

The Conceptualization of Education Equity in International Governance: A Discourse Analysis of OECD Documents

Minh Q. Huynh

University of Michigan, Ann Arbor, USA

Abstract

This paper approaches the issue of education equity, as reflect in the publications of the OECD (the Organization for Economic Cooperation and Development), from the viewpoint of Systemic Functional Linguistics. It employs discourse analysis as a methodological tool (Moss & Haertel, in press) to critically analyse the way OECD conceptualize education equity through part of its writings and publications, and to align the findings with the critiques commonly addressed at the organization. The study, besides aiming at an application of a relatively marginal methodological tradition, is expected to portray the complexities and discordances in the way OECD defines and approaches education equity on the one hand and the way it tackles the issue on the other, which in turn will draw insights and implications for equity policy study from an organizational theory perspective.

Keywords: OECD, education equity, discourse analysis, systemic functional linguistics, international education governance

1. INTRODUCTION

This study focuses on the issue of education equity and how it is portrayed in the work on education of the Organisation for Economic Cooperation and Development (OECD). Education equity has long been an issue of interest and concern in education reforms and policies in across all levels and contexts, from macro national and international (UNESCO, 1990, 2009, 2010) to the micro practices in schools and classrooms (Dumais, 2002; Lampert, 1999; Lareau, 2002; Rist, 2000). At the macro level, the emergence and growing influence of intergovernmental organizations (IGOs) following the era of economic development and international cooperation after the Second World War has resulted in growing policy convergence among nations, conceptualizing what came to be termed as “global education governance” (Bieber & Martens, 2011; Henry, Lingard, Rizvi, & Taylor, 2001; Samoff, 2003; Spring, 2008). It is frequently in the work of these IGOs that education equity is paid much attention to, and receives many criticisms. Among those, the OECD, with its peculiar characteristic of addressing education and equity from an economic perspective, has in recent decades risen in prominence in part due to the growing popularity of its international testing programs and its developing quantitative-based research body that aims at informing global education policy (Henry et al., 2001). It is this aspect of economic rationalization and ratification of education that both serves as the backbone of the OECD work and discourse on education equity and is the focus of the many critiques it receives on education equity, which will be examined in depth in this paper through the lens of discourse analysis.

The Organisation for Economic Cooperation and Development (OECD) is a group of leading world economies with a mission to “promote policies that will improve the economic and social well-being of people around the world” and an operational agenda that spans across many different social and economic issues (OECD, 2015a). Created in 1961 as a reorganization of the Organisation for European Economic Cooperation (OEEC), an intergovernmental organization founded to enhance economic restructuring in Europe after the World War, the focus of the OECD has, since the end of the Cold War, shifted to cover a broader range of issues besides economic and “reconstituted itself as a centre of policy expertise and comparative international data, based on its programmes of measurement, comparison and analysis” (Sellar & Lingard, 2014, p. 920). Today, with a member

base of 34 countries and economies and partnerships with many others on various aspects of its operation, it has become a key influence on world economic and social issues. In education, with its introduction of the Programme for International Student Assessment (PISA) in 2000, which by 2012 had attracted the participation of 65 countries and economies (OECD, 2013), the OECD has firmly established itself as the center of global educational governance, exerting, through its international testing and ranking system, its influences on education policy in not only its member states but non-members as well (Meyer & Benavot, 2013b; Sellar & Lingard, 2014; Spring, 2008).

Besides praises for this influence as an important step towards global transparency and data-informed policy-making, OECD's dominance in global education has also met with sharp criticisms. Among those are accusations that the organization is pushing a neoliberal agenda where individual states see declining power over education governance, and private corporations are gaining influence over decentralized administration and centralized global testing and goal-setting (Meyer & Benavot, 2013a), and that an international move towards standardization and increasing competition have exacerbated the limited opportunities of disadvantaged groups and pushed them further towards the margin (Alegre & Ferrer, 2010; Benito, Alegre, & González-Balletbò, 2014; Spring, 2008). Viewed in the larger landscape of social, political, and economic effects of globalization, the OECD's role on global education governance, intentionally or not, holds a significant impact on equity and quality of education.

The purpose of this study is to examine the concept of equity and its related semantic entities in some key OECD documents to (1) document how equity is conceptualized, rationalized, and addressed by OECD, (2) align such a conceptualization and rationalization with popular critiques on OECD and its work on education equity, and (3) attempt to explain that alignment in light of institutional and organizational theories. The findings of the project will hopefully shed light on and bring forward deeper understandings of whether there exists a discordance between the way OECD promote equity in education on the one hand, and the common critiques that its work often hinders and exacerbates education equity on the other.

2. METHOD

2.1 Data

Throughout OECD's publications, education equity surfaces as an important theme which is visited and revisited in varying breadth and depth in almost every of its published work on education. For the sake of specificity and recentness, after surveying many of those documents, I specifically chose three documents for analysis. The first is the second volume of the PISA 2012 report entitled *PISA 2012 Results: Excellence through Equity* (OECD, 2013). The second is the 2012 report *Equity and Quality in Education: Supporting Disadvantaged Students and Schools* (OECD, 2012). The third is the report on the 2014 International Summit on the Teaching Profession, entitled *Equity, Excellence and Inclusiveness in Education: Policy Lessons from Around the World* (Schleicher, 2014). This report was authored by Andreas Schleicher, the key architect of the PISA and head of the OECD Education Directorate. These three documents will serve as the corpus from which I will mine and analyse the concept of equity in education to address the three goals specified above. The criteria for selecting these three documents for analysis are (1) they are very recently published and thus reflect a rather official and up-to-date conceptualization and understanding of equity by OECD, and (2) they all deal explicitly with the topic of equity in education, in which sense the conceptualization may be more substantiated and focused. Because the main interest of this study lies in the ways OECD conceptualizes and rationalizes equity in education, only the parts of these documents that discuss specifically the conceptualization and rationalization of equity, namely the executive summary and chapter 1 of the 2012 PISA report (OECD, 2013), the executive summary of the 2012 OECD report on education equity and quality (OECD, 2012), and the executive summary and chapter 1 of the 2014 International Summit on the Teaching Profession report (Schleicher, 2014), were analysed. In this paper, the abbreviated references to texts in the corpus are as follows:

| | |
|---------|--|
| 2012-ES | Executive Summary of <i>Equity and Quality in Education: Supporting Disadvantaged Students and Schools</i> (OECD, 2012) |
| 2013-ES | Executive Summary of <i>PISA 2012 Results: Excellence through Equity</i> (OECD, 2013) |
| 2013-C1 | Chapter 1 of <i>PISA 2012 Results: Excellence through Equity</i> (OECD, 2013) |
| 2014-ES | Executive Summary of <i>Equity, Excellence and Inclusiveness in Education: Policy Lessons from Around the World</i> (Schleicher, 2014) |
| 2014-C1 | Chapter 1 of <i>Equity, Excellence and Inclusiveness in Education: Policy Lessons from Around the World</i> (Schleicher, 2014) |

2.2 Analysis

I approach these three policy documents from the standpoint of systemic functional linguistics, by which I employed theme analysis (Halliday & Matthiessen, 2014) and social actor analysis (van Leeuwen, 2008) to determine the information flow packaged in the thematic structure of the text in these documents, and the peak of dominance that these waves of information (i.e. *themes*, Martin & Rose, 2003, pp. 175, 177). The way intended thematic structures are used in discourse reveals aspects of periodicity, rhythm, continuity and discontinuity, and the desired portrayal of the prominence of social actors in the discourse (Halliday & Matthiessen, 2014; Martin & Rose, 2003). I took the clauses as the unit of analysis, categorizing their elements into themes and rhemes. Halliday and Matthiessen (2014, p. 89) give the following definition of *theme*:

The Theme is the element that serves as the point of departure of the message; it is that which locates and orients the clause within its context. The speaker chooses the Theme as his or her point of departure to guide the addressee in developing an interpretation of the message; by making part of the message prominent as Theme, the speaker enables the addressee to process the message.

From this definition of theme, I further categorize them into *marked themes*, whose principal function is to “signal new phases in a discourse: a new setting in time, or a shift in major participants” – in other words, “they function to scaffold discontinuity” (Martin & Rose, 2003, p. 179), and/or *unmarked themes*, which basically functions as the subject of the clause (Martin & Rose, 2003, p. 178). The *rheme* – or *new* in the way Michael Halliday calls it – is “a different kind of textual prominence having to do with the information we are expanding upon as text unfolds” (Martin & Rose, 2003, p. 179). It is in the recurrent choices for themes and rhemes that the discourse is packaged as phases of information. In this analysis of OECD documents, I aim to identify these recurring choices in order to unpack the phases of information in the discourse.

After the thematic analysis has been done, I proceed to code the text for equity-related participants, phenomena, and concepts. By measuring their frequency of appearance and in what thematic elements they are posited, I aim at unravelling the perspectival thinking behind the writing of the text, which will serve as evidence in alignment with the critical perspectives of OECD critics.

The second technique that I bring to the analysis is social actor analysis, which identifies the social actors – or participants of social practices – in the discourse. Characterizing discourse as the recontextualization of social practices (2008, pp. 4–6), van Leeuwen argues that it necessitates “a set of participants in certain roles (principally those of instigator, agent, affected, or beneficiary)” (2008, p. 7). The analysis of such social actors in these OECD documents will provide a glimpse into how these actors and their roles are portrayed, and how these portrayals reflect the way OECD conceptualizes equity. van Leeuwen (2008) provides a comprehensive framework for analysing social actors, out of which I will use a shortened version to produce my analysis. The shortened framework will identify social actors in terms of *inclusion* (whether the actor is included in the text, and within that inclusion, whether that actor is *activated* or *passivated*). *Passivation* also undergoes another level of analysis, which clarifies whether the actor is *subjected* or *beneficialized*. Social actors are also included in *circumstantialization*, where they are part of a circumstance in the sentence, or *possessivation*, where they are portrayed as owners of highlighted attributes. Where the actor is excluded from the text, the identification can be made in terms of *backgrounding* or *suppression*. Figure 1 below is a summary of the analytical categories used to describe social actors; for a detailed discussion, please refer to van Leeuwen (2008, Chapter 2).

The social actors identified in the analysis are OECD, PISA, (participating) countries and economies, governments, school systems (and system leaders), schools (and school leaders), teachers, students, and parents. For schools, I further identify advantaged and disadvantaged schools; for students, the categorization takes another level into identifying dis/advantaged and non/immigrant students.

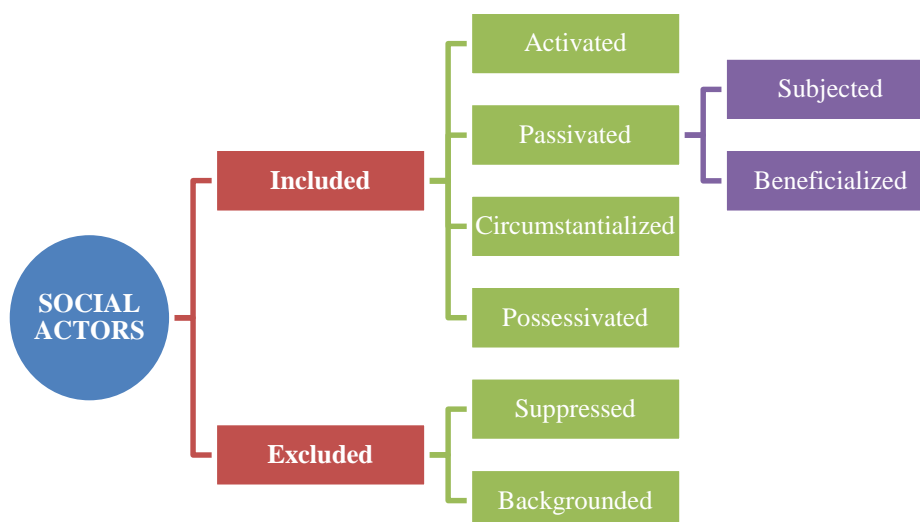


Figure 1: Analytical categories for social actors (adapted from van Leeuwen, 2008)

Examples from this study's corpus include:

- “More educated people [[ACTIVATION]] contribute to more democratic societies and sustainable economies” (2012-ES);
- “The way *education systems* [[PASSIVATION: SUBJECTION]] are designed can exacerbate initial inequities and have a negative impact on student motivation and engagement, eventually leading to [[EXCLUSION: BACKGROUNDING: *students*]] dropout.” (2012-ES);
- “In *these education systems* [[CIRCUMSTANTIALIZATION]], *the vast majority of students* [[PASSIVATION: BENEFICIALIZATION]] have the opportunity to attain high level skills, regardless of *their own personal and socio-economic circumstances* [[POSSESSIVATION]].” (2012-ES);
- Therefore, [[EXCLUSION: SUPPRESSION: *governments*]] investing in early, primary and secondary education for all, and in particular for children from disadvantaged backgrounds, is both fair and economically efficient (2012-ES).

The social actors identified in the analysis are OECD, PISA, (participating) countries and economies, governments, school systems (and system leaders), schools (and school leaders), teachers, students, and parents. For schools, I further identify advantaged and disadvantaged schools; for students, the categorization takes another level into identifying dis/advantaged and non/immigrant students.

3. RESULTS

3.1 Thematic analysis

The thematic analysis of the data yields interesting observations about the use of thematic structures within and across these documents. What stood out from the analysis was that each of the documents – and even each of the parts analysed within each of the documents – demonstrates different frequencies of occurrence for different actors and topics. Based on the common critiques usually directed towards OECD as pushing a neoliberal approach to education, by which are emphasized policy comparisons and global competition (Bøyum, 2014; Meyer & Benavot, 2013a; Owens, 2013; Spring, 2008), economization, privatization and marketization (Meyer & Benavot, 2013a; Spring, 2008), and the legitimization and exercising its soft powers through research and policy recommendations (Sellar & Lingard, 2013a), I have marked the occurrence of words and phrases related to these topics and tabulate the frequencies of their appearance within and across the texts of the corpus. Table 1 displays the proportion of the frequencies of their occurrence in relation to the thematic components within each text and within the whole corpus:

Table 1: Frequencies of occurrence of topics by thematic components

| | <i>n</i> | Equity | OECD/PISA | Countries | Statistics | Economic |
|----------------|----------|--------|-----------|-----------|------------|----------|
| 2012-ES | | | | | | |
| Marked theme | 44 | 5% | 0% | 2% | 0% | 2% |
| Unmarked theme | 74 | 1% | 0% | 1% | 1% | 1% |
| Rheme | 90 | 4% | 0% | 1% | 1% | 6% |
| 2013-ES | | | | | | |
| Marked theme | 36 | 3% | 0% | 39% | 3% | 0% |
| Unmarked theme | 43 | 2% | 2% | 16% | 14% | 0% |
| Rheme | 50 | 10% | 0% | 14% | 28% | 0% |
| 2013-C1 | | | | | | |
| Marked theme | 65 | 0% | 8% | 18% | 0% | 0% |
| Unmarked theme | 97 | 6% | 9% | 29% | 3% | 0% |
| Rheme | 105 | 15% | 9% | 6% | 3% | 3% |
| 2014-ES | | | | | | |
| Marked theme | 30 | 0% | 13% | 17% | 0% | 0% |
| Unmarked theme | 54 | 4% | 2% | 2% | 6% | 0% |
| Rheme | 63 | 6% | 5% | 0% | 0% | 3% |
| 2014-C1 | | | | | | |
| Marked theme | 50 | 4% | 10% | 16% | 0% | 2% |
| Unmarked theme | 75 | 9% | 1% | 9% | 13% | 3% |
| Rheme | 85 | 9% | 11% | 6% | 5% | 4% |
| Corpus | | | | | | |
| Marked theme | 225 | 2% | 6% | 18% | 1% | 1% |
| Unmarked theme | 343 | 5% | 3% | 12% | 7% | 1% |
| Rheme | 393 | 9% | 5% | 5% | 7% | 3% |

(%, texts and corpus, values greater than 10% highlighted)

It can be observed from this table that the frequencies for each of these topics and participants to be mentioned in the text are not significant compared to the number of thematic components. Only those with an occurrence greater than 10% are highlighted, among which the concept of *equity* and its related semantic entities (*equitable*, *equitably*, *equality*, etc...) surfaces in 15% of the 105 rhemes in 2013-C1 and less than 10% in other components and in other texts. However, despite their low occurrence, often *equity* surfaces in “the bigger waves” – the hyperthemes and hyper-rhemes, or topic sentences that precedes or concludes the main idea of a group of sentences (Martin & Rose, 2003, pp. 181–184), giving the concept a status of focus in the corpus. This suggests that the idea of equity is only approached in elaborating, explanatory and problematizing foci in this document, and very rarely in these documents does it come up as an issue of discursive importance or prominence (Martin & Rose, 2003, p. 177). Some example of the occurrences of the concept and its related words follow:

- [...] PISA also shows how *equitably participating countries and economies are providing education opportunities and realising education outcomes – an indication of the level of equity in the society, as a whole* (2013-C1);
- PISA defines *equity in education* as providing all students, regardless of gender, family background or socio-economic status, with opportunities to benefit from education (2013-ES);
- PISA also monitors *equity in education* by exploring the learning environment at school (2013-C1);
- The countries and economies participating in PISA demonstrate that excellence and *equity* are attainable under a wide variety of conditions (2013-C1).

OECD and PISA appears slightly less frequently, accounting for 13% of the 30 marked themes in 2014-ES and 11% of the 85 rhemes in chapter 1 of the same text [2014-C1]. Although the frequencies are quite modest, they reveal how OECD position itself as a legitimate source of research and evidence, with the marked themes being such reporting and introductory clauses as “PISA consistently finds that...” [2013-C1] or “as the OECD’s PISA assessment shows...” [2014-ES].

The most frequently-occurring actors in these texts are the countries and economies, which include both OECD members and non-members participating in PISA and its other programs. Words such as *countries*, *economies*, and the names of these countries account for 39% of all the 36 marked themes, 16% of 43 unmarked themes, and 14% of 50 rhemes in 2013-ES, 18% of 65 marked themes and 29% of 97 unmarked themes of 2013-C1. They also take up 17% and 16% each, respectively, of the unmarked themes in the executive summary and chapter 1 of the

2014 summit report. The frequent mentions of countries suggest a strong focus on comparative education and global competition, with most of the occurrences comparing and contrasting these countries' performance in education and in educational equity.

The reports also show a certain degree of emphasis on statistics and quantitative features, with statistical measures and information covering 14% of the 43 unmarked themes and 28% of the 50 rhemes in 2013-ES. This speaks to the observations by critiques that OECD, through PISA, is instilling a heavily quantitative approach to education assessment and reform (Sellar & Lingard, 2014), although this approach that they bring in does not necessarily resonate with national policy context (Bank, 2012; Bieber & Martens, 2011; Haugen, 2013). Interestingly, the economic focus does not surface as frequently as would be expected in the OECD discourse on education equity, accounting at most for 6% of the 90 rhemes of 2012-ES. Yet again, they are often found in hyperthemes and hyperrhemes, which thus bestows on them some level of significance in the discourse. This may be the issue that the critiques point to.

A closer look at the distribution of these topics among the thematic components within their occurrences reveals how they are preferably positioned by the authors to serve different discursive purposes. Table 2 details the proportion of the frequency distribution of actors and topics by thematic components, relative to the frequencies of their occurrences:

Table 2: Frequency Distributions of Actors and Topics by Thematic Components

| | Equity | OECD/PISA | Countries | Statistics | Economic |
|----------------|--------|-----------|-----------|------------|----------|
| 2012-ES | 7 | 0 | 3 | 2 | 7 |
| Marked theme | 29% | 0% | 33% | 0% | 14% |
| Unmarked theme | 14% | 0% | 33% | 50% | 14% |
| Rheme | 57% | 0% | 33% | 50% | 71% |
| 2013-ES | 7 | 1 | 28 | 21 | 0 |
| Marked theme | 14% | 0% | 50% | 5% | 0% |
| Unmarked theme | 14% | 100% | 25% | 29% | 0% |
| Rheme | 71% | 0% | 25% | 67% | 0% |
| 2013-C1 | 22 | 23 | 46 | 6 | 3 |
| Marked theme | 0% | 22% | 26% | 0% | 0% |
| Unmarked theme | 27% | 39% | 61% | 50% | 0% |
| Rheme | 73% | 39% | 13% | 50% | 100% |
| 2014-ES | 6 | 8 | 6 | 3 | 2 |
| Marked theme | 0% | 50% | 83% | 0% | 0% |
| Unmarked theme | 33% | 13% | 17% | 100% | 0% |
| Rheme | 67% | 38% | 0% | 0% | 100% |
| 2014-C1 | 17 | 15 | 20 | 14 | 6 |
| Marked theme | 12% | 33% | 40% | 0% | 17% |
| Unmarked theme | 41% | 7% | 35% | 71% | 33% |
| Rheme | 47% | 60% | 25% | 29% | 50% |
| Corpus | 59 | 47 | 103 | 46 | 18 |
| Marked theme | 8% | 30% | 39% | 2% | 11% |
| Unmarked theme | 29% | 26% | 43% | 50% | 17% |
| Rheme | 63% | 45% | 18% | 48% | 72% |

(%, per total occurrences, texts and corpus, values greater than 33% highlighted)

It can easily be recognized that words indicating countries and economies show up most frequently in these texts, especially in the 2013 report and 2014-C1. Of their 103 occurrences, they are prominently featured in the themes (82%), which highlights the prominence of looking and comparing across nations (marked themes) and their agency and ownership in the status of equity in reform in these countries (unmarked themes). Equity and related concepts also surface quite frequently, especially in 2013-C1 and 2014-C1, and within their 59 occurrences they are prominently featured in the rhemes (63%). This suggests that rather than being directly featured as a reform focus and a policy objective, they are more frequently approached in elaborations, (“[[the most advanced education systems]] now set ambitious goals for all students, with a clear focus on equity” [2014-C1]), explanations (“[[equitably participating countries and economies]] are providing education opportunities and realising education outcomes – an indication of the level of equity in the society, as a whole” [2013-C1]) and rationales for reform (“[[eliminating system-level obstacles to equity]] will improve equity and benefit disadvantaged students, without hindering other students’ progress” [2012-ES]).

Of the 47 appearances of OECD and PISA, almost half (45%) show up in rhemes, and are most often contextualized (“[...] performance in PISA” [2013-C1]; “[...] between PISA 2003 and PISA 2012” [2013-C1]) or possessivated (“[around] the OECD average” [2013-ES]). Their occurrences in marked themes, as discussed

earlier, serve to situate OECD and PISA as sources of expertise and legitimacy in education policy research, with the frequent use of introductory and reporting clauses to observed facts and statistics. Statistical data are presented predominantly in 2013-ES and 2014-C1. They are mostly featured in unmarked themes (50%) and rhemes (48%), mostly in comparisons (“[[the proportion of qualified teachers in advantaged schools (52%)]] is three times larger than the proportion of qualified teachers in disadvantaged schools (14%)” [2012-ES]) or complementing parts of facts ([more than half of all disadvantaged students, or 12.5% of the overall student population,] are resilient and perform among the top 25% of students across all participating countries and economies” [2014-C1]).

Although less pronounced compared to other actors and topical elements, the occurrence of economy-related items also shows an interesting pattern, in which they are prominently featured in the rhemes (72%). This feature mostly works to add an economic rationalization to emphasizing the importance of equity, with such examples as “[fifteen-year-olds] would contribute over USD 200 trillion in additional economic output over their working lives” [2014-C1] or “[access to early education]] not only contributes to equity, but is, in the long run, economically efficient as well” [2014-C1].

3.2 Social actor analysis

For the analysis of social actors, I applied the framework detailed earlier in this paper to highlight the functional roles each of them played in the sentence. The frequencies and proportions are then aggregated according to categories for each text. For the sake of brevity, I only include here the total distribution of the whole corpus and not for the individual texts.

Table 3: Social Actor Analysis of the Corpus

| Social actors | <i>n</i> | ACT | P-SUB | P-BEN | CIR | POS | SUP | BCK |
|----------------------------|----------|-----|-------|-------|-----|-----|-----|-----|
| OECD | 22 | 36% | 14% | 0% | 14% | 14% | 23% | 0% |
| PISA | 62 | 27% | 8% | 0% | 42% | 6% | 3% | 13% |
| Countries and economies | 157 | 22% | 2% | 1% | 54% | 10% | 5% | 6% |
| Society and people | 75 | 21% | 7% | 17% | 13% | 13% | 23% | 5% |
| Governments | 41 | 2% | 0% | 2% | 0% | 5% | 83% | 7% |
| School systems | 135 | 12% | 7% | 3% | 20% | 10% | 41% | 6% |
| Policies | 62 | 24% | 15% | 5% | 2% | 5% | 42% | 8% |
| Schools and school leaders | 130 | 10% | 17% | 14% | 25% | 22% | 6% | 5% |
| dis/advantaged | 36 | 14% | 14% | 17% | 42% | 8% | 0% | 6% |
| Teachers | 64 | 25% | 23% | 9% | 2% | 25% | 11% | 5% |
| Students | 354 | 18% | 12% | 11% | 6% | 25% | 19% | 9% |
| dis/advantaged | 39 | 26% | 8% | 26% | 15% | 18% | 8% | 0% |
| non/immigrant | 24 | 38% | 8% | 0% | 13% | 21% | 0% | 21% |
| Family and community | 31 | 10% | 6% | 13% | 32% | 32% | 3% | 3% |

(ACT: ACTIVATED; P-SUB: PASSIVATED—SUBJECTED; P-BEN: PASSIVATED—BENEFICIALIZED; CIR: CIRCUMSTANTIALIZED; POS: POSSESSIVATED; SUP: SUPPRESSED; BCK: BACGROUNDED, values greater than 25% highlighted)

The social actor most frequently mentioned in these documents are students, with 354 occurrences, and they are most often possessivated, which means they are more frequently referred to in the text by their traits and attributes, the most common of which being their performance (in the PISA tests and in schooling). They are also quite frequently suppressed, by which features such as “backgrounds” and “performance” are understood to refer to those of students. Students are only slightly less activated (18%) than they are passivated (23%) in the texts, which is quite interesting as the point of agency is usually less frequently attributed to students when they are often portrayed as beneficiaries of equity policies or actions. The main reason for students to be more actively portrayed in these texts is because of their roles relative to the PISA tests (scoring, participating in). When it comes to socioeconomic status and immigrant backgrounds, students are more often possessivated (18% and 21%), which means their ownership of such traits and characteristics is highlighted, and circumstantialized (15% and 13%), which means they are put together in comparisons (for example, comparing the difference in performance between disadvantaged and advantaged students, or between immigrants and non-immigrants).

Another more prominent set of actors are the macro level administrative constituents of education – governments and school systems, whose influence over education policies affects the equity status within countries. In these documents, they are more often excluded (83% for governments, 41% for school systems, and 42% for policies), with the policy actions frequently detailed in passive forms, or with (name of) countries being the associative terms for the suppressed or backgrounded governments and systems.

PISA and OECD are most frequently activated in the corpus, with 36% out of 22 occurrences for OECD and 27% out of 62 for PISA. This reinforces the idea, expressed in the thematic analysis, of establishing authority and

legitimacy as a global actor in education, and aligns with the critiques on the growing soft power of OECD in global education governance (Meyer & Benavot, 2013a; Sellar & Lingard, 2013a, 2014). PISA as a social actor is also more often circumstantialized, referring to the participation of students and countries in the program.

The next set of social actors involves countries and economies. As pointed out in the thematic analysis, the majority of their occurrences (54% out of 157) is circumstantialized, which serves the purpose of comparing and contrasting among them (“Across OECD countries and economies” [CORPUS]) and giving examples and evidences in specific nations (“In the United States, for example” [2013-ES]). The prevalent use of circumstantialization in reference to countries and economies signals a strong sense of competition, which critiques have often referred to as the global league-table craze fueled in part by OECD (Bøyum, 2014; Owens, 2013; Sellar & Lingard, 2013a).

Two other key actors in the school system, schools (and school leaders) and teachers are presented less frequently compared to students. Schools surface 130 times in the analysis, 25% of which provides the context for comparison or other focused actors (circumstantialization). The percentage is even higher when referring to advantaged and disadvantaged schools in general (42%). The agency of schools and school leaders in promoting equity and enacting equity policies is not as much emphasized, with 10% of the instances where schools are activated and 31% passivated, whereas for teachers, the sense of agency is a little clearer, with 25% of the 64 instances portraying them as agentic, while 23% also show them more subjected and 9% beneficialized of social practices.

Family and community surface least frequently among the broad categories of social actors, with 31 instances of occurrence. Out of these, they are more often circumstantialized and possessivated, which means they are referred to more as a trait of students (family background), or a circumstance in which they find themselves (the community they live in). It is demonstrated through the ways these reports are written that the roles of parents and community in promoting equity in education have not been adequately recognized.

4. DISCUSSION

4.1 Conceptualization of equity

Across the OECD documents examined, the concept of education equity surfaces quite consistent and uniformed. OECD employs a definition of equity made up of two dimensions of *fairness* and *inclusion*. In this definition, equity as fairness means that “personal or socio-economic circumstances, such as gender, ethnic origin or family background are not obstacles to educational success,” while equity as inclusion implies “ensuring that all students reach at least a basic minimum level of skills” (OECD, 2012, p. 15). Taken together, *equitable education systems* refer to those that are “fair and inclusive and support their students to reach their learning potential without either formally or informally pre-setting barriers or lowering expectations” (OECD, 2012, p. 15). This definition started out in the 2007 *No More Failure* report by OECD consultants (Field, Kuczera, & Pont, 2007), and has since been used with consistency in providing both an objective and a framework and for evaluating equity in OECD reports (OECD, 2012, 2013; Schleicher, 2014).

From the componential definition of equity in terms of fairness and inclusion, the equity problems highlighted in the reports mostly touch on either of these two aspects. More often, they discussed issues of fairness (personal and social characteristics, such as socioeconomic status, immigrant background, gender, school and systemic resources) in relation to inclusion (ensuring minimum achievement of skills) and performance problems (school failure, dropouts, achievement gaps). It is worth noting that the concept of inclusion is rather elusively portrayed in these OECD reports, and is often at odds with other related concepts, for (1) it is much less frequently addressed throughout the corpus compared to fairness, and (2) OECD did not clarify referentially the concept of “basic minimum level of skills,” which implies that (a) it leaves it entirely to member nations to determine through their national curriculum and standards, and thus renders it incomparable among nations, or, more convincingly, (b) it assumes the concept to operationally mean the baseline level of performance on PISA tests (Level 2), in which case it is a long way to go from the modest stipulation of being able to “read, write and do simple arithmetic” (Field et al., 2007, p. 2), especially when aligned with the more ambitious aspiration to “support [...] students to reach their learning potential” that surfaced later reports and publication. Such a vague definition of a key aspect gave OECD quite some room to attach it to the legitimacy of PISA as a global measurement of basic skills, coupled and enhanced with the economic rationalization of education discourse.

4.2 Neoliberal critiques

The way the discourse is presented in these reports aligns with some of the critiques tied to its pursuance of a neoliberal reform agenda (Bøyum, 2014; Meyer & Benavot, 2013a; Spring, 2008). Most clearly is the idea that OECD fuels intense global competition and competitiveness in national education reform agendas through the enforcement and legitimation of its PISA program, which includes, among others, cross-national testing, school ranking, policy research and national and international policy advocacy. Although OECD shy away from making education policy obligations for its members and participating countries, the soft power it builds up have exerted strong influences on national policy-making, and many of the national reform policies have placed a clear focus of improving performance in PISA assessments (Bieber & Martens, 2011; Bøyum, 2014; Owens, 2013; Sellar & Lingard, 2014; Takayama, 2008, 2013). The predominant featuring of countries in functional circumstantializations in the discourse gives reader a sense of the focus on comparisons and competitions across nations. Other aspects of neoliberal critiques, such as the economic rationalization of education, is reflected less obviously in the discourse, as the level of occurrence of economic concepts are not as prevalent in relation to other concepts and topics. Nevertheless, the way they are featured in the rhemes and meta-rhemes lends weight to their perceived importance, such as “[investing in equity in education and in reducing dropouts]] pays off” [2014-C1], or “[access to early education]] not only contributes to equity, but is, in the long run, economically efficient as well” [2014-C1]. The extent to which the economic interests characterize the equity discourse can be seen here both in light of a rationalization (more equitable systems provide more sustainable supply of human capital for economic development) and a ratification (investing in equity pays off). Furthermore, their abundant use of statistics and quantitative language in these reports somehow reveals an invasion of education policy research from a macro-economic perspective (Owens, 2013; Sellar & Lingard, 2013b).

As was the economization of education, the critiques that associate OECD with the privatization and marketization of education was not clearly ratified in the discourse, as OECD displays a certain amount of reservation in its evaluation of tracking and school choices as factors that might hinder and exacerbate equity (OECD, 2012, p. 10). The line of critique on standardization and centralization of goals (Bøyum, 2014; Meyer & Benavot, 2013a; Sellar & Lingard, 2013a), however, does resonate in the discourse, which demonstrates a heavy focus on the legitimacy and authoritativeness of OECD and PISA, the comparison and competition across nations, and the urge for and the dominant role of national governments in aligning education and equity policies to OECD research and policy recommendations, as stated in the analysis above.

5. CONCLUSION

The study, to a modest extent, has provided an analysis of the OECD’s more recent discourse on education equity from the perspective of systemic functional linguistics (SFL). Though immature in depth and incomprehensive in analytical attempts, it reveals how the OECD conceptualizes equity in education, how that conceptualization may be problematic, and how it aligns with the common critiques addressed at the organization. It also attempts to provide an explanation from the perspective of organizational theory, which captures the organization’s legitimate and functional goal in complex navigation between economic and egalitarian *raison d’être*. By bringing these different theoretical perspectives into view, the analysis of the discourse may begin to bear and yield new and different insights.

The study is admittedly unbarred from methodological and theoretical shortcomings. First, the data selection does not give a complete account of the OECD’s work on equity, especially since it does not cover a large part of its historical work in the past, which disconnects and separates the sample from the larger corpus and reflects a discontinuity. Second, the analysis did not explore other analytical tools, such as appraisal analysis (Martin, 2000) or genre analysis (Rose, 2012), which would undoubtedly have brought in more insightful and interesting findings. The social actor analysis, besides, did not employ the full framework introduced by Martin and Rose (2003), which made the coding process a little difficult and sparred with tough choices. There was not a second coder, which affects the reliability of the study. I also employed an open coding tactic, in which codes were developed, revised, and replaced in the process, the outcomes of which might have impacted the inner consistency of the coded corpus.

Approaching the questions from the various perspectives that I have been introduced to, I aimed at bringing them together in a coherent explanation of how the OECD discourse on education equity aligns with its critiques. Aware as I am about my own understanding of these perspectives and theories, I do not – and cannot – fully account for how my own assumptions, judgments and worldviews may interact and interfere with the analysis process. In a sense, the analysis was not barred from my view of power and political economic regimes, from my own knowledge and opinions of globalization and neoliberalism, and from my own care and concerns for education

equity as a national interest and policy objective, be it on a macro global standpoint, in a fully conscious manner. Doing the analysis, in return, has enlightened me with new understandings of the OECD and its organizational functions, the competing and conflicting goals that it must both carry as an economic club and as one bestowed with the privilege of addressing social justice and human development. The study also gives me insights into the notion of power and governance, especially from a Foucauldian point, by which the practices of power can be safely harbored in the discourses of governance and of ideologies, and can also be largely disconnected from it.

REFERENCES

- Alegre, M. À., & Ferrer, G. (2010). School regimes and education equity: some insights based on PISA 2006. *British Educational Research Journal*, 36(3), 433–461.
- Bank, V. (2012). On OECD policies and the pitfalls in economy-driven education: The case of Germany. *Journal of Curriculum Studies*, 44(2), 193–210.
- Benito, R., Alegre, M. À., & González-Balletbò, I. (2014). School segregation and its effects on educational equality and efficiency in 16 OECD comprehensive school systems. *Comparative Education Review*, 58(1), 104–134.
- Bieber, T., & Martens, K. (2011). The OECD PISA study as a soft power in education? Lessons from Switzerland and the US. *European Journal of Education*, 46(1), 101–116.
- Bøyum, S. (2014). Fairness in education – a normative analysis of OECD policy documents. *Journal of Education Policy*, 29(6), 856–870.
- Field, S., Kuczera, M., & Pont, B. (2007). *No more failures: Ten steps to equity in education*. Paris: OECD.
- Halliday, M. A. K., & Matthiessen, C. (2014). *Halliday's introduction to functional grammar* (Fourth Edition). London New York: Routledge/Taylor & Francis Group.
- Haugen, C. R. (2013). Comparing the OECD's and Norway's orientation to equity in their teacher education policies: Teacher autonomy under attack. *Journal for Critical Education Policy Studies*, 11(2), 166–202.
- Martin, J. R. (2000). Beyond exchange: appraisal systems in English. In S. Hurston & G. Thompson (Eds.), *Evaluation in text: Authorial stance and the construction of discourse* (pp. 142–175). Oxford: Oxford University Press.
- Martin, J. R., & Rose, D. (2003). *Working with discourse: meaning beyond the clause*. London ; New York: Continuum.
- Meyer, H. D., & Benavot, A. (2013a). PISA and the globalization of education governance: Some puzzles and problems. In H. D. Meyer & A. Benavot (Eds.), *PISA, Power, and Policy: The emergence of global educational governance* (pp. 9–26). Symposium Books.
- Meyer, H. D., & Benavot, A. (2013b). *PISA, Power, and Policy: the emergence of global educational governance*. Symposium Books.
- Moss, P., & Haertel, E. H. (in press). Engaging methodological pluralism. In D. Gitomer & C. Bell (Eds.), *Handbook of research on teaching* (Fifth edition). Washington, D.C.: American Educational Research Association.
- OECD. (2012). *Equity and quality in education*. OECD Publishing.
- OECD. (2013). *PISA 2012 results: Excellence through equity (Volume II)*. OECD Publishing.
- Owens, T. L. (2013). Thinking beyond league tables: A review of key PISA research questions. In H. D. Meyer & A. Benavot (Eds.), *PISA, Power, and Policy: the emergence of global educational governance* (pp. 27–49). Symposium Books.
- Rose, D. (2012). Genre in the Sydney school. In J. P. Gee & M. Handford (Eds.), *The Routledge handbook of discourse analysis* (pp. 209–225). London: Routledge.
- Schleicher, A. (2014). *Equity, Excellence and Inclusiveness in Education*. OECD Publishing.
- Sellar, S., & Lingard, B. (2013a). PISA and the expanding role of the OECD in global educational governance. In Heinz-Dieter Meyer & Aaron Benavot (Eds.), *PISA, Power, and Policy: The emergence of global educational governance* (pp. 185–206). Symposium Books.
- Sellar, S., & Lingard, B. (2013b). The OECD and global governance in education. *Journal of Education Policy*, 28(5), 710–725. <http://doi.org/10.1080/02680939.2013.779791>
- Sellar, S., & Lingard, B. (2014). The OECD and the expansion of PISA: New global modes of governance in education. *British Educational Research Journal*, 40(6), 917–936. <http://doi.org/10.1002/berj.3120>
- Spring, J. (2008). Research on globalization and education. *Review of Educational Research*, 78(2), 330–363.
- Takayama, K. (2008). The politics of international league tables: PISA in Japan's achievement crisis debate. *Comparative Education*, 44(4), 387–407.
- Takayama, K. (2013). OECD, “Key competencies” and the new challenges of educational inequality. *Journal of Curriculum Studies*, 45(1), 67–80.
- van Leeuwen, T. (2008). *Discourse and practice: new tools for critical discourse analysis*. Oxford ; New York: Oxford University Press.