be a similar orientation to equity expressed in the two reviews, and to discuss how social stratification may occur within the recommendations to improve equity. The author claims that special attention should be paid to how "multiculturalism" is combined with "national measurements of key performance indicators", and how the "objective" definition of schools as good or bad through national testing may affect the demography of the schools. Targeting the inequity that may arise through a conservative modernisation, the author finds that it is important to employ an expanded concept of "educational policy".

Keywords: OECD, Equity models, Spain, Norway, Power relations.

Introduction

Equity is a key goal in Norway, the European Union (EU) and the OECD. However, there are different orientations that could be employed in approaching the concept of equity (Hernes, 1974; Solstad, 1997; Aasen, 2007) leading to different pedagogic and knowledge orientations. Education (and thus concepts of equity) is never neutral (Bernstein, 1977; Apple, 2006) but it is an important arena in which various actors in society can jockey for position. Apple et al. (2005) claim that to understand current national educational policies it is important to employ a global analysis, as educational trends reach beyond national borders.

Karlsen (2006) claims that the OECD has played an important role in documenting different aspects of the educational systems of different countries. Its evaluations have often been commissioned by governments in need of a legitimisation of the policy they use (Eide, 1995). Recently, country notes have been published on the theme "equity in education" for five OECD member states: Finland, Hungary, Sweden, Spain and Norway. In this paper, I will conduct a comparative analysis of two of these countries: Spain (Teese, Aasen, Field & Pont,

2006) and Norway (Mortimore, Field & Pont, 2004). Both have relatively strong central governance, but the educational systems are characterised by differences in pedagogic and knowledge orientation which will be analysed below.

It could be argued that undertaking an analysis of educational systems based solely on the OECD reports would be relying too much on one source and thus would limit the analysis. However, I claim it is important to pay specific attention to the OECD reports because of their great influence. Moreover, my interest here is not to critically investigate the analysis of the equity situation in the two countries, but rather to investigate what kinds of solutions are recommended for Norway and Spain. This means that in this analysis I accept the content of the OECD reports, knowing that the reports could be critically examined using other sources. In other words, the important information is related to whether there is a common approach to equity that can be found in the two reports, while I am less interested in the two countries per se. As my purpose is to investigate if there is a common orientation to equity, I find that it is important to undertake comparative research where some differences are present, rather than comparing two countries characterised by similarities, where the findings could be understood as context dependent. Furthermore, as the reports have different authors (two of them are represented in both, while three authors are only represented in one of them), potentially there will be different recommendations as to what will likely improve equity, or are similar orientations expressed?

I will relate the analysis to two models of equity: "equity through equality" and "equity through diversity" (Solstad, 1997). A description of these will be presented below. Unlike Solstad, who claims that the first will reproduce inequalities, while the latter will likely reduce inequalities, I will employ perspectives from educational sociology on both models. In this relation I find the theories of Bernstein (1977) helpful. In order to locate power, I will relate the analysis to current educational trends, where Apple's (2006) concept "conservative modernisation" is important. Bearing this in mind, I will also discuss if the recommendations given for a more equitable education system can also constitute the grounds for the strategic reproduction of power.

To summarise: the following questions will be focused:

1. How do the pedagogic and knowledge recommendations for creating a more equitable educational system in the OECD reports relate to the models: “equity through equality” and “equity through diversity”?
2. How do the recommendations relate to the educational trend: “conservative modernisation”?
3. In what ways do the OECD recommendations for equitable education allude to or reinforce social stratification in the two countries?

First, I will describe the educational systems of Spain and Norway *as presented in the OECD reports*, followed by theoretical and methodological approaches for analysing the equity models, and follow this with a discussion of their relation to power and social stratification.

The Spanish and the Norwegian education systems

The Spanish and Norwegian education systems are according to the OECD reports characterised by both similarities and differences. The pre-school education in the two countries is very different. While Spain has a free pre-school education for children between 3 and 5 years of age (79-97 % attend depending on the age group), in Norway parents pay for day care, focusing on care and education of children from 1 to 5 years of age (45% attend).

Both Spain and Norway offer compulsory education for the 6-16 age group. However, Spain has a stricter and performance-based system: described by the OECD report as a system with a hierarchy of hard and soft subjects. There are records on pupil assessment, results and progression decisions, promotion is based on satisfactory attainment of programme objectives in the core curriculum (10% repeat a year) and pupils need to pass all subjects the final year to be awarded their certificate (*Graduado*). If they fail, they are given access to Social Guarantee Programmes to improve their basic skills and prepare for work.

Norway has a more open compulsory education system where pupil performance plays less of a role. All pupils progress, and all have a right to upper secondary education. It is impossible to fail, as all grades have passed achievements. However, where there is competition for places, entrance to programmes in upper secondary education is based on grades achieved.

In both Spain and Norway, upper secondary education is divided into academic programmes and vocational training. However, the Spanish system is more strictly classified than the Norwegian system. In Spain, pupils awarded the school leaving certificate (*Graduado*) can attempt to obtain their *Bachillerato* (baccalaureate) over two years. The *Bachillerato* consists of common-core and specialization subjects. In addition, pupils awarded the *Graduado* can also choose vocational training. Holders of the *Bachillerato* are entitled to enter a number of tertiary programmes. However, entrance into higher education is based on control by the national university entrance examination, and when there is great demand for courses pupils can be left out.

In Norway, pupils are guaranteed by law the right to upper secondary education of three (general studies) or four years (vocational qualification). While the general studies lead to higher education, the vocational qualifications can be upgraded to also lead to higher education by taking some supplementary subjects. Entrance to higher education can also be based on five years of work or a combination of work and upper secondary subjects. This is done to ensure there are no dead ends in the system.

In both Spain and Norway, the state is responsible for basic minimum programme standards in the educational systems by providing a general curriculum and goals. The municipalities in both countries are responsible for the compulsory education (6-16 years) based on the frames set by the state. Spain has a rather high private school attendance (25.5% subsidised private schools, 7.1% unsubsidised) compared to Norway (1.7% in subsidised private schools, 1% in special schools).

In Norway, the budgetary framework is set by the state, while in Spain education expenditures are dependent on the regulations from the autonomous communities. All in all, Spain spends less than the OECD average on education (Teese et al., 2006), while Norway has the second highest expenditure rate in the OECD (Mortimore et al., 2004).

When it comes to the description of knowledge and pedagogy (teaching), the two countries differ to a high degree. As described in the reports, Spain has a very traditional system, emphasising direct teacher instruction, strong subject orientation and a low degree of pupil differentiation; all pupils are presented the same material and for the most part they work individually (Teese et al., 2006). Norway has a strong focus on adapted teaching (although

this does not function satisfactorily according to the OECD), with more project/group work and less subject orientation in the system (Mortimore et al., 2004).

However, there is no doubt that the current educational system in Spain tends to have a better equitable function than the Norwegian system, according to the PISA study of evaluated performance: "Spain scores high on equity as measured by PISA results" (p. 42), while in Norway "... there is a bigger than average dispersion of scores despite the high level of equity within the system" (Mortimore et al., 2004, p. 5) and "there remains a worryingly long chain of underachievers ..." (p.57). But even though Spain scores high on equity measures, it is stated in the report that the "PISA results indicate, on the contrary, that equity in Spain has been achieved with comparatively low levels of quality" (Teese et al., 2006, p. 45). Norway is found to have a very good system, and when a longer time perspective is used, the equity situation in Norway improves considerably, as indicated in the measurements for adult literacy.

Despite differences in equitable functions, the losers in both educational systems tend to be the same: pupils from lower socio-economic backgrounds and ethnic minorities. "It is likely that those pupils whose parents have enjoyed only limited schooling and other vulnerable children (in terms of their low socio-economic status, potential special needs and in some cases ethnic and language background) make up the tail of underachievement" (Mortimore et al., 2004, p. 52).

In the Spanish country note, while the focus is similar, the question is raised as to whether ethnicity is the real problem when it comes to challenges to equity: "The integration of migrants in the education system in Spain is a recent phenomenon which is challenging the education system as a whole, although some say that it is rather overstated and the focus is rather on the fact that most immigrants with difficulties are those from low socio-economic backgrounds" (Teese et al., 2006, p. 5).

The theoretical approach I employ for this study is specifically concerned with this: how education reproduces socio-economic based power relations and disfavours the already disadvantaged in society through its knowledge and teaching orientations, which I will analyse through the specific recommendations outlined in the two OECD reports.

Theoretical framework: Basil Bernstein's Code Theory

Bernstein's theories demonstrate how power and control are spread in society from the dominant classes via formal education, and in the way the content is classified and interactions are framed (Bernstein, 1977). The principles of this classification and framing are derived from the meaning structure of dominant classes and applied to all children in the educational system. This means that selected principles will have their power and control located in specific social classes, or sections thereof, and will then be applied to all other classes. These concepts were not only designed for the study of specific transmission in the classroom, but were useful in understanding the organisation of school, as well as the relationships between macro-actors in society (Haavelsrud, 2001). Selected principles were seen as fundamental in relaying the domination of middle-class values over working-class values. The theories can be studied in the context of power and control at all levels of analysis, including the policy level, where certain principles are included and others excluded. It is at this level I will undertake the analysis, studying the OECD equity reports on Spain and Norway. Through the analysis of the reports I will attempt to describe how the recommendations given relate to content and pedagogy, and thereby models of equity.

Tools of Analysis: Classification and Framing

In the analysis of the documents, the terms classification and framing will be employed. 'Classification' describes power relations and the transmission of power. The stronger the classification the more isolated the categories are from each other, without contact, as for instance between the school system and the production system (Haavelsrud, 2001). In the case of a weak classification, the two categories would interact and take each other into account. The recommendations in the OECD reports will be analysed in relation to the following four classification elements:

1. Extra-discourse relations of education. Educational discourse may be strongly or weakly insulated from non-educational discourse.
2. Intra-discourse relations of education. Organisational contexts:
 - a) Insulation between agents and insulation between discourses. Agents and discourses are specialised to departments which are strongly insulated from each other.
 - b) Insulation between discourses but not agents. Here agents and discourses are not specialised to departments but share a common organisational context.

3. Transmission context. Educational discourses within and/or between vocational and academic contexts may be strongly or weakly insulated from each other.
4. System context. Education may be wholly subordinate to the agencies of the State, or it may be accorded a relatively autonomous space with respect to discursive areas and practices (Bernstein, 1990, p. 27).

The concept of "framing" describes relations of control and is thus a key to the study of the relations between, for example, pupil and teacher, home and school, or work and school. In the case of teacher-pupil relations in communication on a subject, important choices are made about the following (Bernstein, 2000, p 12):

- selection of what is to be communicated
- the sequence of the what that is to be communicated (what comes first, what comes next)
- the pacing, or expected acquisition
- the criteria for evaluation
- the control over the social base which makes the communication possible

Framing can be described as "internal" or "external". Internal framing refers to the apparent influence the pupil will have over the teaching. In the case of participatory and problem-centred teaching/learning, the framing would be weak (-F), as the teacher may choose to listen to pupil preferences. In the case of more traditional approaches, the framing may be strong (+F) in that the pupil's interests and choices are not taken into account.

External framing "... refers to the controls on communication outside that pedagogic practice entering the pedagogic practice" (Bernstein, 2000, p. 14), for example, the degree to which the state may influence the pedagogic practice through regulations.

I find the classification and framing tools helpful in analysing the complexities in the two equity models: "equity through equality" and "equity through diversity" (Solstad, 1997):

"Equity through equality" and "equity through diversity"

Historically, different concepts of equity have formed educational policies (Hernes, 1974; Solstad, 1997; Aasen, 2008). Solstad, (1997) differentiates between two models of equity through the concepts "equity through equality" and "equity through diversity". In an equity-

through-equality model, the classification (see elements described above) of *extra-discourse relations of education* (for example how school relates to everyday or local contexts) is typically strong (+C), as the content is likely ready-made, while in an equity-through-diversity model, the extra-discourse relations of education are more likely to focus on everyday knowledge or local problems (-C).

The *intra-discourse relations of education* in an equality model are also characterised by strong classification (+C) as there is likely a strong subject orientation and strong teacher autonomy, with a low degree of cooperation. In a diversity model, the intra-discourse relations are likely more weakly classified (-C), as the pupils work on broader topics, crossing subject boundaries.

The *transmission context* in an equality model is also characterised by strong classification (+C), as there is limited and incidental cooperation/interaction with outside school agencies. In a diversity model, there is more focus on professional competence, extensive cooperation and negotiation with agencies at the local community and municipal levels (-C).

The only classification element weaker in an equality model than in a diversity model is the *system context*. In an equality model, the classification is weak (-C), as there is a vertical dependency on the state, and a centralised, pre-specified school. A stronger classification (+C), and thereby more autonomy from the state, is present in a diversity model, as the municipal level or the school is more responsible for how the school is run.

When it comes to *framing*, the equality model is most likely strongly framed (+F), both *internally* (the degree of apparent influence the pupil has over the teaching) and *externally* (the relative autonomy of the teacher from outside regulations). For example, pupils are likely presented the same work methods, same syllabi, same demands and instructional teaching, and teacher autonomy is likely weak, as there is focus on ready-made knowledge presented in national textbooks (+F). The framing in a diversity model is likely weaker (-F) both internally and externally, as there is more focus on the pupils' interests, needs or qualifications, more collective work, and the teacher has more autonomy according to how and what to teach. The regulations from the state will likely be stronger (+F) in an equality model than in a diversity model, where the teacher tends to have more autonomy (-F).

To summarise: an equality model is characterised by strong classification of extra-discourse relations (+C), intra-discourse relations (+C), and transmission context (+C), but weak classification of system context (-C). Both internal and external framing is likely strong (+F). The opposite is true in a diversity model.

However, real educational systems tend to be influenced by both equality and diversity models, although they are based on different rationales and ideologies (Solstad, 1997), as educational space is an arena where different ideological forces can lock horns (Bernstein, 1977; Apple, 1990). The descriptions of the Norwegian and Spanish educational systems in the OECD reports show that Spain may be more oriented towards an equality model through, for example, direct teacher instruction, a low degree of pupil differentiation, and strong state control, while there may be more elements related to a diversity model in the Norwegian educational system, as for example the focus on adaptive learning, project/group work and less focus on assessment.

Before analysing the equity model in the OECD reports on equity for Spain and Norway, I will outline my methodological approach.

Network analysis

I will use network analysis to investigate and demonstrate the analysis in question. Networks can be used to analyse complex connections in the empirical analysis of qualitative data; in this case the OECD reports on the equity of the Spanish and Norwegian systems and how they relate to two different models of equity. The method can be seen as a combination of two traditional ways of presenting qualitative data: 1) reporting the results in a fairly simple category scheme, and 2) letting the data speak for themselves through quotations. A network analysis utilises defined categories, but it tries to work these categories into a place where enough of the individual essence is guarded and represented. The network structures show, for example, what categories are autonomous and what categories are conditional upon others. The network can be seen as a map or an illustration of how key concepts relate to each other¹³.

¹³ (e.g. Bliss, Monk & Ogborn, 1983; Riksaasen, 1999; Haugen, 2002; Haugen, 2005; Paper 3)

In this case I show how I have interpreted and analysed the reports by relating each recommendation given to the two models of equity. I have made two networks, one for the model "equity through equality", and one for "equity through diversity", described by classification and framing values (+/-C, +/-F). The left side represents theory, the right side represents the data material (recommendations), while the dependent concepts build a bridge between them, categorising the recommendations and the theoretical concepts more delicately. Furthermore, key content concepts found in the recommendations are represented in brackets behind the number of the recommendation, while the quotations from the recommendations will be given in the text as I work through the analysis. The analysis illustrates tendencies in the recommendations by both quantifying them and by leaving spaces open so the reader can see what is not recommended. The content is qualitatively analysed by showing the relation between different concepts.

I have placed Norway and Spain side by side in the network. In that way the orientations given to the two countries can be compared fairly easily. Each recommendation is represented by a number. These numbers are identical with the numbers of the recommendations in the OECD reports (Mortimore, et al., 2004; Teese et al., 2006). Due to limitations of space, I do not provide a full citation of all recommendations. However, through the numbers on the recommendations, the reader has an opportunity to examine what I have left out.

Spain has received 23 recommendations, while Norway has 22. For Norway, recommendation numbers 1-10 "build on strengths", while recommendations 11-22 "address weaknesses"). For Spain, all recommendations address weaknesses.

Some of the recommendations were characterised by different classification and framing values and can therefore be found more than once.

Analysis of equity through equality

Table 1 presents classification characteristics of recommendations related to the "equity-through-equality" model. As described above, the equality model is characterised by strong classification of extra-discourse relations (+C), intra-discourse

relations (+C), and transmission context (+C) and while weak classification of system context (-C).

| Classification | Dependent Concepts | Spain | Norway |
|----------------------------|--------------------|--|---|
| Extra-disc.: (+C) | | | |
| Intra-disc.: (+C) | | | |
| Transmission context: (+C) | | | |
| System context: (-C) | Rules/frames | 21 (national progress on key performance indicators) | 8 (cautious reform implementation), 15 (develop age-related benchmarks, testing), 16 (added-value measures) |
| | Goal /value | | 17 (devise intervention strategies) |

Table 1: Analysis of classification in “equity through equality” model

Table 1 shows that neither Spain nor Norway is recommended to strengthen the *extra-discourse relations*, the *intra-discourse relations*, or the *transmission context*. However, through the *system context* (subcategories from Aasen, 2007), both countries are recommended to give the state (through *rules/frames*) greater influence/control of educational outcome as measured through tests: “... regional education authorities set goals and improvement targets on key performance indicators with a view to assuring national progress on these measures ” (Spain 21), “the establishment of a research project to consider how age-related subject benchmarks can be developed alongside a new testing programme” (Norway 15), and “support the development of *added-value* measures” (16). Further general interventions are recommended for the Norwegian Education Ministry: “Reforms in basic education should be implemented cautiously, and monitored carefully ...” (Norway 8), and through *goals/values*: “The ministry and municipalities (should) work with the teaching unions to devise a suitable range of intervention strategies” (17). Both Spain and Norway have contradictions according to the influence of the local authorities on this point: regional education authorities should set targets and goals to assure national progress on these measures. How does one regionally decide the national progress goals that are to be measured? For Norway, instead of providing more direct autonomy for teachers or local communities, these authorities should be heard when intervention strategies/reforms are to be worked out.

In a equity through equality model the internal and external framing are strong (+F).
Table 2 shows the framing characteristics of the recommendations related to an equality model.

| Framing | Dependent concepts | Spain | Norway |
|---------------|-------------------------|--|--|
| Internal (+F) | Performance improvement | 21(key performance indicators), 22 (monitoring, strategic improvement), 23 (subgroups, effective targeting) | 14 (raise expectations), 15 (age-related benchmarks, testing) |
| | Social base | | 5 (anti-bullying), 12 (acceptable behaviour) |
| External (+F) | Legal control | | |
| | Financial control | 14 (support for disadvantaged background children), 19 (establish minimum national expenditure level), 20 (supplementary funding disadvantaged communities) | |
| | Information | 1 (multiculturality in teacher education), 5 (development for teaching effectiveness), 6 (sustained teacher training), 8 (renovated teacher education) | 20 (multicultural, special education in teacher education) |
| | Evaluation | 5 (subgroup participation/achievement), 8 (teacher education programmes), 21 (key performance indicators), 22 (strategic improvement), 23 (participation/performance of subgroups) | 8 (reforms), 13 (early learning of disadvantaged pupils), 15 (age- related subject benchmarks, testing), 16 (school website Skoleporten, added-value measures), 19 (light-touch monitoring of schools) |

Table 2: Analysis of framing in “equity through equality” model.

The *internal framing* refers, as mentioned above, to the apparent degree of influence the pupil will have on the teaching. There are three recommendations for Spain that will potentially diminish the pupils’ influence: these are related to *performance improvement*: “... regional education authorities set goals and improvement targets on key performance indicators with a view to assuring national progress on these measures ”(21), “... performance monitoring, evaluation, service aimed at strategic improvement (rather than legal compliance) and specialist services ... (22), and “that monitoring of educational participation and performance recognize the needs of key sub-groups of the population and function to highlight these needs and facilitate effective targeting of

resources and strategies to address them” (23). On the one hand, the last element focuses on the needs of subgroups, on the other hand no explanation is given as to how the needs are defined: are there needs to perform according to national standards, or standards developed from within this group? I have categorised these elements in both equity and diversity models, as they could go both ways.

Similar to Spain, a strengthened internal framing for Norway is also related to performance improvement “... expectations about pupils” intellectual capabilities can be raised” (14), and “... age-related subject benchmarks can be developed alongside a new testing programme”(15). Moreover, two recommendations are related to stronger control of the *social base* by focusing on anti-bullying and acceptable behaviour: “Anti-bullying programmes, research and development should be maintained” (5), and “... draw up local rules for acceptable classroom behaviour”(12).

When it comes to *external framing* (subcategories from Aasen, 2007), relating to what degree outside agencies delimit the autonomy of the teacher, there are 12 recommendations for Spain and six for Norway. For Spain three elements relate to *financial control*, all focusing on incentives to ensure that schools pay attention to pupils from disadvantaged backgrounds: “... offer private schools incentives in the form of higher per capita payments for enrolling children from disadvantaged backgrounds ... (14), “... establishing a minimum national level of per-pupil expenditures on non-university education ... (19)”, and “... supplementary funding for equity programmes ... to ensure a shared high level of commitment to schools serving disadvantaged communities” (20). Financing is not recommended as a controlling tool for Norway.

Both countries are recommended to influence teacher practice through *information*. These are both related to multi-culturality and to general teaching effectiveness: for Spain: “... programme design and delivery to achieve a greater inter-cultural orientation and effectiveness, complemented by support for languages, culture, and religion of origin and by reforms of teacher training” (1), “... improving programme design, and implementing professional development activities for greater teaching effectiveness” (5), “... Spanish education authorities give consideration to the recommendations in the OECD review ...” (6), and “... renovated teacher education

programmes ...” (8). While for Norway: “The time devoted to multicultural, bilingual and special education issues in teacher training should be increased” (21).

Both states should use *evaluations* as a form of control. For Spain, both generally and related to subgroups: “... regional education authorities set goals and improvement targets on key performance indicators with a view to assuring national progress on these measures”(21), “... the role of regional education administrations (should) be refocused on performance monitoring, evaluation, service aimed at strategic improvement (rather than legal compliance) ...” (22), “... monitor differences in baccalaureate participation and achievement on the part of different sub-groups ...” (5), “... evaluation of the effectiveness of these programmes” (8), and, “That monitoring of educational participation and performance recognizes the needs of key sub-groups of the population and functions to highlight these needs and facilitates effective targeting of resources and strategies to address them” (23). Norway is recommended to aim for more general control through evaluations: “Reforms in basic education should be implemented cautiously, and monitored carefully ...” (8), “Research should be undertaken into ways of supporting the early learning of disadvantaged pupils in danger of underachieving” (13), “The establishment of a research project to consider how age-related subject benchmarks can be developed alongside a new testing programme” (15), “The Ministry should ... assess the impact of [*Skoleporten*: website with school data]” ..., “and support the development of *added-value* measures” (16), and “... create an appropriate *‘light-touch’* monitoring procedure of schools” (19).

To summarise the recommendations oriented towards an equity-through-equality model as described by both classification and framing characteristics above: All together, Spain has received 11 (some coded more than once in the table) recommendations, while Norway has 10 recommendations oriented towards an equality model. What is especially interesting for Norway is that 8 of the 10 recommendations address weaknesses in the educational system, while only two are based on strengths. Thereby, Norway is clearly recommended to focus on an equality model to a higher degree. For both Spain and Norway, no recommendations directly address a strengthening classification of the extra-discourse relations, intra-discourse relations or transmission context, but a weaker classification is recommended between state and school, mainly by subjecting key performance targets to measuring/monitoring. However, the key

targets to be measured may affect the classification of the other elements, although this is not specifically addressed.

Regarding the internal framing, the national improvement on key performance indicators/age-related benchmarks, along with the testing programmes, will likely reduce the pupils' apparent control over the teaching.

Recommended tools for guiding the teacher practices as described through external framing are to a high degree oriented towards evaluation for both countries, but for Spain also through financial tools and information. Some of the elements are oriented towards multi-culturality and disadvantaged pupils. It could be argued that these elements belong to a diversity model. However, it is not a given that the monitoring of these groups and a clearer focus on them will lead to a more diverse knowledge and pedagogic orientation (Buras, 2006). It may be the case that these groups will be given more attention to meet the general demands. Therefore, as the reader will see, some of the elements are related both to an equality model and a diversity model. The actual practice of these recommendations will depend on their interpretation and use¹⁴.

¹⁴ In an analysis of how the Norwegian government responds to this OECD report (paper 3), I show that the equality discourse is strongly recommended to improve the inequities related to multiculturalism and disadvantaged pupils.

Analysis of equity through diversity

Table 3 presents classification characteristics of recommendations related to a diversity model, where the opposite classification characteristics are present. All classification elements are weak (-C), with the exception of system context (+C).

| Classification | Dependent Concepts | Spain | Norway |
|---------------------------------|------------------------------|---|--|
| Extra-discourse relations: (-C) | Access | 13 (equity in selection), 14 (enrol disadvantaged pupils), 4 (widen social access to theoretical disciplines) | 3 (non-streamed model), 6 (Lifelong learning), 2 (maintain level of investment), 9 (adults, immigrants), 11 (day care) |
| | Community/home/-school | 10 (enhance home-school relation), 11 (community involvement), 12 (time-release parents), 17 (extracurricular activities) | 16 (school choice) |
| | Content | 1 (intercultural), 2 (vocational modules), 7 (context-sensitive emphasis, adolescents, cultural setting), 16 (meaning through practicality) | 20 (multicultural, special education), 21 (immigrants) |
| Intra-discourse relations: (-C) | Links/no dead ends | 1 (between levels of upper secondary) | 1 (retain non-streamed model), 3 (continue comprehensive, non-streamed schooling), 7 (parity of esteem between general and vocational education) |
| | Progression/transition | 3 (all to advance from ESO), 5 (smoothen transition from ESO), 18 (reduce grade repeat) | |
| | Pupil heterogeneity | 14 (pupil mix in all schools) | 3 (retain non-streamed model) |
| Transmission context: (-C) | Vocational/general education | 2 (vocational modules) | 7 (parity of esteem between general and vocational education) |
| System context: (+C) | Rules/frames | 1 (curriculum flexibility), 2 (optional content), 4 (learning options), 9 (allocate teachers according to local needs), 3 (all access to upper secondary) | 8 (reforms implemented cautiously), 10 (teacher liberty, innovation), 18 (guidelines for school intervention) |
| | Goal/value | 1 (intercultural orientation), 5 (teaching effectiveness for subgroups), 14 (pupil mix), 22 (strategic improvement, rather than legal compliance, autonomy for schools) | 14 (raise expectations) |

Table 3: Analysis of classification in “equity through diversity” model.

A weaker classification is recommended for both countries in relation to their *extra-discourse relations*: for Spain, all together 11, while for Norway seven, where three address weaknesses, four strengths. For Spain, three recommendations are related to

access for disadvantaged pupils in the current educational system: “... formulate equity objectives ...” that “... take into account, on a local basis, the extent to which schools have power to select their students formally or informally...” (13), “... pupil-mix ...” (14), and “... improve student achievement, reducing attrition, and widening social access to theoretical disciplines” (4). Norway is recommended to maintain the system as it is, as the lack of access generally is not a problem: “... non-streamed model of schooling ...” (3), “... lifelong learning ...” (6), “... level of investment in education should be maintained” (2) and, “additional suitable provision should be made for adults (including immigrants) who wish to pursue primary and secondary education courses” (9). However, one weakness is addressed in pre-school education – this is not free in Norway: “... priority should be given to supporting early childhood education ...” (11).

For Spain, one clear concern is related to the lack of relations between school and parents and community. Consequently, a weaker boundary is addressed: “... communication and reporting methods to enhance home-school relations”(10), “... widen the range of cultural activities ... to strengthen community involvement and cohesion and a greater commitment of parents to the cultural growth of their children”(11), “... periodic time-release of parents to visit schools and discuss their children’s needs and progress”(12), and “... widen the range of opportunities in which pupils can experience success and take pride in learning, whether through extra-curricular activities, community involvement or through the arts, sports, leisure and other cultural enrichment activities”(17). This concern is not found in Norway, however, it is recommended that the Ministry “launch discussions with municipalities and other stakeholders on the implications of potential increased demand for school choice” (16). This element is coupled with school evaluations and added-value measures (see –C system context and strong external framing in equality model).

Both countries are recommended to relate the educational content more to specific cultures and contexts: For Spain, four recommendations relate to content: “... curriculum flexibility ... to tackle under-achievement and cultural diversity” (1), “... increasing the optional content of compulsory secondary education ...” (2), “... content of initial teacher education for secondary school ... reviewed ... to ensure a more practical and context-sensitive emphasis, aligned to the developmental needs of adolescents and the cultural setting of schools” (7), and “... differential teaching

approaches in which “meaning through practicality and learning by sharing” is in focus (16). Norway is also recommended to specifically provide a wider cultural content: “The time devoted to multicultural, bilingual and special education issues in teacher training should be increased,”(20), and “The funding methods used to support the needs of immigrants should be reviewed after consultation with ethnic minorities”(21). The recommendations focusing on the *intra-discourse relations* show that Spain is recommended to weaken the boundaries within and between the systems, while the organisation of the Norwegian system is considered to be good, as only strengths are focused on. For Spain, one is related to links/no dead ends “... links between the different levels of upper secondary education so that there are no dead ends ...” (1). Recommendations focusing on this for Norway are: “The basic structure of education systems should be preserved”(1), “The comprehensive, non-streamed model of schooling should be retained” (3), and “Parity of esteem between general and vocational education should be preserved ...” (7).

Further for Spain, three relate to *progression/transition* between the educational systems: “... statutory right to two years of upper secondary education (academic or vocational) by creating a platform of successful learning permitting everyone to advance” (3), “... smoothen transition from ESO, improving programme design, and implementing professional development activities for greater teaching effectiveness”(5), and “... monitor rates of grade-repeating and support research into ‘best practice’ ... to achieve a ... reduction of this practice ...” (18). For Norway there are no recommendations focusing on progression/transition.

Finally, one recommendation can be related to *pupil heterogeneity* for both countries. For Spain, “... co-ordinate educational provision across public and publicly-subsidized schools ... through ‘pacts’ ... in terms of pupil-mix, programmes and activities ...” (14), while for Norway, “The comprehensive, non-streamed model of schooling should be retained” (3).

Related to a weakening of the *transmission context*, for the relation between general and vocational education there is one recommendation for both Spain and Norway. For Spain: “(...) to make fuller use of vocational modules to promote students engagement

in learning” (2), while for Norway, “Parity of esteem between general and vocational education should be preserved ...” (7).

When it comes to the *system context*, i.e. the classification between school and state, there are nine recommendations for Spain, while four for Norway address a stronger classification (i.e. more autonomy for schools). For Spain, four are related to a weakening of the *rules/frames* provided by the state: “... curriculum flexibility...” (1), “... increasing the optional content of compulsory secondary education ...” (2), “... include applied learning options in the baccalaureate ...” (4), “... allocating teachers to schools within a framework of strategic resource management and differential need as identified by schools ..., and ... seek particular teaching strengths to manage their needs” (9), and “... statutory right to two years of upper secondary education (academic or vocational) by creating a platform of successful learning permitting all to advance” (3).

While the recommendations related to rules/frames for Spain are, as shown above, more about autonomy in curriculum, access and local needs, recommendations for Norway focus on general teacher liberty, and giving teachers influence when reforming school and implementing school interventions: “Reforms in basic education should be implemented cautiously ...”(8), “The scope for innovation should be preserved and enhanced, particularly where it may improve equity” (10), and “The local government associations and the teachers unions write guidelines to deal with school interventions”(18).

Furthermore, there are four *goal/value oriented* recommendations related to a strengthening of school autonomy for Spain. These are related to heterogeneity and meeting local needs: “... programme design and delivery to achieve a greater inter-cultural orientation and effectiveness, complemented by support for languages, culture, and religion of origin and by reforms of teacher training” (19), “... smoothen transition from ESO, improving programme design, and implementing professional development activities for greater teaching effectiveness” (5), “... pupil-mix, programmes and activities ...” (5), and “... strategic improvement (rather than legal compliance) ...” (22).

For Norway, one is related to goal/value where one should work on the local level to raise expectations: “Municipalities, the teachers’ and school students’ unions should establish a working group to explore how expectations about pupils’ intellectual capabilities can be raised” (14).

Regarding the framing of a diversity model, both external and internal framing are weak (-F):

| Framing | Dependent concepts | Spain | Norway |
|----------------------|---------------------------------|--|--|
| Internal (-F) | Choice | 2 (optional content), 4 (Learning options) | |
| | Culture/individual needs | 1 (inter-cultural orientation), 3 (supportive contexts for pupils at risk), 7 (context-sensitive, needs of adolescents, cultural setting), 13 (equity objectives according to selection), 17 (community involvement, extra-curricular activities), 23 (subgroups’ needs) | 4 (adaptive learning), 7 (follow-up counselling improved), 13 (support early learning of disadvantaged pupils), 20 (multicultural, special ed. in teacher training), 21 (support needs of immigrants) |
| | Social base | 10 (enhance home-school relation), 11 (community involvement), 12 (time-release parents), 14 (pupil mix), 15 (collaborative learning, social integration), 16 (learning through sharing) | 5 (anti-bullying) |
| External (-F) | Legal | | 10 (teacher autonomy to preserve the scope of innovation) |
| | Financial control | 14 (support for disadvantaged background children), 19 (establish minimum national expenditure level), 20 (supplementary funding disadvantaged communities) | |
| | Information | 1 (multiculturalism in teacher education), 5 (development for teaching effectiveness), 6 (sustained teacher training), 8 (renovated teacher education) | 20 (multicultural, special education in teacher education) |
| | Evaluation | 5 (subgroup participation/achievement), 8 (teacher education programmes), 21 (key performance indicators), 22 (strategic improvement), 23 (participation/performance of subgroups) | 8 (reforms), 13 (early learning of disadvantaged pupils), 15 (age- related subject benchmarks, testing), 16 (school website Skoleporten, added-value measures), 19 (light-touch monitoring of schools) |

Table 4: Analysis of framing in “equity through diversity” model.

For Spain, 14 elements are related to a weakening of the *internal framing*, i.e. to give pupils more influence on the teaching and knowledge, while for Norway, six recommendations are given, three of them addressing weaknesses.

For Spain, two recommendations are related to *choice*: “... increasing the optional content of compulsory secondary education ...” (2), and “... include applied learning options in the baccalaureate ...” (4). Choice is not an issue for Norway.

Teaching should focus on *culture/individual needs* to a higher degree in both countries. Here the recommendations are quite similar. For Spain, six recommendations are given: “... programme design and delivery to achieve a greater inter-cultural orientation and effectiveness, complemented by support for languages, culture, and religion of origin and by reforms of teacher training”(1), “... contexts which are more supportive of students ‘at risk’ and involve more activities to which low achievers and unmotivated learners better respond” (3), “... content of initial teacher education for secondary school ... reviewed ... to ensure a more practical and context-sensitive emphasis, aligned to the developmental needs of adolescents and the cultural setting of schools” (7), “... all schools ... formulate equity objectives ... and ... take into account, on a local basis, the extent to which schools have power to select their students formally or informally ...” (13), “... widen the range of opportunities in which students can experience success and take pride in learning, whether through extra-curricular activities, community involvement or through the arts, sports, leisure and other cultural enrichment activities” (17), and “That monitoring of educational participation and performance recognizes the needs of key sub-groups of the population and functions to highlight these needs and facilitates effective targeting of resources and strategies to address them” (23). For Norway, five recommendations are oriented towards the pupils’ culture/individual needs: “An increased emphasis should be given to the principle of adaptive learning” (4), “... follow-up counselling service improvement” (7), “... supporting the early learning of disadvantaged pupils in danger of underachieving” (13), “The time devoted to multicultural, bilingual and special education issues in teacher training should be increased” (29), and “The funding methods used to support the needs of immigrants should be reviewed after consultation with ethnic minorities”(21).

Finally, six are related to the *social base* of the schools, where home relations and participation should be improved: “... communication and reporting methods to enhance home-school relations”(10), “... to strengthen community involvement and cohesion and a greater commitment of parents to the cultural growth of their children” (11), “... periodic time-release of parents to visit schools and discuss their children’s needs and

progress” (12), there should be more student heterogeneity and collaborative learning: “... pupil-mix ...” (14), “... models of collaborative learning practices ... to enhance student learning and improve social integration in school” (15), and “... differential teaching approaches in which “meaning through practicality and learning by sharing” are present ... (16). For Norway, only one recommendation is related to a weakening of the internal framing: “Anti-bullying programmes research and development should be maintained” (5). This is both coded under strong and weak framing as it could demonstrate both more and less autonomy for the pupil, depending on how you see it.

Related to a weakening of the *external framing*, there are no recommendations for Spain, while one addresses strengths in Norway: “The scope for innovation should be preserved and enhanced, particularly where it may improve equity” (10). This recommendation refers to the degree of autonomy the teachers have, and their possibility to undertake innovative work.

To summarise: Spain has received 18 recommendations that could be linked to a diversity model, while Norway has received 15 recommendations, where six of these addressed weaknesses and nine strengths. While Spain is clearly recommended to improve access, community/home relations and the content and pedagogy to be more diverse and relevant to the students and to improve the transitions and progressions between the different levels in the educational systems, Norway is found to have good systems for these concerns. This, except for the kindergarten, that should be extended and opened for more children. What is specifically addressed for Norway is rather to market orient the education system through school choice, and raise the expectations for the students.

What is a common concern for the two countries is that multiculturalism in school should be stressed and improved. However, how that should be interpreted and employed to schools in relation with other elements stressed, like improvements of key performance indicators, is not a given. This will be discussed further below.

Discussion of the analysis

Apple (2006) claims that educational policies are often not characterised by progression or regression, but by contradiction, as demonstrated in this analysis. Both countries are (as expected) recommended to focus both an equity model and diversity model. When looking at the extra-discourse, intra-discourse and transmission contexts, no contradictions are expressed. Both countries are clearly recommended to have a system that gives more pupils access, more links/less dead ends in the system and relate more to multicultural/individual needs.

One important contradiction is found in the classification of the system context, where, on the one hand, the states should focus on national measurements, but at the same time provide more autonomy to the schools/local government, employ a more multicultural focus, provide choice and meet the individual needs and wishes of the pupils. The same possible contradiction is found in the internal framing: how does one combine a more multicultural focus/individual needs/adapted teaching with improvements to national measurements on key performance indicators? Is it possible to evaluate the performance of a school run according to the logic of “equity through diversity“ (see Apple, 1990; Solstad, 1997; Aasen, 2007)? The notion favours cultural freedom, a democratic school, but at the same time we find national control and measurements. Bernstein refers to this kind of thinking as “centralised decentralisation”, a trend that pervades all levels of current educational policies¹⁵. When contradiction is found: which of the two will likely have more influence on knowledge and pedagogy? Bernstein (2000, p. 36) claims that “... the key to pedagogic practice is continuous evaluation,” and tests may thereby have powerful effects on the teaching. This claim can also be supported by research from other countries on the effect of national testing (Clarke & Newman, 1997; Apple, 2006).

Furthermore, the controlling tools for the external framing show that for both Spain and Norway evaluations are important controlling tools. (One difference between the two is that Spain is recommended to control more through economic regulations). The lack of a multicultural focus and flexibility is thus not considered a consequence of lack of autonomy. Rather, teachers will be controlled and guided through economic incentives, information and evaluation to relate more to pupil heterogeneity. The internal

¹⁵ (Bernstein, 2001; Haugen, 2005; Aasen, 2007, Ball, 2007)

contradiction in this argument in relation to diversity/equality models is that state control is recommended to ensure more orientation to diversity, instead of letting the schools themselves arrange this through local considerations. This may, however, as I soon will argue, be important when employing perspectives from educational sociology on the diversity model, to regulate the influence from various local powers.

All in all, the recommendations and contradictions can be discussed in a broader picture; that is in relation to general educational trends and power relations. Unlike Solstad (1997), who claims that a diversity model will likely have an equity function, while an equality model will reproduce power relations, I will employ perspectives from educational sociology for both models. Bernstein (1977) claims that no matter the teaching or the content, neither will lead to equity because the different forms and contents are expressions of the dominant powers in society. If this is true, opening up the education system to more people, and relating more to multiculturalism or individual needs will have to lead to new exclusion mechanisms, or to new mechanisms of selection (cf. Bernal, 2005 on selection mechanisms in “open” systems in Spain). With that in mind, I will try to point out some elements that may be important to pay attention to regarding new “selection”.

Given that educational policies always favour dominant classes in society, I find Apple’s power analysis of a current educational trend he calls “conservative modernisation” interesting. Apple (2006) analyses the political field of education, claiming that an alliance is formed between neo-conservatives, neoliberals, authoritarian populists and the new managerial middle class. Through this alliance, the focus on traditional values and knowledge, the focus on market control through individual choice, the restoration of moral and quality improvement through testing are emphasised. These factors are also interesting in relation to the contradictions expressed in the OECD reports. Through national measurements of key indicators, raising standards and improvement of discipline focus on “real knowledge”, morals, efficiency and quality can be emphasised. By measuring these “objective” indicators and comparing them, parents can easily have access to knowledge of what are “good” and “bad” schools, and thereby choose the “best” school for their children. A difference is however expressed in the two reports on whether “school choice” should be implemented. In the OECD report for Norway, it is clearly stated (see recommendation 16) that the combination of parental choice, added-value measures and national testing should be

considered to improve equity. This market orientation can have consequences that will undermine the equity situation in education, rather than improving it (Clarke & Newman, 1997; Ball, 1994; Apple, 2006; Bernal, 2005)) because of the increased demographic homogenisation, making some schools worse and worse by extracting resources. In the OECD report for Spain the recommendations concerned with parental involvement are rather related to improve school's role in participating in the local community, where student heterogeneity is stressed, and recommended to be assured through specific regulations. However, remembering that Spain has a considerable amount of private schools (which are not recommended to be abandoned), a form of school choice is already present in the Spanish educational system.

Nevertheless, multiculturalism is an important element to be improved for both countries. There may however be different consequences and outcomes as to what "multiculturality" will mean. To quote Buras (2006, p.44):

To say that "we are all multiculturalists now" even if some are reluctant multiculturalists, actually masks the diverse strategies for their relative success or failure in helping neoconservative factions. It complicates any attempt to critically assess these different strategies for their relative success or failure in helping neoconservatives build alliances with subaltern groups, and in either reinforcing or undermining hegemony.

In other words, the focus on multiculturalism can also be used by subaltern groups to gain support and thereby access to power, although *how* multiculturalism is focused and the larger educational picture will not necessarily favour them, or might lead to a worsened equity situation (Clarke & Newman, 1997; Apple, 2006; Buras, 2006). This based on the fact that a diversity model is also not neutral. If opening for local voices, there is a danger that the strongest voices will dominate the knowledge and pedagogy, instead of a more democratic orientation. That is to say, whose diversity will dominate, and how does this relate to existing powers? Are the existing powers challenged? With this in mind, I find it of great importance that researchers investigate how "multiculturalism"/"meet individual needs" will be interpreted and used in combination with the measurement of key performance indicators (cf. the conflict between conservatism and progressivism in Spanish educational policies, Bonal, 2000).

In other words, I fear that the combination of these two equity models as given in the OECD reports may also provide good conditions for creating a segregated school ground. The combination of key measurements that clearly divide schools either good or bad, combined with the diversity orientation, by providing more power to schools, and to parents through for example school choice, can be a dangerous combination. In the long run it is possible that the schools will become more homogeneous internally, while more heterogeneous externally to distinguish the children from different schools from each other (cf. Bourdieu, 1984), and stratify different groups in a more efficient way. This will not only affect the actual schools, but also the communities, as they would likely become more socially segregated. To avoid this I find that it may be important that the national government regulates the demography and focus on multiculturalism of the different schools in quite explicit and direct ways. For example as is recommended for Spain, (cf. recommendation 14) through providing incentives for enrolling children from disadvantaged backgrounds. However, this may not be enough. To avoid segregation in education I will argue like Anyon, (2005) stresses, that an expanded concept of educational policy should be employed, through integration of wider politics for equity in the general society. One needs to think about education and equity in a much wider picture.

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Paper 3: Equity in school and lifelong learning? - an analysis of equity models in White Paper no. 16¹⁶ (2006/2007) of Norway

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Abstract

Nationally and internationally equity in education has become a key goal. In Norway, a white paper has been tabled to address how equity can be improved through education. In this paper the pedagogic and knowledge orientation of the initiatives is analysed and discussed in relation to two models of equity: "equity through equality" and "equity through diversity". The paper finds that although contradictions are present, the Norwegian ministry clearly favours the equality model. The author claims that the presented policies can be understood as a response to the global educational trend that Apple (2006) refers to as "conservative modernisation". This can further be related to the "Totally Pedagogised Society" (Bernstein 2001), where the adaptable, trainable individual is a key notion. The paper concludes that the lack of attention given to the diversity of citizens may be a major shortcoming, as lack of recognition is in many ways what causes educational failure in the first place.

Key words: *Norway, Education Policy, Equity through equality, Equity through diversity*

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2. Analyzing Recontextualizing Rules

Paper 4: Recontextualizations of Educational Policies: Background Knowledge in Teaching and Learning

An earlier abbreviated version of this paper was published in Hovdenak, S.S, Riksaasen, R. & Wiese, V. (Eds.) (2007). *Klasse, kode og identitet. Bernstein i norsk forskning* [Class, Code and Identity. Bernstein in Norwegian Research, in Norwegian]. Trondheim: Tapir Akademisk Forlag.

Abstract

This article investigates recontextualizations of educational policies aimed at equitable trainability by looking into an American project on learning-strategies that is also being used in Norwegian schools. One special feature of the project is its focus on the pupils' prior background knowledge. The project, it is claimed, is designed for all learners. Through a qualitative investigation based on an analysis of observations, interview data and pupil work, the author examines how background knowledge is interpreted and used in specific classroom contexts. Due to the different structuring of everyday knowledge and school knowledge, the author argues that if the social and cultural basis of school is not questioned, it is doubtful that the reproduction of power can be challenged by focusing on background knowledge. Furthermore, as demonstrated in the analysis, it may be hard to channel knowledge and pedagogy in school in specific directions using the learning-strategy project in question. Thus, the intentions of the state may be undermined by both teachers and pupils. Consequently, *who* can acquire the competence necessary to be trainable life-long learners will likely depend to a large degree on *how* the pupils' social and cultural backgrounds relate to the social and cultural basis of the school.

Key words: prior background knowledge, equity, life-long learning

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3. Analyzing Evaluative Rules

Paper 5: Recontextualizations of Trainability: Learning Strategies and Social Background

Abstract

This paper explores recontextualizations of educational policies regarding trainability and learning to learn, competences deemed necessary for life-long learning. To develop these competences, such generic modes as “learning strategies” are emphasized, both in the OECD and Norway. Aiming to investigate the focus on learning strategies in an equity model, this instrumental case study contrasts high- and low-achieving pupils according to a) learning strategies and b) social background in settings where a specific learning strategy project is being implemented. The study concludes that not much attention is paid to the school’s cultural basis, and therefore a focus on learning strategies will not improve equity unless the origin of the social inequities that are present in the school setting are first taken into account.

1. Introduction

Education and knowledge are an integral part of any economy and today, most OECD countries are concerned about preparing for the “global knowledge competition,” where they see the need for all individuals to participate in “life-long-learning” (see European Commission, 2008; Jensen & Walker, 2008; Mortimore, Field, & Pont, 2004; Norwegian Ministry of Education and Research 2006/2007; Young, 2008). Life-long-learning is understood by Bernstein (2001, p. 365) as both the key to and legitimator of what he calls the “Totally Pedagogised Society” (TPS). In the TPS, the state increases its control over its citizens, who are expected to be in constant development according to what society needs from them. This is underpinned by a belief that knowledge and skill demands change so quickly that there is a constant need for flexibility among a nation’s citizens, along with a demand to be even more productive (cf. also Goodman, 1995). Bearing this in mind, much attention is given to how schools can help learners/citizens face such rapid changes by providing them with competences that equip them to function in this ever-changing society.

However, school is not a neutral ground with respect to ideology and power, but rather a central arena for power struggles. In relation to this, Basil Bernstein (1977/2000)

analyses how power and control are reproduced in schools, demonstrating how education may have relative autonomy, and consequently how educational policies may not be implemented into pedagogic practice in the way the policy-makers may have intended. Using the concept of *recontextualization* (Bernstein, 2000), he describes the construction of *pedagogic discourse*, delineating three fields in which different groups try to gain terrain:

a field of *production* where new knowledge was constructed; a field of *reproduction* where the pedagogic practice in schools occurred; a field, in between, called the *recontextualising field*. Activity in this field consisted of appropriating discourses from the field of production and transforming them into pedagogic discourse (Bernstein, 2000, p. 113).

When it comes to the field of recontextualization, Bernstein distinguishes between the *official recontextualizing field (ORF)* and the *pedagogic recontextualizing field (PRF)*, where the first produces the official pedagogic discourse, and the latter creates the professional pedagogic discourse³⁰. These fields are often in conflict, and the “...existence of the PRF as well as the unofficial elements within the ORF strongly suggest that the state can never monopolize power in curriculum production” (Apple, 2002, p. 613). As school is relatively autonomous, the intentions of the ruling power’s policies implemented in the fields of production and recontextualization may be undermined:

almost all ruling regimes have sought to ensure that the school knowledge transmitted by the educational system advances their interests in state formation. However, it is dangerous to assume that schools in general and the curriculum in particular serve the dominant group in a mechanical and unmediated manner ... (Wong & Apple, 2003, p. 84).

Today, taking the above-described TPS into consideration, key competences that the state is trying to develop are those found necessary to create trainable individuals, flexible enough to adapt to the rapid changes in the knowledge economy (European Commission, 2008). One example of such competencies is “learning to learn”, which lays the groundwork for adapting to “new” knowledge modes entering schools. Bernstein calls these *generic modes*³¹, and

³⁰ Pedagogic discourse is defined by Bernstein (2000, p. 32-33) as “a rule which embeds two discourses; a discourse of skills of various kinds and their relations to each other, and a discourse of a social order”.

³¹ Bernstein (2000) distinguishes between three performance modes found in all levels of official education: *Singulars*, *Regions* and *Generic*: “Singulars are, on the whole, narcissistic, oriented to their own development, protected by strong boundaries and hierarchies” (p. 52). Examples are physics, chemistry and history. While “Regions are the interface between disciplines (singulars) and the technologies they make possible”.

describes them as “... constructed and distributed outside, and independently of, pedagogic recontextualizing fields” (*recontextualizing location*). They are directed towards extra-school experiences (*focus*), often, but not only found in Further Education (*location*), and they are “... produced by a functional analysis of what is taken to be the underlying features necessary to the performance of a skill, task, practice, or even area of work,” but silence the cultural basis of these (*misrecognition*) (Bernstein, 2001, p. 53).

One example of a new knowledge mode that both the OECD, in the PISA investigation, and the Norwegian government, in recent educational policies and practices, are emphasizing is “learning strategies” (Brøyn, 2002; Norwegian Ministry of Education and Research 2003/2004). Learning strategies can be described as specific ways of thinking and acting in relation to school knowledge. They build on research on the behaviour of good learners, where the assumption is that the behaviour and thinking of good learners can be extracted from the specific content and context, and taught to pupils with “unstrategic” behaviours so that they may also become better pupils (Weinstein, Bråten, & Andreassen, 2006). Although learning strategies may not encompass all characteristics of generic modes described by Bernstein, I suggest that they bear important similarities, and that this knowledge mode, which traditionally has been found outside school, is now entering the school arena. This may be related to the focus on school as a life-long learning project (cf. paper 3). The learning strategies differ according to the first criteria, the recontextualizing location, as they are constructed at the university, which is to say within the pedagogic recontextualizing field. However, they encompass the characteristics of generic modes as they are oriented towards learning to learn, which can be related to the life-long learning project, e.g. extra-school experiences (*focus*). With respect to location, the focus on learning strategies has traditionally been found in further education, although the PISA investigation and recent Norwegian educational policies have now also found them relevant for younger pupils. Furthermore, this also fits the above description of generic modes in relation to misrecognition, as the cultural basis of school is not taken into consideration.

One interesting example of knowledge described as learning strategies is found in the American project CRISS (CReating Independence through Student-owned Strategies) (Santa, 1993). Even though learning strategies as a concept, as described here, have only recently been introduced in educational policies in Norway (Norwegian Ministry of Education and Research, 2003/2004), many Norwegian schools have been working on this project for a

number of years. The CRISS project, supported by the National Reading Panel in the USA, is described as an interdisciplinary programme based on principles of cognitive psychology and brain research, where the aim is to improve the learning of pupils from grades three to twelve in American schools. More specifically, it is said to be effective for curricula in elementary classrooms, and in middle- and high-school classes in mathematics, science, social studies, language, arts, fine arts, technology and physical education (Santa, 2004). Moreover, “(...)it is designed for all learners” (Santa, 2004, p.1). That is to say, the strategies provided are to be culture, age and subject independent. CRISS is based on the following principles:

- Students must be able to integrate newly learned information with prior background knowledge
- Students must become actively involved in their own learning
- Students must be able to organize information from their reading
- Students must be able to monitor their own learning in order to identify which among their repertoire of learning and studying strategies are the most effective for a given set of learning tasks
- Students must know how to process content material through writing and discussion

The project holds that these concepts **can** and **should** be taught and that they are key to maximizing the acquisition of information” (Santa, 1993, p. 4).

It is difficult to challenge the notion that the principles from the above-described CRISS project are important for learning school knowledge. However, the claim that CRISS is designed for *all* learners is very interesting, especially when one considers the fact that school is a key arena for social reproduction. Both in Norway and internationally, the lack of equity in school is given a great deal of attention, where some social backgrounds are seen as being favoured over others (Mortimore et al., 2004; Norwegian Ministry of Education and Research, 2003/2004; Norwegian Ministry of Education and Research, 2006/2007; Teese, Aasen, Field & Pont, 2006). In all the mentioned documents, gender, ethnicity and social background are highlighted as potential barriers to success for pupils. For example, in White Paper no. 30 to the Norwegian Storting (Norwegian Ministry of Education and Research, 2003/2004, p. 85), the following conclusion is found: “It is still troublesome that there are great differences in learning outcomes from one pupil to the next, and that there are systematic differences according to gender, social and ethnic background” (my translation).

Bearing this finding in mind, it is an interesting question whether the CRISS project can potentially affect cultural orientations in school by opening for voices traditionally not recognized, thereby enhancing the school's role in contributing to equity. Or, one might wonder: Is the cultural basis of the school taken into consideration in the CRISS project? The author of the project, Carol Santa (2005) states that although it is suggested that CRISS is designed for all learners, there is no research investigating its possible relation to social background. The research that has been carried out thus far is experimental, where test groups are working with CRISS and then compared with control groups that are not working with the project (Santa, 2004; Santa, 2008). The research on CRISS to this point has not focused on individuals, but rather on pupil groups. Furthermore, as Santa (2008, p. 5) states: "These comparisons are often compounded by other factors which make it difficult to tease out students' gains in achievement based on Project CRISS from gains derived from other effects".³² This fact leaves the CRISS project in need of further investigation, especially with respect to experiences of pupils with traditionally disadvantaged backgrounds and the project's claims that it is beneficial for *all* children.

1.1 Research Questions

Utilizing a qualitative approach, I will undertake to investigate what may be missing in Santa's research (cf. Bartolome, 1994; Bernstein, 2000; Siegel & Fernandez, 2000; paper 4), examining how CRISS may actually be a better fit for pupils from some social backgrounds than others. To this end, I ask if the CRISS project might represent a simplification of the complexities involved when aiming to create culturally relevant pedagogies (cf. Ares, 2006). Since my interest is in investigating how CRISS can relate to equity, I will highlight the social background of pupils selected as high and low achievers by their teachers because *evaluation* of what is "good" and "bad" achievement ultimately is determined by whether the pupils have "good" or "bad" learning strategies (cf. Weinstein, Bråten, Andreassen, 2006).

More specifically my research questions are the following:

- 1) What characterizes the learning strategies (for acquisition of information, organization of information, building on prior background knowledge, controlling one's own learning and activity) of high- versus low-achieving pupils in pedagogic practices where CRISS is used?

³² Santa (not dated, p. 1) claims: "CRISS does make a significant difference in student performance. We also have some evidence that CRISS students perform better on state assessments".

- 2) What is the relationship between high- versus low-achieving pupils' home background and parents' educational level?
- 3) Can the CRISS principles claim to be "designed for all learners" in a school context? Why/why not?

2. Methodology

The methodological approach chosen was an *instrumental* case study (Stake, 1995). Stake differentiates between *intrinsic* and instrumental case studies. In the former, the researcher has a special interest in the case itself, for example in the CRISS project *per se*. In the intrinsic case, the researcher would seek to examine any and all features of the programme in a holistic manner, whereas in the instrumental case study, the researcher's own questions are the impetus for the investigation. In this study, I am more interested in how the policies on learning-to-learn are recontextualized in specific classroom practices through the CRISS methods, and whether or not these have any bearing on enhancing equity in schools.

2.1 Data sources

To minimize misrepresentation I undertook a *data source triangulation* with the intention of investigating whether the findings I reported changed meaning under different circumstances (cf. Stake, 1995). The data analysed is based on a qualitative inquiry, where the materials are: *observations* of classroom contexts where teachers use the CRISS project, *interviews* with teachers about their classroom practice, and collected *pupil work* with CRISS, characterized as high or low performance.

2.2 Selection and Procedure

The classroom practices to be observed were selected according to only *one* specific criterion after ascertaining with the course instructor that the teachers and pupils had experience of work with CRISS for more than one year. This was a criterion because even though Santa (2003) claims that CRISS is age and subject independent, and "designed for all learners", the teachers and pupils need to have some prior experience with the project. If CRISS is indeed

universal, it will not matter where the data is collected. The data material therefore is focused on *variation* rather than similarities.

The following procedures for data collection were used:

First, observations were carried out in classrooms where CRISS was used: all together 35 hours of observations of pupils in second to ninth grades, and working with CRISS in various subjects (mathematics, Norwegian, English, religion, social science, natural science, and situations with no specific subject orientation). The teachers and pupils had from one to four years of practice with CRISS, mostly two to three years. During the observations I talked with pupils and teachers about the pupils' work.

After the observations, interviews (of 1 – 1 ½ hours) with the involved teachers (14) were conducted, where the specific topic of discussion was the observations, rather than teaching and learning in general. I found the specific topic to be quite important, as some of the teachers were claiming that the CRISS project improves the learning for low-performing pupils to a high degree. However, since I had observed specific pupil work beforehand, we could discuss more critically what was taking place in the classroom. Many times, the so-called “improved learning” rather referred to pupils “doing something” or performing at a low level, than qualitatively improving their learning. Important elements to be discussed in relation to high- and low-performing pupils were: What characterizes their abilities and disabilities? What learning situations are more difficult/easier for them (with reference both to the specific practice observed, and other practices with different characteristics)? Is there a difference in performance when working with CRISS as opposed to not working with CRISS, and if so: what is the difference? What are the pupils' parental backgrounds in terms of work and education?

Later during the data collection, the involved teachers were asked to collect two performances they considered to be high achievement according to CRISS criteria, and two they considered to be low, and to give grounds for their evaluation. This was done to make the teachers more explicit about their evaluation criteria, as some of them had a hard time explaining what they characterized as a high or low performance. This was easier to do when they had a specific reference to discuss. All in all, 18 specific works were collected (small texts, larger projects, mind-maps), where nine were considered to be a high achievement, and nine were considered to be low.

2.3 Analysis

As my aim was to examine the validity of the statement that CRISS is designed for all learners, the focus of my research was to critically investigate if there was a relation between social background and high and low performance in contexts where CRISS is used. To do this, I needed to compare pupil performances that were characterized by difference rather than similarities. Through comparisons of differences the data may become clearer than when not comparing (see for example Haugen ,2005, papers 2, 3, 4).

Using the “constant comparative method”³³ (Glaser, 1992), the study was progressively focused (cf. Stake, 1995).³⁴ Therefore the data collected is not comparable in all elements I found of interest. For example, the initial interviews were broader than the follow-up interviews as I let the teachers lead the direction of the interview to a higher degree in the first round. The fact that none of the interviews are alike makes it hard to quantify each element that was of special interest. For example, the interviews varied according to whether we focused generally or more specifically on high- and low-achieving pupils. Some wanted to talk about high and low achievers in general rather than focus on specific pupils. This means that some of the material is based on general descriptions, or what teachers saw as tendencies, while other parts of the material are based on specific pupils as examples. Furthermore, not all the teachers had all the information I needed about each pupil (for example, they did not know the work or educational level of all parents). Since the data consist of both descriptions of general tendencies relevant for high-and low-achieving pupils working with CRISS and specific examples of pupils, the exact number of pupils this research is based on is unclear. However, I can say the following: 10 specific examples of high-achieving pupils (six girls and four boys) and 23 specific examples of low-achieving pupils (14 boys, nine girls) form the material, *in addition to* the general descriptions.

Consequently, since I do not have all the data about each pupil, I have not analysed the material quantitatively. Instead I have collected all information regarding high- and low-achieving pupils in their work with CRISS along with what information I have on the social background of some of the pupils, and described the collective material, implying that all

³³ In the constant comparative method the researcher tries to develop categories by constantly analysing and comparing the data as the collection process proceeds. In this way, the collected data are gradually more focused and the process stops when new data do not provide new information.

³⁴ Progressive focusing is defined as improving on the research questions as the study continues (cf. Stake, pp. 9, 22, 48, 78).

elements described do not count for every pupil, but for the pupil group as a whole. Therefore, it should be pointed out that the material is not generalizable, but can rather serve as an initial exploration from which hypotheses can be made for further research where a tighter methodological approach can be used (this will be discussed further at the end of the paper). Nevertheless, to triangulate the analysis (cf. Stake, 1995, I participated in a meeting with a teacher network (20 teachers) and project leader who were working on the implementation of CRISS. In that meeting I presented my analysis and hypotheses (which will be described later), and asked the teachers to give a critical response. All teachers who offered comments acknowledged my work, with the exception of one, who thought I gave too negative a description of the low-achieving pupils' work with CRISS. Three of the teachers came to me during the break and thanked me for doing this research because they found it difficult to talk openly about the problems they experienced trying to implement the CRISS project. It was not as easy as promised by the head of the course. To further strengthen the reliability of the material, I will discuss it in relation to other research where similar issues are addressed.

3. Theoretical framework

This analysis is framed by Basil Bernstein's code theory which examines the reproduction of power in school by looking at the way content is classified and interactions are framed. In this study, I examine these codes vis-à-vis the plotting of high and low performance according to the CRISS project and the relationship between pupils' social backgrounds.

The various cultural forms used in society and school are described as "codes". Performing well in school often depends on having insight into these codes:

if code selects and integrates relevant meanings, then code presupposes a concept of irrelevant and illegitimate meanings; ... if code selects forms of realisation, then code presupposes a concept of inappropriate or illegitimate forms of realisation; ... if code regulates evoking contexts then again this implies a concept of inappropriate, illegitimate contexts. (Bernstein, 1990: 14)

To perform within the criteria for legitimate and relevant communication, the pupils are dependent on having insight into the recognition and realization rules in the context. Through the recognition rules, one context is distinguished from another, while the realization rules describe specific demands within that context (Bernstein, 2000). In relation to the pupils in this study, it is likely that those categorized as high achieving by the

teachers have grasped how to interpret and use CRISS in a strategic way, while those categorized as low achievers by the teachers likely have not grasped how to use it. Whether the rules are grasped or not tends to depend on how the pupil's *orientation to meaning* relates to the school's social basis, where the middle classes are favoured and the lower classes disfavoured. Consequently, those whose backgrounds are favoured in school will have an advantageous position compared to those whose backgrounds are disfavoured. Some children, especially lower working-class children, would use a principle which is relatively *dependent* upon a specific context, whereas the middle-class children would use a principle which is relatively *independent* of a specific context (Hasan, 2005). The interesting point for this study is whether there are different orientations to meaning through the practices of the learning strategies from the CRISS project between high- and low-achieving pupils. Then we need to ask if these orientations are also related to the pupils' social background, and finally, seek to understand how we can understand these differences.

In the following, I will analyse the descriptions, statements, observations and collection of specific performances the teachers have chosen in different teaching/learning situations, and explore similarities and differences in learning strategies between high- and low-achieving pupils.

4. High- versus low-achieving pupils' learning strategies

The analysis will demonstrate how the learning principles/strategies from the CRISS project (cf. principles of the CRISS project above) are interpreted by high- and low-achieving pupils. The principles/strategies are represented on the left in the table. At the top, I have separated the high- and low-achieving pupils.

| | High-achieving pupils N=10 (6 girls, 4 boys) + general descriptions | Low-achieving pupils N=23 (14 boys, 9 girls) + general descriptions |
|--------------------------------------|---|--|
| Acquisition of information | Summarize the content Good note taking Put in own words Focused on understanding Remember fairly easy Deliberate from text | Need help to store in Long Term Memory Need help to extract essence/compress content Take too many notes, forget easily Hard to find out what the pupil knows |
| Organization | Restructuring content/own organization Use of different sources to make new text Clear hierarchies with various levels Good transitions between elements in text Can implement one strategy from one context to another Understand principle behind different schemes. Like the structure, easy to do it "right" Do not like structure, like to perform more freely, find schemes too tight | Copy book structure/teacher model Have difficulty building hierarchies in mind-maps, building hierarchies dependent on knowledge to structure Have difficulty learning structure, ask teacher to provide clearer instruction Technical/schematic understanding of schemes/strategies introduced by teacher Hard to import learned strategy to new context No reorganization of content, copying structure, organization, wrong interpretation of strategy for organization, concentrate on scheme, less on content, implementing schemes/strategies makes it more difficult. |
| Building on prior knowledge | Questioning content, manipulating knowledge, making knowledge, bring own material to elaborate content given, use of different sources, add own parts, draw examples, developing questions. Insisting on understanding. Interpretations of symbols as representing something else, able to employ given structure (mind-map, structure note) in another context, instantiation of principles to own world, exemplification Develop text Performance comes naturally Lot of knowledge to build on, relevant knowledge Good language. Creative | Wrong elaborations, associate too freely, outside the theme, irrelevant prior background knowledge activated Hard to understand concepts, few concepts to build on, hard to find out what the pupil knows, lack of relevant background knowledge, hard to instantiate general principles Easier working with concretes than abstracts, dependent on familiar theme/context to understand principles, literal understanding of symbols Hard to reproduce structure (ex. :mind-map, structure note) in a new context Difficult to use different sources of information Difficult to formulate with own words Lack of interest Lack of language Lack of knowledge, experience |
| Monitoring one's own learning | Work strategically to remember content (see org., memo) Can make realistic goals, find relevant literature, how to structure, understand structure behind knowledge expected to be produced, know how to do a project, just go ahead and do it. Work strategically, clear goals, systematize different themes from different sources to unify them and make a new text. Free to choose | Hard to make the strategies suggested by teacher work (mind-map, note-taking) Need help to find out what to learn, how to find it, where to find it, specific goals, need teacher to +C+F, project too abstract, too much to monitor, hard to extract information from texts Hard to evaluate/control own learning, not sure of learning goals, although teacher modelled and explained strategy Bad reader |
| Active Learning | Work hard Independent Work fast High performing in all subjects Do only what is required | Avoidance, passive Follow clear instructions Copying Work slow Dependent on teacher Unfocused Like doing practical things Hard to start Work hard (girls) Like to draw Low performing in all subjects Guessing |

Table 1: Teachers' descriptions of high- and low-achieving pupils' learning strategies

4.1 Acquisition of information

Acquisition of information refers to the claim that the CRISS strategies/principles are the “key to maximizing the acquisition of information” (Santa, 2004). The table shows great difference between the high- and low-achieving pupils’ memorizing strategies. Although they intend to do the same, the result is very different. A ninth grade teacher reports great differences between the pupils when it comes to their strategies for memorizing content for a test:

I can compare four girls in my class, two strong and two weak pupils. What they have in common is that all four of them work hard with their school work. I feel very bad for two of them. It’s as if no matter how hard they study, it doesn’t pay off. It’s like it doesn’t matter how hard they study, they still can’t get it right. They have bad strategies for learning say, history. When they take notes, they note down everything, they copy the book. They don’t know how to extract the important words, facts. And I don’t manage to explain it to them either, although I’ve tried over and over again. They have a hard time learning the material because they try to memorize it, but it’s too much.

The other two girls always do well. They compress the content, writing down important words, trying to express the content in their own words. They work on it at a different level. They understand the content and talk about it deliberately from the text. And they remember the material very well.

This teacher basically puts her finger on what all of the teachers mentioned about differences in memorizing strategies for high- and low-achieving pupils. The main problem for the low-achieving pupils is to extract the essence, note key words, or, in other words, separate important information from less important information (cf. recognition and realization rules).

4.2 Organization of information

When it comes to organizing the content, the teachers also reported substantial differences in the pupils’ work. The CRISS project suggests different models for organizing content: you can organize it hierarchically (like mind-maps), thematically, or structurally (structures for writing texts). All the teachers said that it was especially helpful for low-achieving pupils to use a specific structure for writing a text. These pupils had become much more active after they started working with this specific structure.

However, there was a major difference in terms of whether the pupils could use this structure flexibly or if they needed guidance to be able to use it. While high-achieving pupils could use the strategy they had been provided in different contexts, low-achieving pupils had great problems using it on their own. They were dependent on the teachers to show them what to do in every learning task, or the content had to be very simple, for example writing about what they did during Easter. During one of my observations I experienced the following:

All pupils in the fifth grade were to organize a mind-map of the content about the Iron Age in their book. I noticed that one girl was copying the book, writing *everything* in different bubbles in her mind-map. The content was not organized according to any structure, but by how much fitted into one bubble. I asked the teacher what she thought this girl learned from this. The teacher answered: I don't know, maybe she doesn't learn that much, but at least she is *doing* something! I have experienced that more pupils have become active when using learning strategies.

High-achieving pupils could organize content in different ways, make a new text based on different sources or employ one strategy from one situation to another. Most pupils wanted to be provided with a clearer structure that they could use, but some could also find fault with it. One teacher in fifth grade related the following about one of her pupils:

Most of the pupils like to get this structure. It is as if it is easier for them to perform, maybe it is clearer for them what to do. But, one negative effect of this is that in employing this strategy, everybody writes the same text.

One of the girls, however, ... she is very brave. Her mother is the dean of a college and her father is a researcher. She says: “- I don't like this. No matter what you say, this is not the way to write! I want to write my own way”. And she can do it. She's a very good writer. She performs at a very high level. Because, she's right. The CRISS strategy we give them is very strict. And because of that, they all perform in the same way. The texts become almost identical. But for the low-achieving pupils this is good support.

To summarize, the most important difference in the use of CRISS to organize strategies between high- and low-achieving pupils appears to be that the high achievers are able to grasp the concept and use it in more complex ways, whereas the low achievers likely copied structure and content, performed in a “technical” way and were dependent on teacher instructions in a new context. High-achieving pupils performed more deliberately and could

use the same structure in a new setting, and some could even find fault with the structure. This implies that the pupil has good insight into the school's recognition and realization rules.

4.3 Elaboration

Elaboration refers to the way the pupils relate the new content to prior background knowledge, either to their own life or to other knowledge. One difference that was expressed and observed was how the pupils worked to elaborate on the knowledge. According to my data, while high-achieving pupils had much knowledge to build on, including rich vocabularies and useful experiences from home to connect to the knowledge provided at school, low-achieving pupils more likely lacked relevant knowledge and had poor language (as reported by the teachers).

Not only did low-achieving pupils lack relevant knowledge, but also, even if they had relevant knowledge, it was reported that they likely did not utilize it or connect it in the right way; by either associating too freely or not focusing on the essence of what they knew in connecting it to the new information. Some teachers reported that drawing on prior background knowledge could end up with the pupils focusing on other things than what they should be working on. For example, one third grade teacher reported:

If I ask the pupils to talk about what they know about trout, some of them can get really lost. Like, “you know, me and my grandfather went fishing one time. And you know, we caught five fish. My grandfather brought hot chocolate, and we walked a really long way, etc, etc..”.

But not only focusing on the “right” knowledge could be difficult, it could also be hard to perform the “right way”. An example of such a situation was a third grade teacher who wanted the pupils to learn about how to act towards each other so they could all experience well-being in school. She also wanted them to learn how to structure knowledge hierarchically and to build a text related to this. She gave the class this task:

Now you make a mind-map where you write about: “For everybody to enjoy themselves in school one needs to...” Afterwards we’ll all get together and discuss what we need to do. Furthermore, you are going to write your own text where you tell what you yourself can do to make a better day for everybody. When writing the text, I want you to write a structure plan.

During observations I noted this:

I see two boys not writing anything on their mind-map. They try to hide their sheet when I pass by, and signal with their body language that they do not want me to establish contact with them. I see a girl writing a lot on her sheet, with three levels in her hierarchy. When the whole class gets together with the teacher again the two boys do not say anything. They keep still, passive, hiding their sheets of paper. The other pupils write their principles for good behaviour on the blackboard.

Afterwards the teacher tells them to go to their seats again and write about how they can specify these principles for good behaviour for themselves: what can you do? The passive boys copy some of the elements written on the blackboard. Their writing is clumsy and they use big letters. One of the boys keeps hiding his sheet, while the other shows his classmate proudly what he has written.

I would suggest that the theme of this class is relevant for everybody, and everybody should have something to say about it. The theme of focusing on social behaviour is in itself not exclusive to anyone. However, two of the boys in this class have great difficulty performing in this situation. They still copy or remain passive. It appears that they have trouble understanding what is required of them (cf. recognition and realization rules).

4.4 Monitoring one's own learning

Monitoring one's own learning as described by CRISS principles refers to the pupil's ability to "monitor their own learning in order to identify which among their repertoire of learning and studying strategies are the most effective for a given set of learning tasks" (Santa, 2004).

While teachers reported that high-achieving pupils arrived at their own strategies for solving tasks, supposedly by knowing how to make realistic goals, being able to evaluate their own learning process and organizing content in new ways, low-achieving pupils tended to be quite dependent on the teacher to be able to perform. A teacher from sixth grade related an experience demonstrating this:

I gave the class this task: now you use the KWL method and do a project on Australia (procedures working in three steps: What do I Know about this theme (prior background knowledge); what do I Want to learn (express learning goals and how to find it); what have I Learned (control own

learning). The high-performing pupils have no problem with this method. They just go ahead and do it.

The weak-performing pupils have great problems, starting already when they are to express what they know about Australia. As an example, one of my pupils didn't have much to say about the topic at all. And to set goals for the project! Impossible. He did not know what to learn, to set realistic goals, or even to express what to search for. So, what I did was that I went to the library with him and I found a book about Australia. I showed him what pages to read to find out about: number of inhabitants, capital, rivers, what they produce and so on. I gave him a big, blank sheet of paper, where I wrote the headings in different columns: capital, inhabitants... He needs me to follow up very closely, needs things to be very clear for him about what to learn, and needs help finding the material. The CRISS-project method is way too difficult for him. This class has used CRISS since the second grade.

As described above, monitoring one's own learning is a very hard goal to achieve for all pupils due to variation in knowledge about the recognition and realization rules.

4.5 Active Learning

Finally, one of the CRISS principles relates to the *active learning* on the part of the pupils. According to CRISS, "Students must become actively involved in their own learning" (Santa, 2004). In comparing what characterized high- and low-achieving pupils' activities, I also found great differences according to this principle.

Both high- and low-achieving pupils were described as hard working. However, according to my data, this element was clearly related to gender: When the teachers reported on low-achieving pupils who were "hard working", they were all girls.

In general, the level of active learning as reported and observed was quite different for high- and low-achieving pupils; while high-achieving pupils tended to work quickly and independently of the teacher, the low achievers tended to work slowly and were dependent on the teacher's help to perform. Low-achieving pupils tended to avoid learning situations, and were often unfocused or passive. Furthermore, they tended to spend much of the time copying (from book, teacher or peers) or guessing.

To summarize, as I have shown, there was a substantial difference in high- and low-achieving pupils' use of the various strategies. They all worked with the CRISS principles/strategies, but in qualitatively different ways in all the investigated elements: acquisition of information, organization, elaboration, monitoring of their own learning, and their level of active learning. In the following section, I describe the teachers' reporting on the high-and low-achieving pupils' social backgrounds, based on their parents' educational level and parenting behaviour.

5 Social background of high- versus low-achieving pupils

Below is a table which shows the relationships between high- and low-achieving pupils in terms of their social backgrounds. At the top of the table, I have categorized pupils as either low or high achieving. On the left, I have six categories referring to social background: high/low educational level of parents, unsupportive/supportive school upbringing and turbulent/harmonious home. These categories were developed from what the teachers said about the home background of high- and low-achieving pupils.

| Home background | Low-achieving pupils N=23: 14 boys, 9 girls + general descriptions | High-achieving pupils N=10: 4 boys, 6 girls, + general descriptions |
|---------------------------------------|---|---|
| Highly educated parents | Well educated, child dyslexia | Dean of college, researcher, architect, natural scientist, high education |
| Low educated parents | Seaman, hairdresser, secretary, carpenter, car mechanic, ironmonger, no education | |
| Supportive school upbringing | Okay follow-up | Academic ambition for child Interested in child, talks, motivates Good language Computers/resources/books Motivates |
| Unsupportive school upbringing | No follow-up homework Do not attend school meetings No day care Negative relation to school Low stimulation Lack of resources No academic ambitions for child No books, experience, talks Street-language/bad language Lack of structure | |
| Turbulent home | Foster care, divorced parents, hard conditions, preoccupations, busy home, work late, play alone outside, left alone | Divorced – shared custody, follows up too much, child dependent, pleases the adults |
| Harmonic home | Okay at home | Liberal education – wise boundaries, academic ambitions, but no pressure |

Table 2: Teachers' descriptions of high- and low-achieving pupils' social background

Table 2 shows a clear relationship between those pupils identified as high versus low achievers and their parents' educational level. From my data, high-achieving pupils tended to have parents with high educational levels (those reported have the highest level: for example researchers, architect, dean of a college). The opposite was found for low-achieving pupils (no higher education or professions requiring no higher education). Only one exception was mentioned in my material: In this case a boy whose parents had a high level of education but whom the teacher identified as dyslexic and therefore a low achiever.

When investigating how teachers reported the observed (or sometimes assumed) upbringing of pupils in relation to school achievement, there was a clear connection between a supportive school upbringing and the educational level of the parents³⁵. The high-achieving pupils experienced an upbringing which could be described as preparing them for and supporting them in school – through having academic ambitions for the child, facility with academic Norwegian and knowledge that connected with school culture, books and computers available, and by showing interest and motivating the child for school work. Related to the low-achieving pupils, only one home was reported by the teachers to have good support from parents; the highly educated parents of the boy with dyslexia. In these terms, he is an atypical example of a low achiever.

In general, according to my data, low-achieving pupils came from an unsupportive school upbringing. Their parents tended to demonstrate a negative relationship with school, having few resources in terms of school knowledge, language, books or computers. This may be critical for learning, as demonstrated in one of my observations:

A boy in fifth grade told the teacher that he could not do the homework because they did not have a computer at home. "Ok," the teacher said, "you can copy John's work". I asked the teacher about this boy, and she told me: "He's the only one in this class of 60 pupils that doesn't have a computer". I asked: "But should you then, and are you allowed to give him homework he can't do?" "Actually, I never thought of that, but I probably shouldn't," she replied

³⁵ However, it has not been investigated as to how teachers' expectations of students based on social background may act as a "self-fulfilling prophesy". It should also be mentioned that when teachers selected two high and two low performers, these most likely represent the "top" and "bottom". The students in the middle are not represented here.

Furthermore, according to my data, the parents tended not to motivate their children, nor demonstrate academic ambitions or interest in the pupil's schoolwork. And often they did not attend school meetings.

The home situations as described for high- and low-achieving pupils were quite different. The high-achieving pupils' home situations were mostly described as harmonious, although two of the pupils' had seen their parents go through difficult divorces and could be followed up too much. The low-achieving pupils' home situations were more likely described as turbulent and busy, with children left on their own, having preoccupations they should not have, and having to deal with divorce, hard conditions and foster care.

To summarize: There was a clear tendency as found in my data that those selected as high achieving, and thereby pupils working strategically with the CRISS strategies/principles, tended to come from highly educated, school-supportive, often harmonious homes, whereas those pupils selected as low achievers, and thereby unstrategic when working with CRISS, tended to come from low educated, often non school-supportive, sometimes turbulent homes. Some of this can be supported by other research, for example the relation between the educational level of parents and achievements at school (cf. introduction). However, this determining whether or not the parents are school supportive, and whether or not the homes are harmonious, may be reflections of assumptions about the characteristics of the different classes (cf. Berkowitz, L. 1986). In other words, the assumptions about the level of support of the parents and whether or not homes are harmonious may be the result of teachers' biases and beliefs about these families, rather than any anchoring in hard evidence on the actual home situations.

6. Discussion and conclusion

Research on learning strategies is an expansive field. Nonetheless, the effects of directly teaching learning strategies to pupils are not convincing (Bråten & Olaussen, 1999). This study, framed in research on school as an agent in the reproduction of social inequalities, demonstrates that the intentions of the field of production to create curricula that work for children of *all* social backgrounds do not necessarily function as planned or desired.

As I will explain, this research may present some hypotheses on why this may be the case. However, first, we need to understand the implementation of such “technologies” in recent educational policies.

When mirrored against current Norwegian educational policies focusing on equity-through-equality (as opposed to equity-through-diversity, Solstad, 1997) (see paper 3), it is understandable that such “technologies” are entering schools. As this equity orientation is not open for cultural plurality, it may provide the grounds for using instrumental context-independent skills-learning, like the CRISS project, to improve pupils’ achievement. In the equity-through-equality orientation, inequities are to be targeted by providing opportunities for all to learn the same skills, where testing and evaluation serve as measures of whether equity is being improved. The skills as such are not questioned in relation to the pupils’ social backgrounds, but regarded as neutral instruments, that is, simply what everyone needs to possess to manage in their future lives. Crucial skills found necessary for future society are these days often couched in terms of an “enterprise culture,” where individuals are supposed to make entrepreneurs of themselves, becoming good workers with “... personal and individual qualities of: initiative, drive, determination, self-monitoring, independence, autonomy, self-reliance, risk-taking, decision making, flexibility and leadership” (Smyth & Shacklock, 1998, p. 79). Skills-training programmes like the CRISS project aim to develop pupils according to many of these qualities in a school context (cf. as evidenced in the name, “CReating Independence through Student-owned Strategies”, and the principles described in the introduction).

Nevertheless, the explanation as to why the teaching of these strategies tends to be so difficult, and why success with these strategies (at least in the case here) seems to be dependent on social background may be that learning strategies cannot be separated from the specific school content and context to make meaning for the pupils. Again, this can be explained through the Bernsteinian concepts of recognition and realization rules. For example, in applying the “elaboration” strategy, it is very important *what* prior background knowledge you activate; you have to activate the “right” knowledge (Samuelstuen, 2005; Cooper and Dunne, 2000; Bråten and Olaussen, 1999; Chouliaraki, 1998; paper 4). The same is true when organizing content or monitoring own learning: you must have insight into the criteria for evaluation of the specific context and content. The strategies must work according to the recognition and realization rules forming these, otherwise you will not be strategic.

As this research demonstrates, there are strategic (high-achieving) and unstrategic (low-achieving) ways of using CRISS, and deciding which to use correlates to a great degree with the pupils' social backgrounds. How social background relates to the school's code and recognition and realization rules may be described by the different social classes' *orientation to meaning*. As mentioned in the introduction, working- and middle-class children tend to differ as to whether they use context-dependent or independent principles (cf. Hasan, 2005). As demonstrated in this research, extracting principles and structure, and differentiating between context dependence/independence was difficult for low-performing pupils, as were the problem-solving methods.

Hence, as learning strategies are now highlighted in the OECD and Norway, many pupils will be exposed to and required to use a more complicated language about learning in school that they may not have access to due to their different orientations to meaning. When learning strategies are treated as content and context-independent knowledge, that is to say, as knowledge *per se*, it creates problems for both pupils and teachers because they cannot teach the relevance of this without relating to a specific meaning, realization and context (cf. the Bernstein quotation above). In other words, the problem in focusing on learning strategies as the CRISS project does, is that it fails to recognize the complexities inherent in teaching and learning due to the cultural orientation of school. Such a project thus tries to operate within a limited understanding of how learning occurs. Instead of relating to the diversity in the pupils' voices, the project insists on treating all students in the same way.

6.1 Conclusion

Based on the findings described in this paper, there is a rather clear relationship between achievement levels and social background when working with the CRISS project. This supports research on the relation between school achievement and social background in general (cf. introduction). An important hypothesis derived from the material in this study is that as the generic mode treats knowledge as *independent* of context, it may be difficult to appropriate this for lower working-class children, since they are often found to be more successful when using their own strategies *dependent* upon a specific context. The opposite may be true for middle-class children, as they tend to use strategies which are relatively *independent* of a specific context, and thus may relate more easily to this kind of knowledge. Bearing this conclusion in mind, I would suggest that focusing on learning strategies in the

CRISS project may not improve equity. Furthermore, if not treated carefully, it could contribute to a more stratified learning experience for low-achieving pupils (cf. Samuelstuen 2005; Chouliaraki, 1998). Since the evidence for the hypothesis presented here is not solid enough, however, this needs to be investigated more thoroughly.

However, based on the findings from this study, I argue that by employing perspectives from research in the sociology of education on learning strategies, a wider understanding of this field can be developed. A further question is, therefore, if and how a focus on learning strategies *could* be fruitful for low achievers. In relation to this, I argue that pupil failure in school has to be analysed and reflected on through a broader and more critical perspective, where these complex issues are not reduced to technicalities (see also Siegel and Fernandez, 2000; Bernstein, 2000; Hasan, 1995; Ares, 2007) as is done in the CRISS project. For further work on the school's role in improving equity, specific and explicit attention must be focused on the origin of the inequities. The question: *What would it mean to open up schools for voices traditionally not heard there* would have to be discussed in a more critical relation to meaning, forms of realization and context (cf. Bernstein above). Studying the relationship between the school's orientation to meaning and the pupil's orientation to meaning is crucial if we are to ensure equity in life-long learning.

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Acronyms

C = Classification, + = strong, - = weak, i = internal, e = external

CDA= Critical Discourse Analysis

CRISS=Creating Independence through Student –owned Strategies

ESCS = Index of Economic, Social, and Cultural Status

ESO = Educación Secundaria Obligatoria

EU = European Union

F = Framing , + = strong, - = weak, i = internal, e = external

OECD = Organisation for Economic Co-operation and Development

ORF= Official Recontextualizing Field

PRF= Pedagogic Recontextualizing Field

PISA = Programme for International Student Assessment

SES = Socio-Economic Status

TPS= Totally Pedagogized Society

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