

**Equity and education in cold climates,
in Sweden and England**

**edited by
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Introduction

Equity and education in cold climates: An introduction

Dennis Beach and Alan Dyson

This book is based on collaboration between two research teams. The first is the Centre for Equity in Education at the Institute of Education, University of Manchester in England. The second is the Department of Education and Special Education Equity Group at Gothenburg University in Sweden. The book has the ambition to critically address policies and practices related to education equity in the two countries. It is based mainly but not exclusively on qualitative empirical and policy research. It looks particularly at the apparent inabilities of education reform to deal with inequalities in the two countries. A number of themes are in focus:

- Educational inequality and policy interventions;
- The conceptual links between education equity and poverty;
- Identity and transition issues for young people and teachers in the past and present education economies of the two countries;
- Education and inclusion in terms of intersections of class, ethnicity, gender and disability;
- Governance issues;
- School leadership and social inclusion;
- Current priority policies.

These themes concern concepts, policies and practices of justice and equity in education. They are dealt with in the different chapters of this book, each of which tries to bring some clarity as to how and why education policy in different neighbourhoods and for different groups often results in uneven levels of educational achievement. The impact of these factors on the educational agency of young people is considered, as are the ways in which the development of education justice and equity involve processes that are enmeshed in relations that comprise education formation, contextualisation, re-contextualisation and interaction at the macro, meso and micro levels of our societies and the means by which young people are constituted as agents and subjects there. In this

sense the analyses in the chapters shift the focus of education policy analysis from national policy makers to community representatives, families, teachers, managers, administrators and young people in schools and back again (Raffo and Dyson, 2007). Methodological issues are considered in relation to this shift in each separate chapter. However, there is also a specific chapter on methodology addressing one particular but valuable approach to research on marginalisation and /or disability experiences from a life-world perspective.

Thus the chapters compare education and equity in two countries, but not always and only from exactly the same comparative matrix. Rather they are in a way each a unique case that represents how the author or authors have thought through and analysed equity in their national situations. The introduction and first three chapters play an important role in framing this endeavour as they attempt to provide a framework of concepts and ideas from which the other chapters can be considered. They offer definitions of equity to these ends. In this way these opening chapters thus provide insights into concepts, theories, ideas and perspectives for thinking about, analysing and describing justice and equity policies and practices.

One question that can be asked of a book such as this one, not the least given the individually distinct characteristics of the chapters, is can such a comparison of education and equity in the two countries still be effectively constructed and why is this comparison valuable? The answer we will give, hopefully substantiated later on by the chapters themselves and their messages, is yes. The comparison is possible based on the contributions at hand and it also has some very significant points to make. For instance Sweden and England both have social democratic traditions, but of different forms and strengths. Both of the countries also have historically developed education systems that embody many different forms of justice and equity, though with a strong emphasis on re/distribution, and both have had to deal with the consequences of moving to a (partially reconstructed) post-industrial economy, with heavy inward migration. These developments have produced new challenging economic demands for the education system and changing faces of management and professionalism (Dyson et al., 2011). They are often analysed as aspects of neoliberal ideology and an influx of new public management and have included a growing internationalisation of education in terms of common policy approaches and transnational target-setting.

What can this book provide that perhaps isn't accomplished elsewhere? There is after all no shortage of books and articles that consider and in some way compare policies and practices in the education systems of England and

Sweden respectively. Sweden has had extensive international influence in early childhood education for decades but not the least in recent years this influence has extended upwards through the education system through the Swedish concept of *friskola* (independent school) in relation to the introduction and development of Academy Schools in England and Wales. Research articles have analysed and discussed these issues. Examples include Ingrid Helgoy and Anne Homme's article from 2006 on 'Policy Tools and Institutional Change: Comparing education policies in Norway, Sweden and England' in the *Journal of Public Policy* (26(2): 141-165) and several articles in a recent special issue on education inclusion edited by Martin Mills, Sheila Riddell and Eva Hjörne (2015) in the *International Journal of Inclusive Education*. Articles such as 'Children's school achievement and parental work: An analysis for Sweden', by Magdalena Norberg-Schönfeldt in the *Journal of Education Economics* (16(1):1-17) can also be considered as can 'School Size Effects on Achievement in Secondary Education Evidence from the Netherlands, Sweden and the USA' by Hans Luyten in *School Effectiveness and School Improvement* (pp. 75-99) and 'Social capital and the educational achievement of young people in Sweden' by Alireza Behtoui and Anders Neergaard in the *British Journal of Sociology of Education* (2015). All of these articles have made contributions to our relative understanding of the education systems and experiences of education inclusion and equity in the two countries.

Reading from these examples England and Sweden are we suggest countries that compared to some others are relatively well set to respond to the demands of equity in changing global circumstances. Both countries are relatively affluent, have well-resourced education systems, and have a long history of efforts to infuse concerns with equity throughout those systems. However, new challenges have emerged recently as education policies have begun to swing away from an emphasis on equity as a primary goal and toward an educational agenda informed by concerns with economic growth, the development of human capital, and marketisation (Dyson et al., 2011). This agenda poses serious challenges to traditional notions of justice and equity which this book will explore. Particular political connotations have been identified across the countries. In both countries politics of inclusion and equity have broadly been promoted mostly from the Left of the political spectrum and have been challenged historically from the traditional Right.

Disposition of the book

The book comprises two sections. Section 1, Key themes and issues, and Section 2, Developing equitable practice: case studies from England and Sweden. Their respective contents are presented below.

Section 1 Key themes and issues

- Equity and education in cold climates: An introduction
Dennis Beach and Alan Dyson
- Chapter 1: Exploring the relationship between equality, equity and social justice in education
Kirstin Kerr and Carlo Raffo
- Chapter 2: Concepts of equity in Swedish society and education:
Historical perspectives
Girma Berhanu
- Chapter 3: Contemporary Swedish society and education: Inequities and challenges
Girma Berhanu
- Chapter 4: English society and education: historical and contemporary inequalities and challenges
Kirstin Kerr
- Chapter 5: Researching equity and inequity: The voices of marginalised people
Inger C. Berndtsson

Section 2 Developing equitable practice: case studies from England and Sweden

- Chapter 6: Formation of fundamental values in the Swedish education system—a discursive analysis of policy texts.
Inger Assarson, Ingela Andreasson, and Lisbeth Ohlsson
- Chapter 7: Using inquiry to shed light on and respond to inequities identified within a network of English high schools
Sue Goldrick
- Chapter 8: Constructions of student identity in talk and text: A focus on special educational needs in Sweden and England
Ines Alves, Ingela Andreasson, Yvonne Karlsson, and Susie Miles
- Chapter 9: Consequences of differentiated policies and teaching practices in the Swedish school system
Joana Giota and Ingemar Emanuelsson
- Chapter 10: Extending the role of the school: A case study
Harriet Rowley
- Chapter 11: Independent state-funded schools and system change: Addressing educational equity?
Maija Salokangas, Christopher Chapman, and Dennis Beach

Conclusions: Equity and education in cold climates: Tentative conclusions
Dennis Beach and Alan Dyson

The first chapter considers what equity can mean and how the education system might be explored in relation to these meanings, predominantly, in the recent era of neoliberal education politics. It aims to provide readers with a 'tool kit' of ideas about equity in the organisation of education systems and is followed by two chapters by Girma Berhanu that add to these conceptual discussions and give some outlines for the historical evolution of notions of equity in Swedish education and society. As the chapters make clear, in recent years, resource differences have widened among schools, among municipalities, and among pupils and these trends work against equity. They are happening at the same time as the rhetoric advocating one school for all and inclusive education has remained. The conclusions of the analysis are that although inclusion has been adopted as a policy goal, to date much of the Swedish debate has amounted to little more than the trading of abstract ideological positions with little connection to the daily realities in schools.

The next chapter is on education equity in relation to English society by Kirstin Kerr. Taking a historical and contemporary perspective on inequities and challenges, it describes the way in which distinctive notions of equity, often informed by a concern with social class, have figured in social and educational developments over the past hundred years, particularly in the second half of the twentieth century, where significant efforts were made to develop an education system that could counter the effects of—and ultimately reduce—social inequality. The chapter illustrates how these efforts have always been fragile and questioned, particularly in the last twenty to thirty years, as economic restructuring has shifted the emphasis towards a view of education for economic development rather than social equality.

Chapter 5, by Inger Berndtsson, is a methodology chapter on researching equity and inequity from a life-world perspective to more authentically capture the experiences of marginalised people. The examples given in the chapter are from people with visual impairment and blindness. It is followed by the first chapter in section 2, on the formation of fundamental values in the Swedish education system as seen through a discursive analysis of policy texts. This chapter, by Inger Assarson, Ingela Andreasson and Lisbeth Ohlsson, concerns a distinctive feature of the Swedish education system that seeks to operate on the basis of *värdegrund*—an explicit set of fundamental, equity-oriented values. The

chapter explores the reality of the concept based on a research project financed by the Swedish National Agency of Education.

Chapter 7, 'English schools tackling marginalisation', by Sue Goldrick, is linked to the chapter by Assarsson et al. but also reports on a somewhat different attempt to embed values of equity into schools. It is based on work by researchers at the University of Manchester with networks of schools in a collaborative process of inquiry aimed at understanding equity-related issues. Teams of school staff, supported by university researchers, have identified issues relating to equity in their schools. They have then explored those issues and taken action to address them. An attempt is made to develop a framework which might help schools to consider and work more effectively on inequities. The framework represents a way of conceptualising and responding to diversity in schools, which is also the theme of the chapter immediately following it.

Chapter 8, by Ines Alves, Ingela Andreasson, Yvonne Karlsson and Susie Miles, is about the increased diversification of classrooms in recent years and how this has placed additional demands upon teachers who strive to facilitate the learning and participation of all pupils. It reports from a range of research into processes of identifying, categorising and responding to the perceived individual differences of learners. Relatively sophisticated means of responding to individuals are described, but so too are processes of categorisation that are shaped by institutional and policy demands that have little to do with enabling individuals to flourish. The chapter concludes by considering whether mass education systems such as those in England and Sweden can ever hope to respond effectively to individual differences.

How systems have worked in these respects in one of these countries (i.e. Sweden) is looked at next, in the chapter by Ingemar Emanuelsson and Joana Giota. This chapter explores some of the consequences of inequality in special education practices. It has been developed from two longitudinal and nationally representative studies on the extent and forms of integrated as compared to segregated special education support offered to students in the Swedish comprehensive school over a period of twenty-nine years. The relations between support, background variables, and goal attainment in Grade 9 are presented. The analysis is based on data from 35,000 students born in 1972, 1977, 1982 and 1987 and from head teachers for older ($n=683$) and younger ($n=250$) students in the Swedish compulsory school. The results suggest that school problems are still seen as caused by student characteristics rather than shortcomings of

school and teaching. Equal opportunities for learning and growing in school are not supplied and pupils with SEN are still at serious risk of being marginalised.

Chapter 10 by Harriet Rowley is based on a case study of a community-oriented school in England confronted by the challenge of the poor educational outcomes of many learners there from economically poor families. The chapter differs from the former in terms of its case study approach and by specifically focussing on the perceptions of students and their families rather than on the views of professionals. It concludes by considering whether it is realistic to expect schools to intervene in non-educational issues and, insofar as this is possible, what kinds of conditions are necessary for such interventions to stand a chance of success.

In chapter 11, by Maija Salokangas, Christopher Chapman and Dennis Beach, specific challenges offered toward education equity are examined in relation to the recently emerging phenomena of independent and state funded school chains (ISFS) vis-à-vis Academies in England and so-called Free Schools (*Friskolor*) in Sweden. The development of federations or chains of schools is given particular attention. Empirical studies in England (Chapman 2013, 2014) are presented identifying the impact of ‘performance federations’ and ‘academy chains’ on student outcomes and in Sweden the relationship between education and profit is analysed.

The final chapter in the book is the conclusions chapter by Alan Dyson and Dennis Beach. This chapter opens by returning to the equity framework proposed in chapter 1 and considering the extent to which England and Sweden can be regarded as having equitable education systems. Some deep-seated commitments to equity are found. However, achievements are also undermined by countervailing tendencies towards elitist and human capital views of education embedded within neoliberal approaches to social and economic development. The differences between Sweden and England, and the successes—however limited—of policy makers and practitioners, suggest that alternative approaches to education justice and equity are possible, even if they are frequently limited.

(Re)conceptualising education justice and equity policy aims and possibilities

There are many questions that could be posed in relation to education justice and equity based on the chapters in the book and the conclusions we have drawn from them. These questions can be formed both in policy terms, in relation to outcomes and achievements, and as an ambition to initiate yet further

discussions relating to how concepts of education justice may be framed and what consequences this framing can have. They are about the possibility of justice and equity in education in the two countries.

When considering these issues of the possibility of justice and equity in education and society, and the viability of an educational politics for justice and equity, the suggestions of this book often revolve around the need to take head of complexity. Sharon Gerwitz's mapping of the field of education justice and equity in 1998 (Gerwitz, 1998) and her presentation of Marion Young's (1990) notion of relational justice is important to consider here, we feel, as is Terri Seddon's critique of Gewirtz (Seddon, 2003), and Nancy Fraser's (1997) perspective on distributional and representational justice upon which Seddon's critique of Gewirtz's analysis was primarily based. Carlo Raffo's (2014) book on educational justice and equity with respect to family, community, the geographies of space and place, gender and ethnicity, is also of value here.

These different works each belong to a tradition of justice research that is concerned with autonomy and agency in education politics and/or society, and how they impact on important identity processes and practices, in ways that can directly marginalise, psychologically constrain, and/or socially, politically and economically discriminate against particular groups. As do several of the chapters in the present book, they ask questions like why educational inequalities and injustices exist, how do they impact on the experiences and opportunities of young people, and what educational policy and practice responses have been implemented to deal with them. These questions help form a relational perspective on education justice and equity that accompanies at least two other approaches that are in a sense fused in the conclusions we have drawn: specifically 'rights based reasoning' about justice and a human capital approach that may currently be hegemonic.

We are in a sense then at least partially and cautiously optimistic about the possibilities of at least some limited advances in terms of justice and equity in our two countries. Some other perspectives question this kind of optimism however and strongly critique the very limited concept of justice and equity that is possible in societies such as ours (e.g. Cole, 2003). Our cautious optimism likens that of Gewirtz (1998) when she refers to Iris Young's Five Faces of Oppression as a starting point for thinking in these terms. These faces are: the Exploitation of the wealth that workers create through their labour power; the Marginalisation of those who are unable to keep steady employment because of for instance disabilities, education levels, age, discrimination and poverty;

the presence of Powerlessness and Cultural Dominance through one group's experiences, cultural expressions and history being defined as superior to others; and finally the use of Violence to keep a group 'in its place': this can be symbolic or repressive State-sanctioned violence, to enforce for instance racial segregation, break up strikes, or 'contain' crime within neighbourhoods that have been 'written off' by law enforcement. It may, according to Young, also include the relative social tolerance of public violence toward certain stigmatised groups based on race and sexuality. Reflecting on and acting in relation to these five faces of oppression for the 'participation and inclusion of everyone in educational and social life' will help us to better attend to the particular 'affiliations, feelings, commitments and desires of marginalised groups'.

This is a message that is also operating throughout the present book. It requires us to address the complex nature of justice and equity from both distributive and relational positions, without ignoring the historical, political, economic and cultural (including legal) legacies—i.e. structures—that inform, inhibit, and or extend, the heterogeneous agency of individuals in different ways (Dyson et al., 2011). It involves valuing the autonomy of individuals in all its diversity and difference whilst also recognising that autonomy is part of a broader civic context of material history that constrains individualistic cultural relativism and 'pure' notions of autonomy and choice. As Raffo (2014) notes, agency depends on both individual circumstances, the relations people have and/or are able to form with others, their capabilities to recognise agentic possibilities and mobilise their agency in their own interests, and the social, cultural and economic conditions and contexts within which potential obligations, options and freedoms can and should be achieved. And this is a problem. Justice and rights to equity may still be subjected to bourgeois limitations and bourgeois notions of just deserves, and these are extremely class and racially biased as well as strongly shaped by a hegemony of difference and able-ness that diminishes the educational opportunities of people with physical and or mental disabilities.

Thus, according to the chapters in this book the measure of justice and equity in education should not only be made in terms of equal access to distributed resources. It should also be about history, structural relations, political decisions, attitudes, hegemony, and the availability of pedagogy and a curriculum that will build onto the experiences and understandings of all young people, without marginalisation, by providing possibilities to develop and engage fully in their learning. Researching justice and equity in these circumstances involves studying, describing and theorising about how learning contexts, both inside

and outside school, may or may not challenge recognisable faces of oppression. It involves researching how education systems and practices differentially generate constrained sets of educational expectations and constrained sets of educational possibilities and trajectories (Dyson et al., 2011; Raffo, 2014).

Researching educational justice and equity should perhaps therefore involve examining not only redistribution but also how agentic developments and rights are mediated and restrained by material, cultural, social and psychological experiences within school, beyond school, and by the relationships of the Law and place and space that link the two together in the media, common sense, social conventions and limitations. This implies researching the ways in which the particular concerns of groups or individuals on curriculum content or forms of assessment and management are negotiated. It concerns the possibilities and restraints of an *enlivened and agentic justice from above and below*, that aligns with a policy emphasis on process, autonomy and aspiration, of a kind that can enhance a range of real agentic alternatives and commitments for expanding and developing the diverse educational capabilities that can provide all young people regardless of class background, gender, race, ethnicity or definitions of able-ness with the right to core intellectual engagement in/through advanced schooling. Just giving equal shares of time or money will not compensate for the unfairness of existing social and educational arrangements. Redistributions are a compromise, and they always have been. Changes to the social order and currently alienated social relations in education and culture might make a difference. But this kind of 'revolution' is probably not economically feasible or socially possible today. Research on and for education justice and equity may well be research that analyses if and how a revolution of/in learning can occur, what might characterise its preconditions, and what the forms of its main logically necessary and unnecessary contradictions may be.

Chapter conclusion

In concluding the introduction we have to say that the class divisions in England and Sweden have remained very powerful, despite decades of policies for so-called democratic and inclusive education, and many groups are not only at risk of increasing social exclusion, but also of increasing economic exclusion. Moreover, our education systems seem to be becoming more polarised today at the same time as they also seem to be fracturing horizontally into schools that confer systematically differing amounts of cultural and social capital to their clientele. As Kerr suggests in this volume, differences in assessment related to

family income, father's occupation and mother's education widen at each stage of the education system and children with a higher social class background who start with a low assessment of relative cognitive ability when young eventually overtake those with a lower social class background who were initially assessed as having high ability. Poor educational outcomes are also typically concentrated in areas where other forms of disadvantage are concentrated, with this leading to pupil populations with high levels of disadvantage (Raffo and Dyson, 2007). Rather than offering a route to social mobility our education systems are still reproducing inequality. They disadvantage learners with less immediate access to the conventional forms of social and cultural capital.

Chapter 1

Exploring the relationship between equality, equity and social justice in education

Kirstin Kerr and Carlo Raffo

Introduction

This chapter has two main purposes. The first is to explore what the terms equality, equity, and social justice might mean in relation to education, and how those terms relate to one another. This is complex because often they are used interchangeably without perhaps fully appreciating both their differences and their connectedness. The second is to consider how the education system might be explored in relation to notions of equality, equity and social justice. Such ideas have influenced different aspects of the education systems in England and Sweden and elsewhere, for example: structural arrangements, in terms of how education systems are organised and how learners gain access to those systems; the educational processes learners experience; and what are seen to be the most important outcomes of education, such as examination results, personal development and well-being, and employability.

In addressing these issues, this chapter aims to provide readers with a range of ideas about equality, equity and social justice which they can use to critically explore their own thinking, particularly in relation to how such issues might be embedded in wider school and societal contexts. As UK-based researchers, our examples are drawn largely from England and the literature we draw upon is English-language literature. However, as other chapters in this book demonstrate, there are similar issues in Sweden and the framework we offer is, we suggest, widely applicable. On the other hand, the chapter does not seek to engage fully in the complex philosophical debates surrounding notions of equality, equity and social justice (for a more extensive discussion see Raffo, 2014). Rather it aims to present readers with some of the main ideas put forward by key thinkers, and then to explore how these ideas—albeit presented here at their most basic—can be used to help unravel educational debates and dilemmas. For example, is creating a socially just education system about providing all learners with the same education insofar as possible, and so emphasising equality? Is