

ENACTING EQUITY IN EDUCATION

Enacting Equity in Education – Towards a Comparison of Equitable Practices in Different European Local Contexts presents social aspects of the educational policies of the end of the 1990s and the early 2000s in different European countries. Today, the traditional egalitarian ethos and structure of the elementary schooling is being challenged in different ways by the arising managerialism in educational institutions. Equality is regarded by the authors as a dimension of social justice which is worth striving for as a basic condition for the democratic sustainability of the society. The book presents different approaches and practices in the pursuit of equity in education. The cases are from Belgium, Britain, Finland, France and Sweden.

This book is the outcome of a working group coordinated by Örebro University, Sweden. The group included researchers from different European countries.

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Research Centre for Social Studies Education
University of Helsinki

ENACTING EQUITY
IN EDUCATION

LÁZARO MORENO HERRERA
GRAHAM JONES • JUKKA RANTALA (eds)



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IN DIFFERENT EUROPEAN LOCAL CONTEXTS

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EQUITY IN EDUCATION?

Enacting equity in education has increasingly become a common concern for practitioners and policy makers across Europe. The interest goes from a focus on inequities to the analysis of positive attempts to achieve equity in the different educational systems (e.g., Moreno Herrera & Francia 2004). However, the efforts towards a more equitable education in different local contexts are strongly conditioned by local histories, present particularities and specific notions of social justice; analyzing, evaluating or comparing these different efforts across borders is indeed difficult.

If we share the perspective that these differences are not surprising considering their cultural origin and plural nature, and taking into account that they only make sense in relation to people (Pepin 2004), the question is then: What does this implies for studies of such an intricate and salient issue as equity? One could argue that the acknowledgment of the existence of different notions of social justice, having different facets and different tensions, increases the complexity but also the richness of the enquiry and the debate on equity in education. Gewirtz (2004) adds also a dimension that is crucial to consider in analysis of equity across borders: enacting equity is not just an issue of what is desired but mainly of what is possible in specific local contexts.

The articles in this book explore and highlight different aspects, tensions and perceptions of equity in education in three distinctive contexts: (a) France and French-speaking Belgium, (b) England, and (c) Scandinavia (Sweden and Finland).

The articles are underpinned by an interest in how equity can be achieved in real world situations. They also 'share' a conceptual framework which is concerned with the mediated nature of equity practices and their level and context dependence. The articles has also the specific purpose to provide a more detailed perspective of the different understandings of equity, the different constraints on equity and the different possibilities of enacting equity in education in different European contexts. It is also expected that this understanding could be used to inform more sophisticated comparative theories and evaluations of equity in education.

In the first article Lázaro Moreno Herrera examines an aspect that is crucial for cross national studies of equity in education: the methodological dilemma. Finding or designing methodological 'tools' to adequately study equity in different contexts is particularly difficult but indeed needed. He argues that despite the influence of different cultural identities and educational histories, a considerable likeness is to be found in the conceptual approach to equity in educational research in different contexts. The methodological approaches are, however, substantially different. He identifies three approaches or focus of attention in studies of equity largely bounded to methodological positions; these approaches are: practices, curriculum, and indicators. The articles in this book largely reflect the methodological diversity that Moreno Herrera refers to.

Vincent Dupriez analyses the political initiatives in French-speaking Belgium, to reduce grade retention in primary schools and its implications for equity. The main goal of this reform is said to battle the social selection observed with grade retention and to increase equality of opportunity and equality of results at school-leaving. The analysis that he makes of primary-level teachers' perceptions and practices highlights how much this reform conflicts with teachers' spontaneous conceptions of equality. Different meanings of equality

are presented and discussed in this article; competition between schools in a quasi-market environment is argued to be an obstacle to the egalitarian school project.

The article by Françoise Crepin, Marc Demeuse, Monique Jehin and Anne Matoul looks at different aspects behind the positive discrimination in education in the French community of Belgium. It draws on the fact that since 1998, the French Community of Belgium has had a very systematic way to identify the compulsory schools which could receive extra means based on a formula related to socio-economic characteristics of each school's population. The article introduces a small scale study on schools which are rejected by this general formula. It tries to identify the nature of new indicators suggested by these schools and the possibility to add such indicators to the general formula, according to the philosophy of positive discrimination mechanisms. The article also present and analyse the types of solutions that are proposed by the school staffs in order to secure for each pupil equal opportunities of social emancipation, according to the law.

Servet Ertul's article focuses on the creation in France, in 1987, of the vocational 'baccalauréat' with the aim to democratize and generalize high school education. According to Ertul, its creation was supposed to complement the existing general 'baccalauréat' leading to long higher education and the technical 'baccalauréat' leading to short higher education. The article is drawn on interviews of school head teachers. His contribution assesses the scope and limits of the attempted equity policies in education. Ertul argues that the geographical location of vocational schools often reflects the spatial segregation which in turn mirrors a social and cultural segregation.

Maroussia Raveaud examines in her article teachers' assessment in primary schools in England and France in order to explore the conceptions of equity that underlie practice in both contexts. She considers the tensions between the levels of government policy and classroom practice, and highlights culturally embedded understandings of equity across two national contexts. Potential tensions arise between competing teacher priorities, and between

official policy, teachers' values, and perceived children's needs. She argues that although French and English teachers express similar concerns for equity, the range of practice available in mainstream education was constrained by cultural, political and educational traditions, making actual practice highly context specific.

The article by Sirkka Ahonen analyzes the role of the representative democracy and the civil society in Finland in the running of the school politics, from the comprehensive reform of the 1960s to the marketisation of the school in the 1990s. Free and public basic education, a common school, was one of the central parts in the political agenda in Finland during the 20th century. The project of equal opportunity through a comprehensive basic education was carried out by the builders of the welfare state after the World War II. A change took place in the end of the 1900s, when new school political actors questioned the pursuit of educational equality; Ahonen argues that instead, an individual opportunity approach was to be followed by the schools.

Guadalupe Francia examines the conflicts between the National Agency for Education in Sweden and fourteen municipalities in the process of approval of the establishment of the 'independent schools'. She argues that these conflicts exemplify the redistribution-recognition dilemma present in the concepts of equity, social justice and equivalence. For some actors the opening of independent schools is an instrument to develop diversity and cultural justice. For others, the growth of independent schools is seen as the gradual disappearance of public schools as a common sphere to all citizens. According to her analysis, there is a risk to have higher segregation and inequality in Sweden by closing or reducing common public spaces. Her article claims that the analysis of the redistribution-recognition dilemma is necessary in order to create awareness of the limitations to the right to equality imposed by what is meant to be an increasing of educational diversity.

Finally, the article by Maria Olson examines the concept equivalence, regarded as central in contemporary Swedish education policy. According to Olson, one important aspect in the Swedish

educational policy is to describe and determine the schools assignment in fostering democratic citizens. The concept of equivalence, hence, plays an important role in this policy-making practice. Olson refers to the fact that in the 1990s equivalence is challenged by another concept: 'freedom of choice'. In her article possible effects of this changed conceptual framework in the education policy are analysed with specific attention to the political understanding of a democratic citizenship. According to Olson the challenge posed by 'freedom of choice' to equivalence contributes to a change in the political understanding of a democratic citizenship in Swedish education policy in at least three aspects; the political participation (from co-acting to re-acting), the political activity (from directing to voting) and the political role of the citizen in society (from designer to a consumer).

Together, these articles acknowledge the need for further studies of different dimensions and tension associated to the enactment of equity in education. They also contribute to develop a deeper understanding of the comparative (methodological as well as substantive) and theoretical issues involved in studies of equity in education.

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EQUITY IN EDUCATION ACROSS BORDERS – WHAT ARE WE INVESTIGATING AND DISCUSSING?

ABSTRACT

Equity is currently a concern and a subject of discussion for policy makers, researchers and practitioners in different educational contexts. Earlier research highlights that notions of equity are influenced by historical, social and cultural factors; at the same time different sociological theories allows arguing that it is possible to identify 'aspects' which might help to consider particular educational policies and practices as more or less equitable. The article analyses current research with a focus on equity where three main approaches are identified. The first is practices, where the enquiry focuses mainly on what is possible and implemented in specific settings and the tensions associated. The second is curriculum theory, where notions of equity are analysed using discourse and text analysis following a historical perspective. Finally, the approach focused on indicators gives particular attention to parameters that are used to argue whether specific policies and practices are equitable or not. The article opens for discussion the challenges and the possibility for the identified approaches to converge in cross-national comparative studies.

Introduction

Equity, as an overall concern associated with social justice is currently a focus of attention and a subject of discussion for policy makers, researchers and practitioners alike in different educational contexts. The complexity of the discussion increases when it crosses national boundaries and the frameworks of national educational systems. One of the elements at the basis of such complexity is the different ways of perceiving social justice. Pepin (2004, 226) notes that “interestingly, but not surprisingly, notions of social justice are perceived differently in different countries”. She argues further that not “only do different countries perceive notions of social justice differently – at one moment in time – but notions also vary over time”. The cultural origin, the plural nature, and the fact that these notions of social justice only make sense in relation to people are presented as explanation of this diversity. In addition it is considered relevant to notice that

Cultural identities come from somewhere, have histories. But [– –] far from being eternally fixed in some essentialist past, they are subject to the continual play of history, culture and power [– –] identities are the names we have to give to different ways we are positioned by, and position ourselves within, the narratives of the past. (Hall 1993, 394, cited in Pepin 2004, 224.)

The use of the term *equity* in the educational discourse (research, policy making and practices) is in itself strongly influenced by such factors. In an earlier discussion of the differences in conceptualization of equity I also argued for the need of studies of equity to consider a range of aspects from linguistic, cultural and the history of education with particular attention to curriculum changes over time (Moreno Herrera 2003).

The aim of this article is to contribute to further discussion about the possibilities, theoretical and methodological challenges for cross national studies on equity. I intend to do this by analysing the research in the area. This contribution is made with a strong belief in the need for these kinds

of studies. The scope of the analysis is limited to mapping the discussions mainly in the European context and leads to the identification of main methodological approaches in research. The analysis is largely based on contributions and discussions on equity during recent years.¹ A discussion of the validity of the analysis in other contexts where relevant research on equity has been conducted, such as Australia (Seddon 2003), is not within the scope of this article. There is no intention to discuss here the limitations, or not, that each of the identified approaches might have but rather to analyse their main features.²

Sociological approaches to equity

In an earlier contribution I argued for the relevance for cross national studies on equity in education to start by ‘locating’ the discussions within major frames of sociological research (Moreno Herrera 2003). This, from my perspective, will lead to a better understanding of the debates on equity in different educational contexts and is very much supported by earlier analysis of different dimensions of social justice in education (Vincent 2003).

An important framing of the discussions on equity is presented by Benadusi (2001). He identifies four main sociological approaches which demonstrate the complexity of cross national studies. According to Benadusi (2001, 25–64) these approaches are:

- the functionalist approach,
- the social or cultural reproduction theory,
- the cultural relativist and pluralist approaches,
- the methodological individualism approach.

¹ I have based most of my analysis and the identification of these main approaches or focus of attention on a review of the contributions of different colleagues from countries across Europe to the two workshops on educational policies and equity held at Örebro University, Sweden, 2002–03. Research works done by these colleagues in connection to other forums or projects has also been very valuable for the analysis. To all of them, referred or not in the article, my gratitude!

² This contribution is part of the project *What about equivalence?* carried out by a research team at Örebro University sponsored by the Swedish Research Council.

Benadusi (2001) locates the origin of the functionalistic approach within the research tradition represented by Durkheim and Parsons. Educational inequalities are considered to be based on two kinds of factors. First the so called “ascriptions factors” such as social class, gender, ethnic group or nationality. Second the “achievement factors” identified, on the one hand, with “personal natural” endowment and, on the other hand, with the will of the individual to use and develop this endowment. From the perspective of the social or cultural reproduction theory, represented by Bourdieu and others, educational inequalities are explained entirely by social inequalities. The concept of cultural capital is in this context used to explain the broad range of academic success of the individual. The grounds of what Benadusi calls the “cultural relativist and pluralist approach” are located within the phenomenological and ethno-methodological or interactionist paradigm represented by Mehan, Young and Whitty. Within this approach there is “a strong emphasis on agency with respect to the construction of the social world”. According to this approach “school does not simply ratify externally generated inequalities, but also produce or actively reproduce inequalities thereby damaging some groups” (Benadusi 2001, 32). Finally, Benadusi claims that the approach of methodological individualism represented by Boudom and Coleman places the individual at the centre of the as “an intentional and rational actor”; the choices made by the individual are influenced by social constrains but not completely determined by them.

These four broad sociological approaches, each represented by relevant scholars and having strong advocates do not only reinforce the mentioned complexity of cross national studies but also, suggest the need to have a broad conceptual and methodological base when dealing with issues of equity in education even within national boundaries (cf. Moreno Herrera 2004).

Educational approaches to equity

The analysis earlier presented has important implications for the discussion of equity in education. However, the examination of the research in the educational field with equity as a focus allows identifying three specific approaches and methodological patterns within these studies which are discussed in the following.

Equity approached from practices – “context of enactment”

While welcoming a plural conception of social justice in current writings, Cribb and Gewirtz (2003) presents a concern which is indeed quintessential to the approach of equity based on the analysis of practices. Cribb and Gewirtz (2003, 15) draw the attention to the fact that in these writings

[– –] social justice is viewed as having a variety of facets. For example, it is viewed as simultaneously concerning the distribution of goods and resources on the one hand and the valorisation of a range of social collectivities and cultural identities on the other. Whilst we want to welcome the use of such a plural conception of social justice, there is, we want to suggest, a failure in much of this work to appreciate fully the implications for sociological analysis of such plural conceptions of social justice. This is reflected in two tendencies [– –]. [T]he first tendency is a common failure to engage adequately with the tensions that may arise between different facets of or claims to social justice [– –]. The second tendency is what we call ‘critique from above’. This is the tendency to treat the work of sociological, analysis as something which takes place at a distance from or above the realm of practice.

A further development of the statements presented here by Cribb and Gewirtz (2003), and in an earlier work by Gewirtz (1998), is to be found in *The Managerial school* (Gewirtz 2002). Much of the study

draws on data collected via ethnographic studies in schools of London; Gewirtz (2002, xii) argues however that even though London schools may have different features in relation to schools in other contexts the study might have a wider applicability.

While claiming in a recent contribution for the need for the studies on equity to focus primarily on practices Gewirtz (2004a, 26) first rejects giving an abstract conceptualisation of what should be counted as equity in education against specific educational system, institutions and policies and in the following remarks that “what I want to do is to argue that it is not possible to resolve the question of what counts as equity in education at a purely abstract level, and that what counts as equity can only properly be understood within its contexts of interpretation and enactment”.

In consequence the need to focus on practices or to contextualise judgments about equity is supported by three interrelated arguments. The first related to an attributed *multi-dimensional and internally conflictual nature of equity* at abstract level. The second argument is the need to recognize the *mediated nature of equity practices*, and finally an assumption that what count as equity *is level and context-dependent* (Gewirtz 2004a, 26–27).

From the perspective of practices there is, according to Gewirtz (2004a, 26), a need to consider first the “context of interpretation and enactment”; this is based on the assumption that equity can have different meanings which might be in tension with each other. To pursue policies or practices that can be termed as “purely egalitarian or purely equitable” is from this perspective considered “unrealistic” as pursuing a particular dimension of equity will “neglect or scarify” others. It is then considered essential to “engage in concrete practical dilemma and not merely abstract conceptualisations”. Based on a case study where one of the actors (a teacher) is committed to equitable practices, Gewirtz notice the existence of other concerns in tension with this commitment; the analysis of the tensions involved leads her to claim the need to recognize the “mediated nature of equity”; she argues that

we can only understand equity within its contents of realization [– –]. [E]quity concerns are always in practice likely to be mediated by other kinds of concerns that motivate actors. There are two kinds of concerns [– –] a) other norms that are not concerned with equity but which might in practice compete or conflict with equity concerns; and b) constraints over which agents have little or no control, for example, dominant discourses or power relations, or legal or economic constraints. (Gewirtz 2004a, 26–27.)

Drawn also from the same case study is also the notion that “different practices are appropriated and possible at different levels and in different context of action”. These possibilities vary depending on the various degrees of autonomy of the different actors, e.g. policy makers, trade unions and teachers (Gewirtz 2004a, 37). In an analysis that might also be of relevance in relation to the use of indicators in research in equity, Gewirtz (2004a, 27) argues that

the relevant equity issues or criteria may be different, be mediated differently and therefore need to be dealt with differently from the different vantage points of policy makers, managers, teachers or social workers. Furthermore, within each of these occupational groups there will be differences in terms of what is possible and/or desirable according to different national, regional, and/or local contexts.

With the focus of attention on the institutional level and the practices associated with equity, the analysis made of the role of specific actors, i.e. educational leaders (Jones 2004), follows patterns of argumentation similar to the one presented here by Gewirtz (2004a). The changing role of the school leaders from that of leading professionals, to the management of government policies and procedures (Jones 2004) supports further the assumptions made by Gewirtz about the multi-dimensional and internally conflictual nature of equity at abstract level, the need to recognize the mediated nature of equity practices, and finally that what count as equity is level and context-dependent.

The research on equity in education with focus on the analysis of practices which has been presented here based on the contribution of Gewirtz and co-workers has also an important legacy when it comes to its methodological implications. In arguing for this contextualised approach to the understanding of equity Gewirtz concludes by sketching a method expected to contribute into allowing us “to read and evaluate claims about equity in education”. The method in question involves:

- a) looking at the multi-dimensional nature of equity,
- b) looking at the tensions between different dimensions of equity,
- c) being sensitive to the mediated nature of equity practices,
- d) being sensitive to differences in the contexts and levels within which equity is enacted. (Gewirtz 2004a, 38.)

A main tenet in the approach to equity through analysis of practices could be summarized with the following statement: “judgments about what count as equity in education cannot be divorced from judgments about what is possible” (Gewirtz 2002a, 38). The specific focus on practices in studies of equity, as presented here, has far reaching implications and increases the challenges for cross national studies. This is particularly the case for what Gewirtz (2004b) considers central issues and dilemmas for educational researchers concerning the expectations of different actors on the outcomes of research.

Equity, approached from the perspective of curriculum theory and discourse analysis

Most of the research completed in Sweden and Finland with particular attention to the evolution of the interest in social justice, including equity, and its various understandings and expressions in curriculum is associated with the work of Englund (1994a, 1994b, 2004), Ahonen (2004) and other researchers (Francia 1999, 2004; Virtanen 2003; Wildt-Persson & Rosengren 2001). While, on the one hand, Wildt-Persson and Rosengren (2001) try to provide an understanding of

the “the Swedish notion of equity” by making an historical analysis of the concept, Englund (2004), on the other hand, focuses on the concept of *equivalence* and discusses it in terms of its “performative displacement”. Englund draws the discussion based on analysis of curriculum evolution in Sweden over the last few decades using discourse analysis and a “critical pragmatic perspective”. Having the performative displacement of equivalence as central notion, Englund (2004, 129) argues that:

If we consider this from a more long term perspective, displacement deals with the fact that the substantial meaning and contextual criteria involved in the concept has changed from consisting of types of goals such as unity, common frames of reference, and equal value of continued studies to a situation where supplementary goals have been added; these are often vague and in total opposition to the original goals. These new goals can accept difference and individuality independently of shared frames of reference. These new goals have also become equivalence’s link to freedom of choice and parents’ rights.

From this perspective Englund questions the elements motivating a study of the concept of equivalence in Swedish educational policy; Englund (2004, 126) answers by assuming that:

It is primarily the fact that in recent times the concept has assumed an increasingly important role in shaping educational policy, as well as featuring in the general discussion about schools. In both cases the actual idea of equivalence has changed, but its original positive characteristics have remained constant.

It might be good at this point to briefly refer to what could be seen as ‘inconsistency’ in the use of terminology in this section when I have moved from using equity to equivalence. In the analysis of curriculum development in Sweden by Wildt-Persson and Rosengren (2001) the use of three terms central to the concept of “fair chances

in education”; equity, equality and equivalence, is acknowledged. Equivalence is however argued to be the one encompassing best the “Swedish principle of fair education”.

The shift in significance which the concept has undergone appears to Englund (2004) to be an aspect within not only the social power play in which it is part of, but also at the same time a clear expression for the “reality constituting” power of language. Englund goes further with an analysis of curriculum development, with an historical perspective, where the concept of equivalence is problematised and regarded as a concept which “has long been essentially contested”.

How can the concept’s introduction, which has come to substitute the concepts of equity and equality, and subsequent salient position in education policy and school debates be explained? What are the consequences of the different usages of the concept in relation to the role of schools when creating possibilities and opportunities for the community and the individual? (Englund 2004, 126.)

In the analysis derived from these questions it is argued that the concept has functioned “performatively”, and, in conjunction with other developments, has contributed to constituting a changed “school reality”. The future role for the concept is then seen in terms of a “communicative problematic” where it will be recontextualised in new situations (Englund, 2004, 126).

A shared notion that is possible to identify in the different studies approaching equity, or any of its related concepts, from the perspective of curriculum theory, is an acknowledgement that concepts are historically constructed and change with time, depending on the “time context” (Ahonen 2004). The analysis of the role of specific actors is also a common feature in this approach. Englund (2004) gives specific attention to the evolution of political values, particularly in reference to the Swedish social democracy, and the impact that this has had in the discourses of equivalence or “fair education”. Similarly Ahonen (2004) makes connections with the evolution of the Finnish political landscape. This is clearly presented in the analysis of the changes

in the meaning of ‘educational equality’ from the conformity of the nation-making period to the equal opportunity of the egalitarian 1960s and further to a competitive equal opportunity of the very late 1900s in Finland.

Though I am here trying to define features likely to make a distinction between specific approaches and focus of attention in the studies of equity in education, this does not necessarily confine them to particular methodological positions such as e.g. discourse or text analysis. The use of other research methods in combination with discourse analysis in studies of the relation between “policies as a text and policies as a practice” has done well in supporting the contributions based ‘purely’ on discourse analysis (see, e.g. Francia 1999, 2004). This combination has been relevant for analysis of problems as the following:

While we cannot blame the educational policy for the economic, ethnic and social inequalities of the Swedish society in general, it is important to analyse the manner in which this policy increases or reduces the negative effects of ethnic, economic and social segregation. (Francia 2004, 171.)

The initial conceptual stand point of the analysis has, in this case, been an assumption of equality of results that includes equity in the educational process but at the same time aims for the achievement of minimum differences between individuals and groups concerning the volume and type of educational knowledge. In this context different methodological ‘tools’ are indeed needed. Francia (2004) argues that the failure of the equality policy in Sweden of the 1960s, 1970s and 1980s can be explained not only in terms of the existing individual differences but also in terms of the expectations for the results of certain groups of students (e.g. immigrants and pupils from socially disadvantaged areas). According to Francia, while the education reform of the 1990s modified the qualification system, the negative effects of the low expectations have not disappeared when judged by the exam results of certain groups of students. Exploring this intricate

problematic demands using a methodology beyond discourse or text analysis.

I do also include in this approach the research work that goes beyond curriculum theory focusing on the analysis of the historical development of social and educational ideas and their impact on equity (e.g. Ertul 2004). The interest here has been, to analyse “social climas” transferred into “legal measures”, whether curriculum related or not, aiming at making school a more democratic and equal place. Studies of this kind do well in analysing the different dimensions of the gap between intentions in the ‘legal bodies’ and the situations at the level of practices.

Among the main contributions of the research on equity in education with a focus on curriculum development is the elucidation of the different constituent factors that are involved in the discourse on equity in specific contexts. This makes it possible to understand the arguments behind specific practices. Analysis such as the “performative displacement” of the concept presented by Englund (2004) does well in that endeavour. It is worth concluding here that as seen above there is in this approach a “clear” methodological construct for the enquiry, i.e., discourse analysis, text analysis and in some cases multi-methodological based research.

Equity approached from the perspective of indicators

The arguments for the need to approach equity focusing on indicators starts from the rationale that inequalities in schools are dependent on, (a) inequalities of society in general and (b) inequalities of the educational system. It is argued that citizens can hold the state accountable for these two types of inequalities (Meuret 2001). Failure to perceive inequalities as something unjust could have far reaching consequences for social relationships. Questions of equity in the “delivery of education” then become increasingly political in essence. Equity is from this perspective a concern for three kinds of actors: politicians, scholars and citizens.

This argues for the existence of a system of indicators with two tracks: one to make the education system accountable to citizens to help them to form opinions, as well as to help officials diagnose problems and define their actions [– –]; the other to inform officials about citizens' opinions about what is acceptable and unacceptable – in other words, about citizens' criteria of justice and the judgment they hold about the equity of the system. (Meuret 2001, 136.)

According to Demeuse (2004, 49) these arguments seems to be behind the relatively long history of indicators measuring inequalities in international publications dealing with education, particularly in the OECD *Education at a Glance*, and in *Key data on education in Europe*, the regular publication of the European Commission. Various reports produced as a result of international evaluations of students' achievement also contain indicators on inequalities. Other international surveys (*European Households Panel*, *European Value Survey*, *Luxembourg Income Study*, etc.) and national surveys in different contexts also embrace the rational used by Meuret (2001).

There is at the same time an acknowledgment of the different objections that this approach could raise.

One can conceive of four conceptual objections to the focus on a system of indicators: That there are divergent opinions on the nature of the inequalities that make an educational system unfair; that the educational inequalities are unavoidable and immutable, that they are too diverse to permit measurement of them all; and that the search for equality is detrimental to other more important objectives. (Meuret 2001, 137.)

In a thorough examination of these objections to the analysis of equity based on indicators, Meuret (2001) outlines a number of principles designed to give possibilities for indicators to have a successful impact on analysis of equity in educational systems. This analysis largely draws on data from a pluridisciplinary two years research project in which six teams of researchers from Universities

of Liège and Louvain-la-Neuve (Belgium), Burgundy (France), Rome (Italy), Cardiff (Wales) and Madrid (Spain) were involved. The study used different sources (mainly international surveys), and included a survey about the feelings of 14-year old pupils' on justice in five European regions (French Community of Belgium, Paris, Cardiff, Rome and Madrid) (Demeuse 2004; Hutmacher, Cochrane & Bottani 2001).

The theoretical framework for outlining indicators expected to assess the equity of educational system is based on four main aspects: context, process, internal result and external results (Meuret 2001, 147). Context is assumed to have two dimensions from where indicators can derive: (a) the social and cultural context and (b) the political context. Processes and their impact on equity have as well two aspects: quantity and quality of the education received. Internal results are to be assessed considering three main aspects: academic achievement, personal and social development and school careers. Finally, external results are considered to account via indicators of social mobility, the individual and collective consequences of educational inequalities. Meuret argues, however, that this outline does not propose an account of all existing indicators, but rather illustrates a framework; according to the principles of justice guiding the reader the relation that a given indicator has with equity may vary considerably. These aspects are, in addition, to be considered in relation to observed differences or relative positions, i.e. (a) inequalities between individuals, (b) inequalities between groups and (c) individual below the threshold "which fairness indicates that nobody should be situated" (Demeuse 2004, 49–50).

The studies of equity focused on indicators follows, with some exceptions, the methodological patterns of the positivist tradition in educational research (see, e.g. contributions in Hutmacher, Cochrane & Bottani 2001). This applies also to studies that though to some extent differ from the conceptual frames analysed above also has in focus the analysis of the specific dimensions of social justice in education.

One of such studies is the cross-country comparison to examine the effect of socio-economic status (SES) on academic achievement at different level of school in different age groups and over time made by Yang Hansen (2004). Applying achievement and social background indicators from different sources, having Sweden as starting point, the study carried out with the help of two-level structural equation modelling technique, showed that SES should be taken as a multi-dimensional and multi-level concept. Typically, an economic capital dimension and a cultural capital dimension are identified at individual level; at school level a general capital factor is identified. Yang Hansen found out that these multivariate properties of SES at each educational level related differently to the academic achievement. In most of the countries, it was found that at individual levels the cultural capital factor has strong impact on students' academic achievement, while the economic capital factor has not. At school level, however, the SES effect varied greatly across countries. These results are used to conclude that in a highly stratified society a selective educational system with decentralized school funding makes the educational inequality and achievement gap greater.

In addition to the shared methodological ground that studies on equity with focuses on indicators show, there seems to be also a common specific concern about the relationship between research outcomes and policy makers in different levels. In other words, how specific research finding are 'read' and taken into consideration by policy makers. Presenting 'solid' and accountable findings, is expected to contrast with what Demeuse (2004) consider 'pious wishes' about equity.

A comprehensive research platform for studies of equity in education – desired and possible?

The different studies that are used here to present the existence in 'our research milieu' of three main approaches or focus of attention in the inquiry on equity, have in common a noticeable concern

with social justice in its different dimensions. The interest in a distribution of education where “public good” and “private good” (Englund 1993) could find a sort of ‘harmonious balance’ seems to underpin the different intentions of the enquiries. In understanding these different approaches or focus of attention it may also do well to consider their relationship to different levels of social justice as concisely presented by Schmidt (2001). Assuming that social justice in education, hence equity, is connected to so called “different levels of societal aggregation”, i.e. macro, meso and micro levels (Schmidt 2001, 14338) it is then possible to understand both the substance and the complementing value of the different approaches or focus of attention that has been so far analysed.

In order to ‘place’ the different approaches to equity discussed here into the major frame of a concern for social justice it might be valuable to first look at the content and tensions of the levels. The macro level of social justice is assumed by Schmidt (2001) to have several layers in which the highest is that of the “constitutional order of society”, which defines forms of government, ground rules and the integration of its mayor institutions into a large scheme. The next lower layer is assumed to be “that of concrete politics” where different social groups compete for influences in the designation of particular policies in all aspects of social life. Schmidt adds a third final layer considered to be the “policies itself”; among them educational policies. In line with other studies (cf. Miller 1999) Schmidt (2001, 14338) argues that:

The initial design of such policies can have far-reaching implications for future policies because once a particular policy structure or pattern is established in a given field, it tends to shape the public expectations towards it [– –] limiting the options available to future policy makers.

The focus on equity from the perspective of curriculum development, as in the analysis made by Englund (2004) and Francia (2004), does well in providing an insight into the implications for equity of the different tensions and relationship between the

constitutional order of society, concrete politics and the policies itself.

For our specific area of concern schools can be considered what Schmidt (2001) calls the “meso level”, consisting of organizations, intermediate institutions, according to specific “societal sectors or societal subsystems”. This level, school as an organization, is one of the two most relevant settings allowing defining whether specific educational policies can be labelled as equitable or not. Indeed the degree of autonomy of school as organization is subject to the influence of the macro level of decisions; the contrasting pictures on equity which can be found in schools across regions or countries is very much conditioned by the particularities of this relationship. There is finally a level in the society’s structure characterized by the interaction between the individuals, defined as the micro-level for social justice (Schmidt 2001). This is the second and possibly most relevant element in the definition of what is equitable or not in education; the classroom, together with families is for many the place offering the widest scope for individual choice and enacting social justice (Okin 1989; Freire 1972; Schmidt 2001). This which is in principle a ‘theoretical scope’ is largely constrained by the significant impact of the macro level and the cultural and social perception of appropriated choices (Okin 1989; Schmidt 2001). Back to the analysis of the different approaches or focus of attention in equity studies, it is at these two levels where it is possible to find the biggest ground for the contributions that has been made and the ongoing inquiry concerning both indicators of equality and equity practices.

At this stage it is worth remarking that the parallel that has been drawn here between different levels of social justice and the different approaches or focus of attention in the studies of equity by no means excludes an ‘upright’ analysis. From this perspective, i.e. issues of equity practices in a classroom could well be analysed in relation to the constitutional order of society, concrete policies in a particular historical period, and the role of the organization itself in supporting or not these practices. This intention is already identifiable in studies like the one by Gewirtz (cf. 2002).

The central question which is posed in this article, i.e. *what are we investigating and discussing?*, turns then into a methodological one rather than been a question of absolutely contrasting theoretical positions. Still the methodological dilemma associated with the differences in approaches and focus of attention is big enough to make easier any cross national research and academic discussion on equity. Obviously, the research and discussion are very much facilitated when it is done within the frames of any of the mentioned approaches.

Our insistence in the possibilities of cross national and cross cultural research is largely based on the contribution that this type of research could make for the studies of equity.

Cross-national comparative research can help to establish or sharpen the understanding of the country's uniqueness [– , and] can help to discover where and why social occurrences in one country differ from those in another, and how the context, historical background, social conditions and culture shape the manifestations of a specific phenomenon, thereby enlarging insight and knowledge through enlightenment and revealing alternative options. (Pepin 2004, 223.)

This might be better achieved by taking particular notice when comparing national educational systems that:

[W]e need to consider the extent and ways in which different histories, social and cultural configurations and different sets of constraints mean that different equity dimensions are relatively fore-grounded – or alternatively neglected – within different national contexts. We also need to consider how these different histories, configurations and constraints contribute to contrasting patterns of success. (Gewirtz 2004a, 38.)

The methodological challenges will nonetheless be significant, considering in particular that “it is not enough to seek equivalence in comparative research design, perhaps not even entirely possible to do so, if one explores intricate and salient concepts such as equity”

(Pepin 2004, 233). I would like here, however, to emphasize that even though complex, this dilemma is not unsolvable.

Concluding remarks

Three approaches or focus of attention in studies of equity were discussed:

- The focus on practices and context of enactment
- Curriculum theory
- Indicators

They have been associated with three ‘contrasting’ methodological positions:

- Ethnographic studies
- Discourse analysis and text analysis
- Quantitative analysis

The differences in the approaches make the identification of likeness even more complex; the common concern on equity in education may be the starting point in search for their comprehensive articulation and mutual support. From a different perspective the diversity of approaches could be seen as a positive contribution to the concern for equity in education.

I would like, however, to conclude by suggesting the possibility of an analysis of equity in education where, in a dialectic fashion, understood in this context as an awareness of and identification of interdependences and tensions of the elements involved, the contributions that emerge from the three approaches analysed could coexist. This means, a focus on equity where the impact of elements of the ‘macro’ and ‘meso’ level of social justice will be thoroughly examined (cf. curriculum theory approach), in relation to specific forms of practices in education, equitable or not, (cf.

focus on practices). At the same time identifying specific ‘units’ of analysis making research outcomes ‘accountable’ and understandable to different kinds of actors in society (cf. focus on indicators). Obviously in order to assume such a challenge we will need a multi-methodological position where ethnography, discourse analysis, and quantitative analysis could coexist in common research design. Would this be feasible?; though extremely complex I would like to suggest that it is!

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TOWARDS A MORE EGALITARIAN SCHOOL: A CONTEXTUALISED ANALYSIS OF CHANGE

ABSTRACT

School education in French-speaking Belgium has made widespread use of grade retention in managing pupils in difficulties. Since 1995, a number of political initiatives have aimed to reduce grade retention in primary schools, forbidding the repetition of a year within cycles of study and promoting changes in pedagogical practices. The main goal of this reform is to fight the social selection observed with grade retention and to increase equality of opportunity and equality of results at school-leaving. An analysis of primary-level teachers' perceptions and practices highlights how much this reform conflicts with teachers' spontaneous conceptions of equality. In this way, different meanings of equality are presented and discussed in this article. Competition between schools in a quasi-market environment also appears as an obstacle to the egalitarian project.

Introduction

A recent reform of primary schooling in the French Community of Belgium (FCB, the political authority for schools in French-speaking Belgium), is presented and discussed in terms of equity transformation. Rather than one specific reform, we analyse here a raft of policies adopted between 1995 and 1997, which have modified the educational structure within primary schools with the aim of promoting more equality between pupils. Adopting the term used in the most specific decree about this reform, I will refer to this ensemble of policies as “School for Success”.

To assist an understanding of this policy, I have first to make two observations about the characteristics of the school system in FCB. The first one is about its decentralized and fragmented nature; the second is about persistent inequalities between pupils.

The Belgian school system was built from the start around the core principle of “freedom of instruction” asserted from the creation of the Belgian State in 1830. By this principle, a twofold freedom was granted: on the one hand, the opportunity was left to the religious congregations (and more generally to any form of private association or public organization) to offer educational services while enjoying great freedom of instruction. On the other hand, the choice of the school was left to the families, according to their philosophical and religious convictions. In this context, the role of the State in the education system was relatively slight. Throughout the history of the school system, and still today, various “organizing authorities” or “school boards” can offer schooling while enjoying a high level of autonomy: freedom in defining the school curriculum, in recruiting teachers and students, in pupil assessment and in the financial management of the school.

Freedom of instruction is thus a key characteristic of the school system in FCB. However, several authors defended the idea that freedom of choice, instituted at the beginning to organize a transaction between Catholic and lay pressure groups, tended to change its meaning, in particular under the influence of the accentuated

secularisation of the country. It is becoming more and more a “commercial” freedom, making it possible for parents to choose the school according to criteria referring firstly to the “quality of teaching” and personal opportunities (Dupriez & Maroy 2003). One could thus show that the Belgian school system approached a quasi-market, like those developed in England or New Zealand; however, it cannot be said that this was the result of a voluntarist and conscious policy. If the effects of the quasi-market, in Belgium as in these other countries, tended to accentuate the school and social segregation between schools (Vandenberghe 1999; Gewirtz, Ball & Bowe 1995), in Belgium free choice was never defended by the governments as a key vector of an improvement of the quality of the schools. One can even say that the quasi-market was especially denounced for its negative effects.

In parallel, since the beginning of the 1990s, various intellectuals have highlighted the poor results of the FCB school system in international surveys. This resulted in criticism, denouncing the inefficiency of the system, in particular in fighting against academic failure and grade repetition (Crahay 1996). This debate was closely connected to a strike by teachers, who were faced with drastic reductions in employment (in the period 1992–1996). Confronted with the teachers’ demands for “refinancing”, certain experts denounced the “low effectiveness and the weak efficiency” of the system, and the misuse of financial resources in a context where public expenditure on education was higher than the European average. More recent data, elaborated on the basis of secondary analysis of the data from PISA 2000 (Dupriez & Vandenberghe 2004) show that in FCB, inequalities of results among pupils (among other indicators, the standard deviation in the distribution of scores) are the highest in Europe, and that there is a significant inequality of opportunity: here more than elsewhere, a pupil’s score can be predicted on the basis of the socio-cultural characteristics of his or her family.

In this context, from 1995 onwards, a significant reform of primary schooling is carried out, which, through a modification of the curriculum structure and a restriction of schools’ autonomy, aimed to increase equality of results and equality of opportunity. After

specifying briefly the theoretical referents on which our analysis is built, we analyse in this article the trajectory of this policy. We will pay particular attention to the context of policy text production and to the context of practices and practitioners, where the meaning of the policy is decoded and adjusted by the teachers with reference to their own representations and local context.

Analytical Framework

Educational reform is seen here as an educational policy. It is an initiative by political authorities aiming to regulate the actions and interactions of actors upon whom it has some control. In this way, educational policy bears representations encoded in complex ways (via struggles and compromises) and also decoded in complex ways (via actors' interpretations in relation to their histories, resources and context) (Ball 1994). The meaning of the policy itself changes depending on the context of the interpretation. In this study, I will distinguish two basic contexts: the *context of policy text production* and the *context of practices and practitioners*.

Policy text production refers to the environment of the stakeholders. It is the macro-level where policy has to be understood in a structural context as a response to political, economic and cultural issues. And the policy is the result of compromises which are significant in reference to this macro-level context and history. But policy as *textual intervention into practice* does not determine action. In fact the policy, like a page which action comes to write upon, constitutes both a constraint and a resource for actors (Giddens 1979); and the macro-system itself is at intervals worked on, reactivated, or remodelled by the games of local actors. Policies create circumstances in which the range of options available in deciding what to do are narrowed or changed. But interpretations of the policy and local responses are constructed in context. Consequently, any analysis of educational policy must take into account local enactments of the policy and construct interrelations between context of policy text production

and the contexts of practices and practitioners. Because it is inside the schools and classrooms that school managers and teachers put the bits and pieces together. “Individually and collectively they must make sense of reform, and at organization and classroom level develop interpretations and practices which engage seriously with the changes and their consequences for working relationships and for teaching and learning”. (Ball 1994, 12.) In this way, our work falls within the sociological paradigm of social constructionism, which tries to articulate the ways in which structures and actors’ games are taken into account (Corcuff 1995) for the construction of social action.

In conjunction with this two-level analysis, we will discuss the normative assumptions underlying concepts of justice and equality, trying to show how these concepts differ with the contexts and how characteristics of macro-level context affect the enactment of the policy at school and classroom level.

Context of Policy Text Production

The Belgian education system is thus from the start a relatively decentralized system from the point of view of the school initiative. This fragmentation can be seen in the fact that great disparities exist in several aspects between the schools and between the school boards as regards curricula, modes of evaluation and certification of pupils, and recruitment of the students and teachers. These disparities appear to be associated with pronounced inequalities between schools and between pupils. In this context, the important work of parliament with reference to educational laws and decrees – between 1995 and 1997 – seems to be a response by the authorities to this diagnosis. Taking its inspiration from international experiences and especially from the school structure in Scandinavian countries, the government (advised by educational experts) started promoting a new concept of education. New ways of managing pupils’ heterogeneity and pupils with learning difficulties were especially emphasised.

In this way, an important characteristic of the “School for Success” reform is the definition of numerous rules for all schools, public and Catholic, state-organized and state-subsidized. It is an important step towards a shared base of rules limiting the significant autonomy which school authorities have possessed. For this research, our main interest is about the transformation of the structure of curriculum; but we will mention briefly other parallel changes.

With reference to the structure of the curriculum, in 1995 the political authorities adopted a decree entitled “Decree relating to the promotion of a School for Success in foundational education”. This decree consisted of a short text, not very explicit as to its ultimate ambitions, whose importance was only partially clear at the time of its adoption. However, it proved to be a significant agent for the transformation of the curriculum in foundational education (from 3 to 12 years old) and in particular, in primary education (from 6 to 12). Basically this decree announced that in due course (between 2000 and 2005, depending on the particular level) schools in foundational education had to organize teaching into cycles in order to enable each child “to progress through his or her education in a continuous fashion, at his or her own pace and without repeating a year from his or her entry into kindergarten until the end of the second year of primary school” (Stage One) and from the third year until the sixth year of primary school (Stage Two). It is only at the end of the stages that teachers may, if necessary, decide that a pupil should do a complementary year in his or her current stage.

This decree had major consequences for teachers in French-speaking Belgium, who have made widespread use of the repetition of years in managing pupils in difficulties. Thus, according to the available statistics for the beginning of the 1990s (Crahay 1996), it appears that 29.5% of pupils had repeated at least one year by the end of their primary schooling. Teachers, therefore, would have to adapt themselves to this new measure and put other strategies in place to help pupils in difficulties. Further texts went on to specify the measures opted for. The decree “Missions” in July 1997 explicitly introduced educational orientations inviting all teaching establishments to

develop measures for differentiated teaching, i.e. to vary teaching methods in order to take account of heterogeneity within classes and the diversity of pupils' learning needs. It also called for progress reports in order to provide pupils with feedback, independent of the formal marks which were to be given at the end of each stage. More detailed ministerial circulars then took up this proposal in detail. They were grouped around three key themes: within each educational stage, due value was to be given to the *continuity of the learning process*, over and above the division into class years; measures for *differentiated teaching* were to be put in place in order to adapt to the heterogeneity of the pupils; and finally, the learning process was to be regulated by means of *progress reports*.

In parallel, the decree "Missions" also introduced the reference to a threshold of competences. In this way, the State promulgated standards of competence corresponding to basic instruction (6 to 14). Schools can maintain their own programs but these must fit with the standards, and all the children must attain the common threshold. In the same decree, various articles defined stricter rules governing registration and suspension of students, limiting the autonomy which Catholic schools possessed.

The reorganization of primary education and the initial part of secondary education into multi-year cycles of study, the banning of repetition of a year within the cycles, criticism of streaming, and a common core-curriculum clearly fit with the objective of a more integrated system of education, close to what is offered in the Scandinavian countries. In this sense, "School for Success" can be seen as a major piece in the construction of a more egalitarian school system.

Before specifying the different concepts of equality managed around this policy, it is however important to mention that teachers' unions opposed another interpretation of this policy, specifically concerning the criticism of grade retention. They considered that it was fundamentally a budgetary policy: in a context of budget cuts, school success is cheaper than school failure (with grade retention, the pupils stay in the school system for longer). Furthermore, they

considered that this policy, drawn up by politicians and educational experts, is a path towards standardization of classroom practice attempting to reduce the professional nature of the teacher's work.

In terms of equality, let us begin by recalling that aims of equality occupy a modest place in the history of school education in Belgium (Dupriez & Maroy 2003). The importance historically accorded to freedom of teaching did not favour the development of aims of equality. And such a key text as the School Pact (1958) limited itself to providing for equality of access for pupils by banning all forms of school tuition fees and guaranteeing funding for both public and private education.

There is, then, something specifically new about the political texts from the beginning of the 1990s and in the statement made more or less explicitly in different documents of an ideal of equality of results. It is this ideal of equality that is at the origin of the "Standards of Competence" as a norm imposed on all schools and defining the basic attainments to be achieved by all pupils at each stage of their education. For its part, the 1997 decree "Missions" stressed the objective of equality of opportunity. This stated that all school boards should "ensure that the schools for which they are responsible should take into account their pupils' social and cultural backgrounds, so as to provide each of them with equal opportunity of entering society, culture and the world of work." The declared objective is to neutralize the effects of belonging to one particular social or cultural category as a factor in the prediction of educational attainment and employment.

Looking at the normative assumptions of these conceptions, it is necessary to take into consideration that the main shift with anterior conceptions of equality is the emergence of an *ex post* conception. The school's role is not only to give the *possibility* of getting educational achievements for everyone; it is to make *effective*, at leaving school, equality of opportunity and attainment of basic learning for everyone. I develop below a short analysis of these two concepts of *ex post* equality.

Equality of Opportunity of Results

Equality of opportunity, as expressed through the decree “Missions” is not the traditional Rawlsian (Rawls 1971) and “social-liberal” conception of fair equality of opportunity. It is a more radical statement. It should be borne in mind that for Rawls, “social and economic inequalities are to be arranged so that they are [– –] attached to offices and positions open to all under conditions of fair equality of opportunity”. Hence, at given innate talents or natural endowments, all individuals, from all social groups, should have the same opportunities. And school is one of the main institutions involved in this goal. However, it has to be noted that Rawls is not concerned with actual achievements, but with expected outcomes. As Arnsperger and Van Parijs (2000) put it, “The principle of fair equality of opportunity does not demand that all categories of citizens should be guaranteed the same probability of access to different social positions; it simply asks that people having the same talents should have the same possibility of access to those positions.” (Arnsperger & Van Parijs 2000, 59.) The meaning of equality of opportunity expressed through the policy here analysed is, on the other hand, centred on educational achievement and social perspectives at leaving school. It demands a special investment from schools, teachers and heads to get equality of results among social groups or what we could call *equality of opportunity of results*. Through this work of equalization done by the school, pupils are supposed to have the same opportunities after school.

Equality of Basic Learning

The second conception of equality suggested by this policy is *equality of basic learning*. It refers to the basic attainments to be achieved by all pupils, during the first stages of education (6–14 years). There are two main differences between this conception and equality of opportunity of results. First, it is centred on the first stages of education while equality of opportunity refers to the whole school system and access

to higher education. Secondly, equality of opportunity of results focuses on the differences between social classes, tolerating differences between children within every social group. The objective of basic attainments achieved by all pupils does not tolerate inequalities between pupils, at least with reference to this basic learning.

In this way, equality of basic learning can be interpreted in the light of two contemporary theories of social justice: Walzer's theory and the sufficientist approach.

Let us recall in just a few lines that the outstandingly original factor of Walzer's (1983) work lies in proposing the existence of distinct spheres of justice, each corresponding to specific concepts of a certain type of good (education, work, wealth, etc.) and each incorporating its own criteria with regard to the distribution of goods. In his eyes, a society ruled by a "complex equality" is a society in which no one type of good dominates the others. A favourable position in one sphere cannot therefore bring with it a favourable position in a different sphere; otherwise such a society is called tyrannical.

But what interests us in particular is the way he envisages the question of equality within the educational sphere. His major contribution concerns the first stage of learning, basic education. In a democratic society, the main objective of this stage has to be the education of citizens and the curriculum is defined in function of the needs of the exercise of citizenship. And, just as a democratic society starts off from the principle that all individuals are capable of learning and sharing in political life, a democratic school is based on that same principle. Hence the aim of a teacher of reading is not to provide equal opportunities but to obtain equal results (Walzer 1983).

In a similar way, the sufficientist approach considers that, in an unconditional way, all individuals should be able to benefit from the minimum resources which will enable them to provide for a certain number of basic needs. The originality of this school of thought is double. Firstly, it is characterized by the definition of a threshold. What needs to be equally distributed is not the whole set of resources, but access to a minimum threshold, which, in the educational field, may correspond to the basic learning or threshold of competences. In the

second place, sufficientism is differentiated from several other schools of thought in the measure in which the objective of guaranteeing a minimum threshold to each individual does not take account of their own degree of responsibility for their situation. In other words, whatever the reasons for a person's failure to achieve a minimum threshold, the community should commit itself to guaranteeing that achievement. For example, if someone is in a situation of poverty after having wasted his or her resources, sufficientists consider that the State ought to come to his or her help even though that person is responsible for his or her situation.

Analysis of such a concept of equality can be made from traditional categories in political philosophy: the place for choices and circumstances (Gosseries 2000). Most theories of justice consider that a just society must compensate, as far as possible, for inequalities resulting from circumstances for which people are not responsible. But inequalities resulting from differences in terms of choices and aspirations are usually accepted, except by strict egalitarians who reject all inequality as intrinsically bad. The specificity of Walzer's theory and the sufficientist approach is to wish to fight against all inequalities, resulting from all circumstances (and not only social ones) and from individual choices, at least up to a definite threshold, here called basic learning. This objective must be discussed in the educational context. This will now be done, assuming the following question: Despite differences in choice and circumstances, is it possible to guarantee to all pupils a minimum threshold of learning and competence?

We should distinguish among the circumstances, those linked to an individual's capacities (their talents) and those linked to their socio-cultural background. What about socio-cultural differences? Are school and society capable of enabling all pupils of all origins to acquire this minimum learning? We may begin by recalling that on this criterion the sufficientist approach is less ambitious than the Rawlsian approach, since it is content to formulate this objective in relation to a minimum threshold. Additionally, we can note that on the basis of a measurement of educational attainments, the Scandinavian educational systems have reached the point of almost

completely demolishing the link between socio-cultural origins and educational performance (Egrees 2003; Gorard & Smith 2004). This is empirical evidence.

With reference to pupils' talents and cognitive capacity, the response from educational experts is clear. Through the postulate of universal educability, they consider that every individual is capable of being educated, and, in a stimulating environment, can be let to a relatively high level of education. The work done by Bloom (1976) on the "pedagogy of mastery" is there to witness to this. The only exception, and one whose definition has obvious weaknesses, is that people suffering from a mental and/or cognitive handicap could be considered as distinct, orientated towards specialized education and educated with regard to other objectives.

Finally, can one educate someone against their will and if they refuse to engage in learning process? It is here that the sufficientist approach in the field of education poses, in the clearest way, problems which are not present in other fields. One can waste one's money and still hope to receive more, one can be an inveterate smoker and still demand treatment, but it would be much harder to refuse to learn and still acquire learning. This question is not answered by sufficientist thinkers. We can, on the other hand, observe the development of this concept when becoming an action principle for teachers and head-teachers.

Contexts of Practices and Practitioners

Beyond this analysis of the global environment, the essential part of this research consisted of case studies carried out with the educational teams (or their representatives) in five primary schools. On the basis of data collected between May 2002 and May 2003 this work enabled five monographs to be written on the schools (cf. Dupriez, Cornet, Bodson & De Smet 2003) in which the processes of each school were described and situated within a specific environment. But beyond the specificities of each school a certain number of general tendencies

stand out and are only fully comprehensible if local action is situated within a wider setting. This is what is done below, after a brief description of the methodological orientations of the research.

Methodology

The choice of a qualitative approach needs to be explained on two levels. Firstly, shortly before this research was undertaken, a survey by questionnaire (Crahay & Donnay 2002) was conducted into primary education and revealed resistance to this reform on the part of approximately half the teachers surveyed. Secondly, our objective, complementing this quantitative research, was essentially to understand teachers' perceptions and the basis for this resistance, for which qualitative research seemed to offer richer results. Additionally, the research team wished to undertake this study through a close relationship between researchers and actors, and in particular by associating the teachers with the work of analysing and interpreting the data.

The five schools were selected on the basis of two parameters: the size of the school and the *a priori* mode of implementing the study-cycles (multi-grade classes and single level classes). These schools, additionally, come from public and private sector. In each of the schools we had access to different presentation documents: in particular, the mission statement and the activities report. We conducted three preliminary interviews (with the head-teacher and two other teachers), followed by four sociological intervention sessions (see Dubet 1987). In three of the schools, these group work sessions were conducted with all the teachers and the head together; in the two larger schools (with over 25 teachers), the work was done with the head and a volunteer group of teachers. The aim of the interviews was to acquaint ourselves with the history of the school, actors' representations around the subject of heterogeneity and equality, and the teaching practices put in place in the context of the reform. The structure of the four sociological intervention sessions was conceived on the basis of devices for mental training (Chosson 1991): the first

session aimed to bring into the open people's *representations* around the problem posed (ways of managing heterogeneity and the predicted effects in terms of equality); the second session was dedicated to *problematization*, i.e. bringing existing representations into tension and argument; the third session was dedicated to *analysis* properly so called, flagging up the relation between the phenomena observed and accounting for them through means of models; and the fourth and final session was dedicated to *proposition*: in view of the analysis which had been conducted, what action strategies did the people involved wish to propose? At the close of each session the researchers drew up a detailed report which was submitted to all group members for approval. All these data together made up the body of the research. The diversity of sources and the fact that the work was spread out over the course of a year (spanning two academic years) enabled us to "triangulate" and cross-check the information collected. The interview transcripts and the session reports were subjected to thematic analysis in order to preserve the elements which players themselves thought important while linking them to more general problematic and concepts. From the epistemological standpoint the objective was to propose a plausible or trustworthy interpretation of the facts under study (Lincoln & Guba 1985).

Conceptions of Equality

This work confirmed various kinds of resistance on the part of teachers with regard to the reform, both against applying the pedagogical measures suggested and against subscribing to the concepts of equality promoted. I will stress in detail the teachers' reactions to the goals of the reform in terms of equality, showing at the same time how the concepts of equality fit with representations about pupils and in particular pupils with learning difficulties.

We showed above how the official objectives of schooling in French-speaking Belgium explicitly include the aim of equality of access to a minimum threshold of results (equality of basic learning) and equality of opportunity of results, in the sense of an absence of

a pre-determined pathway through education in function of pupils' socio-cultural characteristics. This double aim is a recent factor in Belgian education and is distinct from the traditional notion of equality of access to schools. In Table 1 we set out again from these conceptions of equality, and, with regard to the research, we specify their degree of legitimacy in the views of the actors, and teachers' (and head-teachers') modes of participation in these conceptions of equality.

TABLE 1. Conceptions of equality, legitimacy and teacher participation

Conceptions	Normative assumption	Legitimacy for teachers	Teacher participation
Equality of basic learning: Equal access to a minimum threshold of results (standards of competence).	Individuals do not have either the same resources (family, etc.) or the same talent. But everyone has to achieve basic learning.	Fair degree of legitimacy for this objective, but it is conceived both as difficult for the weaker pupils and at the same time as a levelling-down.	Possibility of remedial work for the weakest pupils.
Equality of opportunity of results: Equal probability of success according to social category	Pupils from different social groups have unequal resources in relation to school. School must equalize and neutralize the effect of belonging to one particular social group.	Major scepticism. Low degree of legitimacy because of compensatory treatment considered to be unjust in the name of equal concern for each pupil.	Participation in the reproducing of inequalities through misunderstanding the structural and cultural effects of the system.
Common humanity: Equality in dignity or in the right of all to be recognized and accepted, independent of talent and destination.	Pupils from different social groups have unequal resources in relation to school. Everyone must receive equal attention and goodwill, but school cannot compensate.	High degree of legitimacy as a personalizing ideology hiding social inequalities in order to affirm ontological equality.	Equal concern for each pupil; the will to give as much to every pupil and to take each as far as possible.

Equality of basic learning, understood as equality of access to a minimum threshold of results, was in general favourably received by teachers. At all events they felt far more at ease with this type of objective than with that of equality of results in the strict sense. It may however be observed that the strategies aiming to attain equality of basic learning are often rather poor, and in many schools consist merely of remedial measures to enable the weakest pupils to receive additional teaching. A minority of teachers, however, was critical of the notion of equality of basic learning, considering that it was a form of levelling-down of educational aims.

By contrast, the objective of equality of opportunity was received with considerable reserve by the teachers who collaborated in this research. They expressed explicit scepticism towards the aim of no longer making success at school depend on the pupils' social or cultural categories. Additionally, the teachers seemed not to have much awareness of the degree of inequality of opportunity and were astonished when the researchers offered quantitative data on how a school career is pre-determined by social factors. I should also highlight how ill-equipped the teachers were to understand the educational difficulties encountered by pupils from disadvantaged backgrounds, and how much they tended to consider such pupils' difficulties as "acquired deficits" rather than seeing them as "a process still under construction". The researchers asked the teachers and head-teachers about their views of pupils' heterogeneity and possible difficulties which they encounter because of working with (more) heterogeneous classes. The most outstanding factor is the prevalence, in the discourse of many teachers, of a mode of seeing and explaining educational difficulties in terms of psychological and/or logopaedic pathology. Without wishing to deny the relevance of such categories, the frequency with which teachers referred to them in order to account for children's difficulties in school appears to be problematic. Socio-cultural difficulties were also often invoked to explain the learning or behavioural difficulties encountered in certain pupils. In many cases this was done in terms of "lacks" in comparison with the behaviours expected by teachers. The attitude of certain families

was thenceforward labelled as rude, inappropriate, disrespectful, etc. In such cases, as in the previous situation, teachers focused on a lack which characterized such pupils. And that lack was given as the explanation for difficulties in learning. It is easy to see that such perceptions are not really compatible with an aim of equalization of opportunity on leaving school.

At this stage of the analysis, it is important to retain the fact that the teachers were sceptical about this conception of equality. That does not mean that they did not support the postulate that everyone can be educated; it meant that, going on their daily experience, made up of inequalities of learning among children, many teachers construct for themselves a perception that not everyone can be equally educated: everyone is capable, but not all of the same thing nor at the same speed. All children can be educated, but certain children are such late starters that they learn much more slowly, while having much more to learn. Thus the gap is even greater at the point of arrival than it was at the point of departure, despite the teachers' efforts and despite the progress made by the weakest pupils.

In a complementary way, in the five schools with which we worked, it was evident that the egalitarian perspective itself posed a problem to the teachers. When we asked them about their own representations of equality, many of those questioned came up with a different view of it, one which, following Boltanski and Thévenot (1991) we would call *common humanity*. For these authors, this notion invokes a principle of fundamental equality among all human beings, who all belong to humanity under the same title. In a way, this is a rather mundane form of equality: all human beings are as human as one another. Thus many teachers basically adhere *a priori* to a minimalist, ontological definition of equality. All children are equal in dignity and in law. Therefore they should all receive equal attention and equal goodwill. Moreover, such a view of pupils and social diversity is fully compatible with a personalizing ideology which is fully present in all schools: "Each child must be enabled to flourish and to progress to the limit of his or her capacity," was something we were often told. Fine, but that

sort of outlook also risks masking the inequalities children start out with, thus making it difficult to “fight” against these inequalities.

Educational Niches and Quasi-Markets

In general terms, it was apparent from this research, as from previous studies (Dubet 2002), that teachers were relatively insensitive towards schools’ institutional and socio-political dimensions. Their perceptions of their job were related first and foremost to the space of the class, and their teaching relationship with their pupils. These perceptions were expressed in terms of the child’s well-being, development and progress, and the quality of learning, leaving out the more political aspects of their job. Moreover, this concentration on the child went together with a large degree of ignorance about the “factors in the system”. What becomes of the children who leave the school? Where do those who are unable to get into it go? Who are the ones that do not obtain their Certificate of Primary Education, and what becomes of them? Why do many more children from disadvantaged backgrounds fail at school? These are, typically, questions which teachers tended not to ask or work on.

When these questions were posed, on the scale of the educational system as a whole, they and the empirical data which provided the answers were a cause of astonishment to many teachers. Through this research, many discovered the extent of the inequalities in the educational system in French-speaking Belgium, but did not actually see the link between those facts and their own everyday work at their particular school. These questions became, in reality, more painful when the researchers tried to establish such a link and made the teaching staff of a school reflect on their contribution, whether voluntary or involuntary, to the construction of an unequalitarian school system.

The notion of “educational niche” seems to us to be a significant theoretical contribution to account for the process observed here. We originally set off from the hypothesis that it is through unconnected selection strategies, sometimes voluntary and sometimes not, that

each school influences its own pupil composition and so contributes to the construction of a highly segregated educational system. By the end of our research, the phenomenon appeared to be more complex than that and to lie closer to the very heart of the educational system. We would say that the construction of a school's culture and identity is at one and the same time the expression of a dynamic mission within the school, and a way of positioning itself in the market environment. By analogy with the biological and economic notions of niche, we consider that the educational niche is the result, both social (and so bearing on the school's pupil composition) and educational (and so bearing on a specific way of envisaging and tackling the pupils' learning) of a process of reciprocal adaptation between the school and its pupils and pupils' families.

Each school, on drawing up for itself a more or less specific plan, does in a global way what is asked of it. The construction of a school culture and identity are additionally parameters which are widely evoked and evaluated in the literature on effective schools (Teddlie & Reynolds 2000). But, on constructing its specific way of tackling its teaching work, each school makes itself attractive to one category of users and simultaneously deprives itself of or even rejects other categories of users. The times of the "out-of-hours child supervision", the choice of teaching specialities, the implicit reference to a school's level, are clearly some of the elements of this attraction and/or repulsion. The teachers generally have a positive attitude towards this phenomenon and are proud to welcome the pupils to whom their school gives priority. They seem to be far less aware that other pupils are at the same time being excluded. At the inter-school level, this approach has the additional advantage of enabling each school to specialize in catering for a certain group, which reduces the uncertainties linked to a risk of pupils changing schools in large numbers, in the structural context of the educational quasi-market. This approach is also capable of reducing competition to the degree in which each school positions itself in a niche which differs from those of its direct competitors. Moreover, given the high degree of decentralization of the school system and the lack of control over

teaching activity in the classroom, it seems that by reason of its niche each school also adapts to a greater or lesser degree the educational objectives (such as the standards of competence) defined by the political authorities.

Each school, then, has an interest in creating a niche for itself. Of the schools with which we worked, “Living Together” was thus seen as a school with a very community-oriented outlook of openness and participation. And, as the head pointed out, “Those who leave us, leave because they are looking for a different kind of teaching from what there is here.” The “Central School” desired to remain a small, personal, user-friendly school; the “Country School”, still more so, was implanted in rural surroundings, working with very small groups of children and offering a generous welcome to pupils with educational difficulties. The “Dovecote School” was keen to maintain its reputation and level despite the changes in its population.

Hence the educational niche can be seen as a means of accounting simultaneously for what is praised, i.e. schools’ capacity to construct their own identity and mission, and also what is silenced or rejected, i.e. their need to hold their own place in competition with other schools.

Conclusion

This research illustrates to what point importing into a school system a structure or way of functioning which has been tested elsewhere, does not necessarily produce the effects attributed to it in other countries. What is particularly noteworthy here is how difficult it is to implant in schools ways of working and objectives which, in the eyes of the Government, seem to represent the ideal solution to the problems of (in)effectiveness and (in)equality encountered in primary education. This tension between the local significance of a policy and its “central” significance needs to be elucidated by underlining the constraints and risks which are specific to each of those contexts.

With regard to the “centre”, the period 1995–1996 was a difficult one for the government of the FCB. The budgetary situation of the country was critical; many jobs in the teaching sector had been suppressed, causing widespread and long-drawn-out strikes in schools. A clearer understanding emerged of major factors of ineffectiveness and inequalities in the educational system. The Centre-Left government in power at the time saw the importance of restoring to schools a sense of direction and purpose, and the key to this was the quest for greater equality. Offering all pupils equal opportunities of social emancipation was proposed as one of the school’s main objectives. Taking as its inspiration what had been done in countries which had produced the greatest equality in schools (principally Sweden and Finland), the government decided to move gradually towards a more integrated and comprehensive school system. Without concerning itself too much about the implementation of such a policy, the authorities thought they had constructed a new motivating project. Not only was the objective – success for all – a noble one, but additionally, those who planned it thought that they knew the solution: working in cycles and developing differentiated teaching practices in classes. And, as the teachers’ unions underlined, a significant reduction of failures at school should bring about a corresponding reduction in expenditure on education. Pedagogical and economic arguments reinforced one another.

In schools, apart from a minority of teachers who were already working with this aim and who now felt strengthened in their views, the situation was more complex. Local constraints were obviously present. Although the government made equality into a major aim, it did nothing to modify the quasi-market structure which is known to produce segregation and inequalities. Local pressures for each school to maintain its clientele were therefore extremely powerful, and conflicted strongly with the aim of a single education and basic learning for all. Insofar as the government policy relied essentially on educational discourse and prescriptions, two elements were to be observed. In the first place, pressure from the centre was not strong enough to counteract market forces. Most schools remained faithful

to their particular educational niche and maintained the practices of selection and sorting that they had operated prior to the reform. Secondly, the discourse was sufficiently strong to lay the guilt on the teachers, and create a progressive sense of role alienation (Cattonar & Maroy 2000). The distance between their declared role (little certification of evaluation, work in multi-year cycles, joint teaching by groups of teachers, differentiated teaching methods within classes) and their true role was incontestable, and was clearly apparent in three of the schools we worked with.

It is in this context of defensiveness on the part of teachers that the misunderstanding of the meaning of the term “equality” must be understood. It is due in some measure to self-protection: that teachers cannot believe that all children, whatever their background, can succeed in school. It is simpler to believe that pupils arrive at school with gaps too great to be bridged, whether psychological, cognitive or cultural, and that the teacher is not in a position to obtain success for all of them.

It is clear that the implementation of a reform cannot limit itself to modifying the structure of the curriculum. Hence, other conditions need to be put in place (see Walzer 1983) to ensure that the primary school is really a school for success for all pupils. Among the different conditions suggested by Walzer, we have selected three: internal heterogeneity within schools; adapting the means in function of pupils’ needs; and protecting schools from external pressures.

- Walzer considers that a primary school whose prime objective is the education of citizens must ensure that citizens *from different backgrounds* are present in each school. So within every school, within determined geographical zones, there should be the same proportions of children from diverse social backgrounds.
- Additionally, it must be clearly stated that in order for all children to achieve the same results, they cannot all be treated in the same way. Certain children will need to receive a *disproportionate* part of the teacher’s attention if they are to achieve the same results as the others.

- Finally, the aim of a primary school for citizens, aiming at equal results in basic education for all, is only possible if the school is sufficiently autonomous with regard to the wider community. Because, as Walzer says, “the pressure which is exerted to enlarge the natural distinctions already existing among the pupils, to identify the future rulers of the country, comes almost entirely from outside” (Walzer 1983, 288). To have egalitarian effects and to counter the pressure from other spheres, in other words to prevent society from becoming tyrannical, schools must be *protected from external pressures*, and the teachers are the guarantors of this closed space. This third condition is admittedly only to be envisaged with a teaching body which is sure of itself, professionally esteemed, and involved in defining the content of its own role.

The non-respecting of these three conditions in the FCB must be taken into account if the reasons for the difficulty in local implementation of this ambitious policy are to be understood.

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BEHIND THE POSITIVE DISCRIMINATION IN FRENCH COMMUNITY OF BELGIUM: CENTRAL CRITERIA VS. LOCAL ACTIONS

ABSTRACT

Since 1998, the French Community of Belgium has a very systematic way to identify compulsory schools which could receive extra means (positive discrimination) based on a formula related to socio-economic characteristics of each school's population. After a mechanistic identification of schools, the Government could add some schools according other objectives indicators not taken into account in the general formula. Once the schools that may get the means devoted by the law on the positive discrimination are acknowledged, each one presents a report on its own action proposals. The first purpose of the article is to introduce a small scale study on schools which are rejected by the general formula and argue in order to receive extra money regarding objectives characteristics not taken into account by the formula. The case studies involve school visits, face to face interviews with principals, study of the school's neighbourhood and population. The main topic of the paper is to identify the

nature of new objective indicators suggested by the schools and the possibility to add such indicators to the general formula, according to the philosophy of positive discrimination mechanisms. The second purpose of the article is to review and present the types of solutions that are proposed by the school staffs in order to secure for each pupil equal opportunities of social emancipation, according to the law. This step prefigures the implementation of an action evaluation system based on local projects rather than on an approach centrally defined on good practice. The topic is the presentation of a typology of the actions proposed by the education staffs of the schools which receive additional means in order to better understand their sense of “equal chances of social emancipation” (as mentioned in the Law).

Introduction

In 1998, the French Community of Belgium adopted a decree which defined very strictly the procedure through which additional resources are to be allocated to schools. These schools were identified as taking students coming from lower social backgrounds. This procedure has been made more accurate and automated in 2002 (Demeuse 2003).

School identification is grounded on a formula which takes students' socio-economic features into account (Demeuse and Monseur 1999¹). The student population of a school is defined according to the socio-economic features of the areas they live in. These areas consist in rather limited units – of about *five hundred* inhabitants – and are called “statistical areas”. The distribution of these areas has been made by the National Institute for Statistics and there are almost *ten thousand* of them in the French Community of Belgium.

¹ An English version (translation) of the paper is also available on the Web: <<http://www.leeds.ac.uk/educol/documents/00003648.htm>>

The schools that benefit by positive discriminations (“D+ schools”) are those that take a determined proportion of students living in an area presenting some objective features:

- living standards lower than the national average, taking housing, family resources and diplomas into account;
- a higher proportion of unemployed persons in relation to the whole population;
- a higher proportion of families benefiting by some social allocations or support.

The identification of positive discrimination schools is based on an automated procedure: a socio-economic index is calculated for every student, according to his or her living place, and this index is then related to his or her school. The average of all the students’ indices of a given school helps to know the index value of the school. The schools are then classified according to their index value; primary and secondary education schools that take about *twelve percent* of most disadvantaged students are selected to benefit by additional resources, which means that the population of the positive discrimination schools is not allowed to exceed twelve percent of the whole school population.

The law also foresees the possibility to add to the list of the schools recognized as “in positive discrimination” through the automated calculation procedure, a limited number of schools representing about 1% more of the whole school population. These added schools are in difficult situations but, for various reasons, have not been retained by the general formula. This addition of schools must be operated by the general Councils, on the basis of objective social, economic, cultural or educational criteria. The list of these schools is set up every three years.

Our study consists in the analysis of the situation of the schools that are not recognized as schools in positive discrimination, but that consider they ought to benefit by additional resources. It is to result in a proposal of objective indicators aimed at helping the policy makers

to make a selection when they will have to add some schools to the automated-listed positive discrimination schools.

The first step of the study included visiting the schools, interviewing the school principals and/ or other members of the educational teams, observing and analysing the school and student backgrounds. The second step, which is now beginning, will aim at formalizing some possible new indicators in order to help the general Councils to identify the “1% schools” to add to the automated list.

The Method

Preliminary Contacts with the School Principals

The first contacts with the principals took place by phone calls; these first contacts helped to get an idea about their major preoccupations in terms of school difficulties suffered by disadvantaged students. All the principals first mention a high proportion of foreign or of foreign origin students,² of students who are not French-native speakers, of students not or not much supported by their parents. Some parents, indeed, may prove to be not able or not eager, for various reasons, to provide their children with scholar and educational support.

Taking into account those aspects, spontaneously mentioned by the principals, raises some issues including:

- If children of some foreign origins are more subject to school failures, it is not only because of language or cultural reasons, but also often because they are, on average, poorer, coming from families where the parents are less academically qualified or work on tasks less valued than Belgian citizens do; it is at least the case

² The proportion of foreign students or students of foreign origin – here arises the issue of identifying that typical population through the available data – has been retained as an aggravating criterion, despite the negative reactions of the members of parliament of foreign origin. These one claim that this type of approach leads to a risk of stigmatisation, whereas other criteria, partially covered by the foreign origin, such as the socio-economic level or the insufficient knowledge of the teaching language, are the really unfavourable factors (Demeuse 2002).

for the first generation immigrants. Now, these variables – level of incomes, level of studies and occupational status in the households – are already taken into account to build the socio-economic index of the areas. Furthermore, the children who have been living in Belgium for less than one year can benefit by another solution to get a satisfactory skill in the teaching language : the “bridge” classes (*Classes passerelles*), meant for the newcomers.³

- Principals describe the situation of their school in an intuitive and rough way, and illustrate them with lots of anecdotes that, though rather meaningful, seem difficult to objectivise on the basis of available and reliable data. Schools rarely have efficient and sufficient means to collect and supply accurate and objective information.⁴

Interviews

In each of the eight visited schools, half-structured interviews have been hold with the principal and any person the principal wished to invite. In all the schools, the following subjects have been treated:

- evolution of the number of students;
- geographic situation of the implantation;⁵
- geographical origin of the students (local recruitment from the neighbourhood or not);
- perception of the socio-economic features of the students;
- school population of other schools in the neighbourhood;

³ These are specific classrooms dedicated to the students who have been living in Belgium for less than one year and intended to help them to have a good grasp of the French language through accommodated programmes of study.

⁴ The data are generally collected only for administrative reasons (counting the students in order to calculate the grants) and the principals – who are in fact teachers with rather few training on statistical tools, even the elementary ones.

⁵ A school implantation is a part of a school located in a building. A particular school could have more than its central building and then more than one implantation. In spite of the number of implantations a school is defined as an administrative unit with a principal. In our field of interest, implantations could be taken into account to compute the positive discrimination index instead of the whole school when it is requested by the large differences among implantations of a school regarding the socio-economic characteristics of the students of each implantation.

- flows of students from and to the school;
- characteristics of the students that have not been identified when the index of the school was set;
- consequences of the non-recognition of the school in positive discrimination on the day-to-day running and specific school difficulties of the students.

Analysis of the Collected Data during the School Visits

The documents, like students' registers or lists, we selected with a view to make a deeper analysis shared several characteristics:

- They supply information which can be collected on a larger scale (for instance, the students' address or the day of their entry to the school).
- They should enable a more accurate review of some aspects of the issue of the "disadvantaged students", but nevertheless, going beyond the logic of the "positive discrimination" decree (for instance, more accurate localisation of the students of a given school in their origin area).
- Some pieces of information which have been analysed may help to introduce an educational dimension to the index but it supposes to make the link with the socio-economic background of the concerned students (for instance, analysis of absenteeism and dropping out).

Unfortunately, when we began the data analysis, we had to dismiss a lot of documents supplied by the schools for different reasons: they were irrelevant, grounded on unclear information sources, they had obvious quantitative errors, they described useless trivial details in our wider perspective, etc.

Issues at Stake

After the deeper analysis of the data and the interviews, we propose two kinds of issues to cope with:

- The first one, “analysis of the students’ areas of origin”, is definitely embedded into the logic consisting in taking into account the socio-economic index of the origin area of each student of a given school in order to set the average index of the school. However, we will try to go further and to localise more accurately the students inside their area.
- The other issues, “mobility-instability of the students, absenteeism and external delays”, lie within the scope of a logic orientated towards the school. They could form a composite index of simultaneous difficulties if it is possible to define an approach which helps to check whether or not the students’ behaviour, in each of the retained domains, is correlated with some of their individual socio-economic characteristics.

According to the principals we met, it seems obvious that the phenomena of absenteeism and entries to schools at any moment of the school year are overall typical of some disadvantaged categories of the student population. It is also obvious that both phenomena make the school life still more complex, on the organisational as well as on the educational aspects. Nevertheless, there is presently no element that would help to make a true link between those behaviours and the socio-economic background of the students.

The results obtained during the schools’ visits and from the analysis of the collected documents can be described briefly. We will first review the analysis of the spatial data (refinement of the socio-economic information coming from the living place of the students) and the analysis of the data coming from the information collected in the schools.

Analysis of the Students areas of origin

At least two elements justify the deeper analysis of the students' area of origin of the students of a given school:

- Several principals claim the socio-economic background of most students is becoming lower and lower. But, in the meantime, we observe a positive evolution of the average socio-economic index of several statistical areas where the children come from.
- A quick look at the lists of the students' address of some schools (after the streets have been classified by statistical areas) shows that the children are not distributed homogeneously within the areas.

There is thus a strong assumption that schools (particularly primary education schools) apply a differential recruitment within the statistical areas studied, since these are not homogeneous in comparison with the calculated socio-economic index. If this assumption can be verified, that could mean that, for some schools, the statistical area is a too large unit which does not take into account the specific situation of the students. A particular school could thus be disadvantaged because of average area indices more favourable than the students' actual situation or than the actual situation of particular streets where they live.

From the data available in the files of the school year 1998–99, we identified, for each school visited, the areas where a sufficient number of students come from (at least ten in our case).

The limits of each of these areas and the streets which compose them have been drawn on a detailed map. That first map supplies a picture of the geographic surface area of the recruitment fields of a school.

From the address lists of the students going to the school implantations selected in 2003–04, two kinds of analysis can be applied:

- Finding possible changes in the way of recruitment of the schools (evolution of the number of students coming from each key area,

- evolution of the average index of these areas, appearance of new areas, etc.);
- and, above all,
- Locating precisely each student in his or her own area (in his or her street) and identifying possible sub-areas which would be quite different from the socio-economic point of view.

The situation of an implantation of the school n°2 offers a good example of the lack of school population homogeneity.

FIGURE 1.
Description of the recruitment of a particular school (School n° 2)

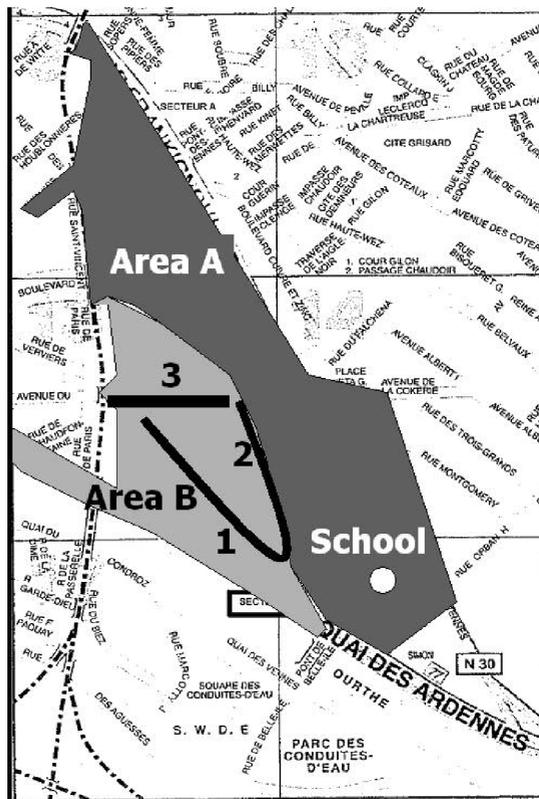


TABLE 1. School population and recruitment in the neighbourhood
(number of students)

	From the individual data 1998–99	In 2003–04 (information supplied by the school)
Population of the implantation	81	71
Students coming from area A, where the implantation is situated (dark area on the map)	26	22
Students coming from area B (soft grey on the map)	32	42

For this implantation of school n°2, two key areas have been identified (on the map, A is in dark and B is in soft grey) which help to localise 71.6% of the 81 students in 1998–99 and 90% of the 71 students in 2003–04.

The average indices of these two areas are much higher than the limit fixed by the government to identify the positive discrimination schools. It is then interesting now to analyse how school recruits a population the principal presents as being very disadvantaged.

First of all, we have to consider the area B, where 57% of the students of the implantation come from (in the school year 2003–04). Those particular students are located in five of the 15 streets of the area, and 65% of them in only *two* streets. When we went on to the field, we could observe that the street number one on the map (with 19 students living there) has almost only social accommodations, which are very old, rundown and not well maintained. In the street number *two* of the same area, where *ten* students live, there are poor houses with restrained dimensions, very often inhabited by several households, as the numbers of bells at the front doors show. The

difference is important when comparing with other streets of the same area, where no student of the implantation comes from. For instance, the street number *three*, which has big *bourgeoises* houses, is mainly inhabited by households where at least one member has a profession (we can see it thanks to the copper plaques and the single bells at the front doors). In this typical case, it's a matter of a non-homogeneous area, with at least two sub-areas, one of them being very favoured and the other one very disadvantaged. The implantation we are considering does only recruit from the disadvantaged part of the area. Nevertheless, the disadvantaged students of the area bring together with them an average area index which is pulled upwards because of the situation of streets such as the street number *three*.

The analysis has been made for *five* of the *six* primary education schools and we could observe that the students of *four* of these schools are not distributed evenly within the areas, but mostly come from one or some particular streets of these areas.

In secondary education schools, recruitment is much more scattered. It's almost impossible to identify some key areas. For example, in 1998–99, the 327 students of the school number *seven* come from 169 different statistical areas. The 801 students of the school number *eight* come from 235 different statistical areas!

The analysis on the primary education does not seem to be applicable to the secondary education schools.

Yet, the principals argue they make their recruitment, within each area, in the most disadvantaged part of the population, the more so as the schools organise technical and vocational study programmes.

The problem our research team is facing now is that there are no public data about lower levels than the area level. To be able to differentiate the indices at a lower level than the area level, we should apply a complex solution, which would need a several-step research work, first evaluating the index value from individual values, which is the case today, then re-calculating the individual values of the students on the basis of the school they go to. This method is presently investigated.

Analysis of mobility and instability of the students

Among the information supplied by the schools themselves, the issue of mobility and instability of the school population has been selected for the following reasons:

- It is spontaneously mentioned by all the principals we met. According to them, mobility and instability are mainly due to disadvantaged students;
- Instability raises problems in the school career of the concerned students as well as in the organisational and educational running of the school;
- At first view, it seems possible to measure instability on the basis of data that are objective and available in the school.

Two complementary approaches have to be followed. The first approach concerns the date of student entry to the school. This piece of information was easily available and accessible in each school. While reviewing these dates, we can see that a significant proportion of students come to the school after the 30th of September.⁶ And we know that moving explain only a very small part of these “late entries” to schools. A selection was made for each school about the entry month of all the students going to school in 2003–04. A mere dynamic two-way table supplies for each class the number of students who arrived on each month of the school year.⁷ For instance, we have the following table for the school number one (tables 2 and 3).

⁶ The school year begins on September 1st.

⁷ We consider here the entry month of a pupil in spite of his year of entry. Then, in table 2, 4 pupils now in 1st year of primary education (P1) join the school in January (it could be during the year 2003–04 or during a previous year, during his pre-primary education).

TABLE 2. Entry month at school n°1 for the three pre-primary and six primary classes (2003–04)

Month	Class									
	<i>M1</i>	<i>M2</i>	<i>M3</i>	<i>P1</i>	<i>P2</i>	<i>P3</i>	<i>P4</i>	<i>P5</i>	<i>P6</i>	To- tal
January	5		4	4	1	2		1	2	19
February	1	1	2		3	2	1			10
March	3		2		2	1	2	1	2	13
April	1	2	2	1			1		1	8
May	4	1	2	1			1	2	1	12
June				1	1					2
July ⁸										0
August ⁸										0
September ⁹	16	8	20	24	20	22	19	18	22	169
October	5	1	1	2		1	3	2		15
November	7	3	1		1		2	2	3	19
December			1	1	1					3

On a total number of 270 (pre-primary and primary schools together), 169 of them go to school in September and 101 of them, or 37.4%, at another moment of the year.

The situation of the pre-primary school being rather specific (a lot of children go to school at the age of two years and a half, whatever the moment of the school year), we will just consider the students enrolled in the school for or after the first year of primary education.

On the total number of 77 students enrolled in the school for or after the first year of primary education, 15 of them, or 19.4%, came at a moment distinct from September, even though enrolment is

⁸ Holiday period: no entrance at school.

⁹ In grey, month of entrance at school: September.

TABLE 3. Entry month at school n°1 for the pupils who join for the first time one of the six primary classes of the school in 2003

Month	Class						Total
	<i>P1</i>	<i>P2</i>	<i>P3</i>	<i>P4</i>	<i>P5</i>	<i>P6</i>	
January		1				1	2
February		1					1
March			1			1	2
April							0
May							0
June							0
July							0
August							0
September	10	9	9	13	11	10	62
October	1			3	1		5
November				2	1		3
December	1	1					2
Total	12	12	10	18	13	12	77

compulsory before the first working day of September (a special dispensation is required after the 30th of September).

It would be convenient, to be able to measure the significance of this factor of instability/mobility, to compare the situation of a higher number of schools in this aspect. It could be then possible to check if there is a link between the average index of the school and the significance of the phenomenon of the student mobility.

The second approach to the phenomenon of the student mobility focuses on assessing the significance of the student flows. All the principals we met mentioned a significant yearly renewal of their

school population. Some of them talk about such renewals as representing a third part of all the students each year.

The data collected in the schools do not help us to make a deeper analysis of the phenomena but we think that, in the medium term, all of them should be able to supply the date of entry, as well as the possible date of leaving for each student and each class.¹⁰ To be appropriate, the analysis should focus on the data available from the second grade in primary education and from the grade eight in secondary education. The distribution according to the level of study will help to distinguish the natural leavings (for instance, end of the sixth year), from the other ones. It could be interesting to observe the recurrence of the phenomena over a period of several years.

Moreover, the results of the student instability analysis could be usefully enriched by more accurate data about the school careers of the students, not only in terms of school changes, but also study programme changes or implantation changes. This type of information will be taken into account in the second phase which is presently ongoing.

Analysis of internal and external delay

The school delay represents in the French Community of Belgium a very significant and worrying issue. Grade retention does not concern evenly all the students, whatever their socio-economic background or, in the secondary education, their study programme. Crahay (1996, 46–47) focused on the stronger and stronger dualisation occurring between the distinct study programmes of the secondary education. In the school year 1992–93, 37% of the students finished the general study

¹⁰ Demeuse and Delvaux (2004) have analysed, in the Belgian French-speaking background, the students' mobility between two school years (total number of the school population, years of reference: 15th of January, 2002 and 15th of January, 2003). This mobility level is higher than 10% in primary education and can reach 30% in the secondary education. The mobility rates we present here above change significantly according to characteristics of the students or of the school where they go to. It is also to be noted that the students going to D+ schools (and with similar characteristics of gender, age, school delay, nationality and study level) present more mobility than students of other schools.

programme with at least a one-year delay. A decrease in the delay rates has been observed for the last decade in that study programme. During the same period, delay rates increased from 75% up to 80% for the students of the vocational grade *twelve*. The available data for the school year 2002–03 confirm these tendencies, since 28% of the students of the general grade twelve have at least a one-year delay, versus 74% of the students of the technical grade *twelve* and 80% of the students of the vocational grade *twelve*.

In the first school which organises technical and vocational secondary education, 28.5% of the students have a delay of at least *three* years! Only 10% of the students are on the right time in their study programme schedule. In the other visited school, thanks to the supplied data, we were able to distinguish the external delay of the students, that is to say the delay that has been built up in one or several other schools before the entry to the considered one, from the internal delay, which is generated in the considered school. On the total amount of 745 students enrolled in this late school, already 237 of them (31.8%) have at least a one-year delay at the very moment they come to this school.

If we can verify that some schools welcome more than others students with school difficulties (generated in previous schools and in this one), then this indicator is worth being kept. A limit should be fixed after a comparison had been made between more schools and after a connection had been made with the average index of the implantation.

For a deeper analysis of the issue, it is important to go back to the individual data aimed at by some clauses of the “monitoring decree” we mentioned above. Nevertheless, this solution has a high risk: if a compensatory advantage was granted to schools which take students with a study delay built up in other previous schools, without penalizing them, we can assume that, within a system where there is already a very strong, while implicit, hierarchy between schools, some very selective schools “get rid of” their lower students through grade retention and an advise of orientation towards a less selective or more open school.

Analysis of absenteeism

At first sight, the analysis of absenteeism seemed interesting. We believed we would be able to make curbs, comparisons between schools. But we had to decrease our expectations, for several reasons:

- The data available in primary education schools are in the attendance registers completed by each teacher in his or her own classroom. There are very accurate guidelines about the way of doing it, but the reality is that there are very distinct modalities between schools, and even between classes. While it is often possible to point out the total amount of absences, it is much more difficult to distinguish the justified absence (covered by a medical certificate or another official document) from the other ones. Moreover, we can observe a variable level of allowance between schools, for instance about the type of justification supplied by the parents.
- In secondary education schools, absenteeism arises differently since all the schools must hold the account of student unjustified absences, mainly because of the clause of the Mission Decree which foresees, from the second degree, the loss of the status of regular student for those who reached a certain number of unjustified half-day absences.

If we consider that the management of these “absenteeism files” and the prevention actions related to school dropping out represent an additional and significant burden for some schools, then it seems relevant to take into account, as far as primary education is concerned, an overall index about absenteeism which could be set up from regular students’ average per month-attendance rates (those data are checked).

For the secondary education school, objective data about unjustified absences could be used to build an index peculiar to the school. This index could be weighted by the number of students who lost their quality of regular student. Nevertheless, the loss of the regular student quality has some consequences on the financing of the

school, which does not lead schools to be particularly strict in that type of registration.

To give an example, let's see the case of the school number eight. Among the *two hundred and four* students of the grades *nine* and *ten* of the vocational study programmes, *fifty-one* of them had more than 19 half days of absence on the 27th of April. *Twenty-eight* of them had more than 29 unjustified half days of absence. Those numbers range from 30 to 186 half days!

In this aspect, previous verifications could be done to establish that, like the principals think, the phenomenon concerns more the disadvantaged students. But the data of each school are not centralized.

Taking this issue into account also arises some questions. In a caricaturing mood, it makes you wonder if it is relevant or not to "reward" the schools where the students are most absent. But this type of indicator can also be considered as very useful to spot the most disadvantaged students, which could help to weight the average index of the school since we could observe that the average index of the origin area does not always reflect accurately the students' socio-economic background.

Provisional conclusion

The data involved in the calculation of the average index of the statistical areas are completely external and independent from the school.

On the other hand, the individual data needed to exploit the proposed suspected issues, such as the student mobility and instability, their external delay and their absenteeism, involve some factors linked to the school or are dependant on a gathering of information made by the school. The case studies showed how much it is difficult for the schools to objectivise the reasons for which they should be added to the list of the positive discriminations beneficiaries. This difficulty is due to the weakness of the data collected on the local level and transmitted to the central level into a system which suffers

by the very large independence of the local actors, together with a tremendous responsibilities scattering and a central administration which is short of workforce and control procedures. At the local level, mainly in the primary education school, the lack of data and of computer and administrative skills to deal with them makes the principals' argumentation rather weak since not much supported. Furthermore, the lack of research about the effective criteria of school success, which can be understood in a system which has, until now, always refused to organise true external evaluations of the students' skills through harmonised procedures, often reduces the possibility for the policy-makers at the central level as well as the actors at the local level to make assumptions.

The review by general Councils of the situation of some schools requires therefore the collection of additional information. These data could be required at first sight for all the schools, through the counting unit, or be the subject of a two-step procedure: first, to make the list of the schools which could be reviewed for which the additional information would be then required. In this case, it is very important to determine a priori a school selection procedure.

In any case, it is urgently required to find procedures of harmonisation of the data collection. We are now facing the following alternative: either the law allows to demand the national register number when the enrolment takes place (but, in that case, what about the students in irregular situation?), or schools must have correct data-entry software, which would integrate also the complete list of streets and codes of the areas of the country.

The ideal situation would be the simultaneous implementation of both solutions, which would help, furthermore, to avoid some anomalies we noted during our research work:

- some (sometimes significant) numbers of students for whom there is no mention of area of origin;
- entry difficulties about some streets and their connection with existing areas by the localities;

- problems due to the quality of the data collection and entry in the schools.

The next step of our study will review the concrete possibility to operationalise the proposed indicators on the level of the school system.

The analysis of the indicators we reconsider only represents one of the five main lines of research such as they were defined in the positive discrimination assessment and global monitoring plan of the educational system, which also foresees:

- A comparative analysis of the school careers of the students enrolled in “D+ schools” and of those going to other schools;
- A study entitled “Positive discriminations: what is there behind the label?”, which aims at reviewing all the projects that have been proposed by the schools that benefit from additional resources, in order to assess their efficiency. More precisely, it’s a matter of analysing the planned actions, their justification and the way they are actually implemented. The main issues in that phase can be summarized like that: “Which are the expected effects and how much are the actors satisfied about the started actions? Are their objectives reached or can the actions still be improved and, if the answer is yes, in which way?”
- An actualisation of the socio-economic indicators related to the statistical areas.
- An evaluation of the effects of the “D+ policies” on the distribution of students between schools and of the potential risk of confirmation or even strengthening of the school segregation. The central question is then: do parents, students and educational teams feel a stigmatisation?

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THE VOCATIONAL 'BACCALAURÉAT' – A SIGN OF DEMOCRATISATION IN HIGH SCHOOL EDUCATION IN FRANCE?

ABSTRACT

Together with the general 'baccalauréat' leading to long higher education and the technical 'baccalauréat' leading to short higher education, the vocational 'baccalauréat' was created in 1987 with a view to democratising and generalizing high school education. The French 'baccalauréat' corresponds to the fourth qualification level (level 6 being the lowest level and level 1 the highest: master degree and above) in the trades nomenclature as acknowledged by the management and the workforce. However, in practice, the newly created vocational 'baccalauréat' is considered as a downgraded and relegation diploma in the guidance and orientation system. Based mainly on interviews of school headmasters this article tries to assess the scope and limits of the attempted equity policies in education. This is done with particular attention to the geographical location of vocational schools which often reflects a spatial segregation mirroring, at the same time, a social and cultural segregation.

Historical Context

In order to put the French vocational *baccalauréat* (i.e. final secondary school examination) into its context, let us evoke the socio-historical conditions of its creation. When mass education first materialized, it meant open access to primary education for all (Guizot Act 1833) until primary education became compulsory and free with the Ferry Acts in 1882. Thus the democratisation of instruction had been subject to discussion for almost a century since the French Revolution. Then a new debate arose between those who advocated a Republican elitist school and those who favoured a democratic school for all. Later, between the World War I and the World War II, and particularly during the Popular Front period, they considered introducing a widespread secondary education but this design was postponed because of the outbreak of the World War II. In 1963, the Langevin-Wallon plan marked the starting point towards a first cycle of secondary education or 'college' for all (Briand and Chapouli 1992), but a decade elapsed before it became effective with the Haby Reform Act in 1975. A last step took place in the late 1980s with the official announcement of a new ambition: up to 80% of an age group to reach *baccalauréat* level. Implementing measures followed in 1989 (Prost 1981).

As far as orientation is concerned, three main periods can be taken into account. During the first period (19th and early 20th centuries), whatever the type of school, schooling was a way of achieving such universal benefits as knowledge, well-being and a way of turning the individual into a citizen, or a *sui generis* being as E. Durkheim once put it. School did not aim at integrating the individual into the economic world thanks to training in a particular trade: the school world and the world of work ignored each other. After the World War II, a second period started when education was devised to meet the needs of the economy: schools started delivering vocational training certificates (CAP), qualifications, vocational diplomas, even if at the same time the idea that general education should be kept separate from the working world still persisted. Finally, technical and

vocational education developed in the 1960s in such a way that the boundary between school orientation and vocational orientation soon became blurred. Education, vocational training and the employment world merged in the eyes of a majority of users. From then on, primary and secondary school pupils were taken to visit firms, started going on work placements, schools organized events during which professionals were invited to present their professions and the world of work. Guidance counsellors started urging pupils to build their projects in terms of trade projects. Schools had in that third period become places where students were supposed to obtain the necessary qualifications before they could enter the job market.

Multiple Logics

To sum up: the French educational system passed from instruction (from reading and writing) to education (general knowledge) and finally to academic and vocational training. Schools have now become essential for individuals to achieve their integration both as citizens and as members of the work force. Nevertheless education in France, although it claims to be democratic, still functions on a Republican pattern in an elitist way insofar as it performs its duty of scouting and selecting 'talents' through highly hierarchized courses.

Although vocational schools still enrol students from underprivileged social backgrounds, the creation of a vocational *baccalauréat* has changed the French secondary education landscape considerably: it now functions in a sort of tubular way¹ through three main courses in which students specialize either in Science (S), in Economics and Social studies (ES) or in Arts and Literature (L) to prepare the corresponding general *baccalauréat*. The second type of *baccalauréat* is the technical one and it offers such specialities as Industrial Sciences and Technologies (STI), Laboratory Sciences

¹ Once a course type has been started it becomes almost impossible to exit before it has been completed: the word tube is a metaphor.

and Techniques (STL), Tertiary Sciences and Technologies (STT) and Social and Medical Sciences (SMS). The last and most recent *baccalauréat* was created in 1987: vocational schools which until then had only delivered basic qualifications such as certificates (CAP) and diplomas (BEP) now make it possible for students to choose among a growing variety of specialities to prepare a vocational *baccalauréat* (about 30 specialities). The present communication will address this category of students.

In theory, within the vocational branch, internal links have been provided between the different levels: for example, a student with learning difficulties may be oriented after *collège* years (1st cycle of secondary school) so as to prepare a vocational certificate (CAP); if he does well, he will go on preparing a diploma (BEP) and perhaps further on, a vocational *baccalauréat* if he is among the best (Circé-Cedefop 1999). Thus, each vocational student hopes *in fine* to qualify for a particular manual trade (as a boilermaker, a metal turner, an office worker, a hairdresser, etc.), knowing that his qualification is acknowledged by the management and the workforce. External links are also possible between courses and they are based on meritocracy: the best students from vocational courses can aspire to technical courses *via* an 'adaptation class' but their number is not statistically very significant.

During their training, all vocational students are supposed to spend a total of 16 weeks on work placements in one or several companies. Besides, their academic curricula do not differ from one school to another – whether public or private, belonging to the Education Department or to the Ministry of Agriculture. As for teachers, they are all recruited and managed by the state. Examinations are also organized nationally under the authority of public administration.

In some cases, vocational training is delivered outside the school system: such training is called apprenticeship. For students it implies spending so many days or weeks alternately in a company and in an accredited training centre where they will be given practical and theoretical training respectively. Whatever the type of training, in the school system (*apprentissage scolaire*), or in the work world

(*apprentissage salarié*), (Moreau 2003) the final examination is the same and it provides a state qualification.

As I have tried to show, the French system of education and vocational training is extremely complex (Derouet 2000), and it is based on a certain number of dualities, for example: public/private; general/vocational; privileged/downgraded; city/country; inner-city/periphery establishments (Peignard, Henriot-Van Zanten 1998; Rochex 1997), along with school training/apprenticeship, Department of Education/other Ministry, not to mention prestigious vs. downgraded courses. Owing to demographic reasons as well as a considerable increase in the number of training offers, education and training have become a vast market with a lot of pressure from those who are well informed: indeed, only the users with capacities, means and spare time can make a choice.

In this competitive context (Ballion & Oeuvarard 1989), let us say that the newly created vocational *baccalauréa* reveals a highly paradoxical situation (Aghulon 1998; Dubet 1998) in the light of *lato sensu* (Ertul 2001, 2003 and 2004) orientation. As a matter of fact, the orientation process does not take the student's professional ambitions into account: each student is asked to elaborate a personal and vocational project but only low-achievers, mostly from underprivileged backgrounds, are oriented towards vocational courses whereas high-achievers are systematically encouraged to remain in general, more prestigious courses as long as possible, whatever their professional aspirations. In other words, the intention of democratizing education (by creating a new type of *baccalauréat*) resulted in maintained selective entry to general education, especially in Science subjects.

In addition to statistical data and informal observations, this contribution will aim at analysing the discourse of secondary school headmasters, in particular vocational school ones, so as to throw light on equity practices in education in France.

Research Field, Sampling and Method Used

The present paper results from a large research into geographical disparities in education and training, financed by the Education Department, the Ministry of Research and the Regional Land Development Agency (DATAR). We chose to carry out this research by focusing our study on one particular area: the Pays de la Loire region, an administrative division, which corresponds exactly to the Académie de Nantes, the local education authority.

Within this area, highly hierarchised training offers raise the question of equity in education. First, there is gender disparity: the overall number of boys is lower than that of girls in the 225 *lycées* of the 5 departments of the region, as boys tend to choose apprenticeship training more often than girls. Secondly, only two thirds of the students go to schools in the public sector, a proportion lower than the national proportion (four-fifths). Besides, as an important part of the population did not use to have easy access to secondary schools, for these were situated in city centres, new schools with technical and vocational courses were built in the periphery of cities in the 1960s and 1970s. Consequently, in spite of recent efforts to create a social diversity mix, inequalities of pupils' enrolment persist, as well as school avoidance strategies (choice of options, dispensations), the last solution being to resort to the private sector, which is not subjected to the recruiting sector principle.

Thanks to Education Department statistical data, we created a sampling of *lycées* in the Pays de la Loire, according to the following criteria: place, training offers, social background, sector (public or private) and date of creation. Then we made extensive interviews with each headmaster of the sample. These interviews, which were held in the headmasters' own offices lasted for at least an hour, following a five-point schedule: historical evolution of the school, sociological and geographical profile of its students, main teaching activities and extra curricular activities, evolution of academic standards and future of those leaving, and finally relations with Education Department and local authorities.

TABLE 1. Distribution of pupils by gender and school sector private or public (2003)

Department	Distribution %				Total (num- bers)
	Boys	girls	Public	Private	
Loire Atlantique	47,94%	52,06%	60,24%	39,76%	47 636
Maine et Loire	48,31%	51,69%	54,80%	45,20%	28 408
Mayenne	46,97%	53,03%	64,01%	35,99%	10 029
Sarthe	49,59%	50,41%	77,69%	22,31%	19 012
Vendée	47,53%	52,47%	48,77%	51,23%	20 342
Region average	48,13%	51,87%	60,01%	39,99%	125 427
National distribution			79 %	21 %	

Source: from statistical Nantes education office

Before giving the results of the headmasters' discourse analyses, let us evoke briefly the context in the *département* that we focused on: the *Sarthe*. One student out of three attends vocational school and 60% of vocational students come from underprivileged backgrounds. There is also a high correlation between socially disadvantaged neighbourhoods and existing vocational and technical schools. Finally, the students' age is highly correlated with the type of school they attend: 27% in vocational courses are older than normal, as they had to repeat at least one year, vs. 4% in general courses. Besides, the correlation between age and social background is important: 48% of underprivileged vocational students are "slow", compared to 38% of vocational students of all backgrounds.

Provisional Results

Each student is oriented according to a rather tedious procedure. Parents, teachers, in particular form tutors- and staff meeting at the end of the year decide on an orientation. If the parents agree with the decision for their child, it is confirmed. If not, the headmaster

takes over and negotiates with the family. At the end of the interview, parents can still appeal to an Appeal Committee (*Commission d'Appel*) in case of persisting disagreement on their child's orientation. But in most cases, only the best-informed parents do so. The other solution is to choose a private school.

The provisional results presented in this paper are based on discourse analyses, statistical data and informal observations. The notion of equity is analysed from various angles: recruiting, communication, publicity, public profile, academic and extra-curricular activities, management policies, different actors' roles, etc.

Recruited or Nominated Students?

The recruiting of students varies from one school to another (Charlot 1994; Charlot & Beillerot 1995). For most school headmasters, recruiting is an inappropriate term as the nomination of students is now computerized. They are not chosen according to a certain number of criteria, but computer-processed. The most sought-after specialities, even among vocational courses, are under heavy pressure rates, demand being much higher than supply. However, the automatic procedure of nomination does not apply to the private sector.

Informative or Promotional Communication?

Although they refuse the notion of recruitment, all headmasters set up diversified communication strategies. Among other actions, they organize meetings with parents of prospective students. Vocational school headmasters in particular do not only inform parents about the various training opportunities they offer, they must also be convincing enough so as to obliterate the poor image of vocational schools among the population. Many headmasters mention the absence of parents from immigrant or modest backgrounds and explain this by such parents' fear of confronting teachers and counsellors on their own grounds.

In recent years, Open Days have become a communication ritual, and indeed every school that we have been to organizes one each year. On such occasion, most schools hand out brochures to visitors. Education and training exhibitions have also become an indispensable publicity means. They take place once a year (at département or region level) and they are very popular among students, parents and education staff. The headmasters that we have interviewed unanimously acknowledge how useful such exhibitions are but at the same time, they condemn a certain *merchandization* of education, some schools being better endowed with communication means than others. They also say that some private schools practise disguised recruiting during such events (Eckert, 1999). To sum up, there seems to be more and more marketing actions which promote the educational product to enlightened consumers (Careil 1998).

Adapting Training Offers to Employment: An Impossible Task?

The question of adapting training offers to the job market was raised a few decades ago. As L. Tanguy (1984 and 2000) put it, employment and training belong to two different systems, each obeying its own logic: economic on the one hand, educational on the other. Traditionally, education in France belongs to the public sphere; therefore vocational training has long been performed by the state. However, over the last few decades, decentralization has given local authorities new prerogatives in terms of training offers. At region level, when a vocational school is created, local economy needs are taken into account (Guilluy 2000; Henriot-Van Zanten, Payet, Roulleau-Berger 1994). Local politicians of the region also put pressure on decision makers. Yet, the creation of new vocational specialities according to the job basin can be risky. An instance of this happened in the *Sarthe* department where a new school had specialized in transport in order to supply a local company with workforce. A few years later, the transport company closed down, so the vocational students could no longer enter the local job market.

Chosen or Imposed Orientation?

A student's *lycée* orientation is highly determined by his/her school results at *collège* level, and therefore staff meetings are crucial for 9th year students (*élèves de 3ème*). High achievers will automatically be sent to general *lycées* whereas low achievers – and students with other types of difficulties whatever their school performances – will be oriented towards vocational *lycées*.

All vocational school headmasters insist on the necessity to devote themselves to integrating newcomers who, for the most part, have lost their self-esteem and need to slowly heal the wound caused by their orientation. It takes time for them to reconstruct themselves, as most of them feel stigmatized (Broccolichi 1995 and 1998) because they come from poor backgrounds and neighbourhoods and are older than the average *lycée* student.

Logic of Competition?

As mentioned in this paper, a climate of strong competition leads schools to resort largely to communication actions (advertising). This is due first of all to demographic decline and secondly to a considerable increase in the number of training offers outside the scope of the Education Department, especially in the Pays de Loire Region.

Apprenticeship is becoming more and more popular (Circé-Cedefop 1999): it represents almost 30% of the number of level V and level IV qualifications (Moreau 2003). Of course, there are a lot of tensions between the two systems of vocational training and many headmasters refer to this dreaded situation of competition.

Competition is omnipresent, even between vocational schools themselves, some specialities being more attractive than others, not to mention the fact that pre-vocational courses (*4e et 3e technologiques*) have been done away with, meaning reduced numbers of vocational students. Added to these difficulties are temporary employment agencies, which attract part of vocational students who drop out of school.

In fact, the ‘collège unique’ or comprehensive school is the sole breeding ground for all types of “lycées” and training associations, public and private alike. No wonder ‘collège’ students are so much in demand.

Violence and Vocational Schools?

The vast majority of vocational schools in our sample appeared very different from the image usually conveyed in the media: very few graffiti, no dilapidated buildings, no major acts of physical abuse. To sort out conflicts, some headmasters summon their disciplinary committee which metes out severe punishments. The way they tackle violence is not significantly different from what they do in general *lycées*. Indeed, the Pays de la Loire region has no big urban centre, with the exception of Nantes.

When asked about violence and avoidance in vocational schools, most principals showed certain impatience: according to them, the public’s reluctance is due to their prejudice against vocational courses in general, not against one particular school.

School Headmasters or Managers?

Traditionally, headmasters have been in charge of the everyday running of schools: schedules, relations with central administration and inspectorate, meetings with parents, contacts with other schools, with the work world, organization of examinations, administrative assessment of staff, etc.

With the 1983 decentralisation laws, headmasters acquired a relative autonomy: while remaining under the authority of the Education Department (at national level), they now depend on local authorities as regards investments and training offers (creations and closures). All the headmasters interviewed said they were satisfied with decentralisation, mentioning in particular the fact that waiting periods have been considerably shortened between the request for an investment and its execution. However, the recent decentralisation

attempts concerning the recruiting and administration of office workers and career advisors do not win unanimous support.

Thus, their job has evolved greatly: headmasters continue to serve their ministry, as they did in the past, by running their schools, but that is not all. Now they have to promote their courses and training offers and to help students integrate into a work environment. They also have to set up adequate training offers financially and materially, in relation with the business world, local politicians, architects, ergonomists, etc.

Headmasters appreciate their new functions in various ways. Some are critical of the changes according to their conception of education. Here is an outline of the criticisms they voiced:

- republican elitists resent the intrusion of new actors into their own 'patch',
- democrats regret the *merchandisation* of schooling,
- secular education advocates condemn the school war,
- autonomists disagree with the interference of the work world in the school world.

Most headmasters however enjoy the changes, in particular the true autonomy of their job.

Academic and Vocation Schooling: Towards a United Front?

In France, as we previously showed, education and training have for ages provided qualifications and diplomas under the control of the state. Yet nowadays, faced with the growing development of training offers outside the school system, the latter is getting organized to offer a variety of trainings with apprenticeship contracts. Of course within every system (public/private, Ministry of education/other ministry), some are in favour of this and others are not. One thing is sure; nobody questions the fact that the school system should keep its prerogatives as regards qualifications.

Conclusion: Vocational Baccalauréat a Stigmatised Orientation?

Whether it is based on an elitist republican pattern or on a democratic one, education is open to all, since school attendance is compulsory until the age of 16. Statistical sources show that the younger generations stay at school even beyond this limit. 100% of an age group has access to 'collège' (first cycle of secondary education), 67% to the final year of 'lycée' (second cycle) and 63% pass a 'baccalauréat'. Republican schooling is based on the principle of equality: all pupils are considered to have equal access to education – even if schools select the best pupils who will later hold the state's destiny in their hands whereas the majority receive the minimum education necessary for them to fit into society. Democratic schooling on the other hand is based on the principle of equity and it is concerned with making up for social injustice. However the former school structures (republican) have never been questioned: each new reform that implemented measures towards more equity was superimposed on the previous structures without replacing them. Such numerous changes only increased the number of education and training offers, like so many consumer goods. Beyond education, vocational training has become the reflection of our consumer society.

The creation of a vocational *baccalauréat* can be considered a strong sign of democratisation as heading towards at more equity at *lycée* level. Indeed, more and more vocational students are now *baccalauréat* holders and they do not find it too difficult to get a job. Besides, they now have access to higher education, mostly to two-year courses in technology (IUT) and two-year higher vocational courses (BTS). Some engineering schools even offer especially adapted preparatory classes for them (on a three-year basis instead of two). Still, the path to success at university level is hazardous. This category's success rate is by far the lowest, and these students pass their two-year higher diploma at an older age than their counterparts (Blöss & Erlich 2000). As for engineering studies, their number is incipient. Finally,

their chances are all the greater at getting a job as their speciality is rare or corresponds to a sector with a shortage of workforce.

While doing this research on vocational *baccalauréat* holders and spatial disparities in education and training, the main problem we were faced with on the field was the stigmatisation of their orientation path, since their "choice" is essentially the result of a lack of academic achievement or an orientation by default. In other words, *collège* pupils with learning difficulties, social problems, failure to adapt to school or pupils with behaviour problems, are directly or indirectly oriented towards vocational schooling.

Positive orientation – resulting from professional ambitions or tastes – is the exception that proves the rule, since a bright student or a good achiever will be discouraged to do a vocational course by his teachers, by his principal and also by his parents if they are well informed "consumers". Likewise, when a *collège* creates an adapted class for pupils with learning difficulties (future vocational students), then well-informed users interpret this as a sign of degradation of the school and they start setting up avoidance strategies. Similarly, the enrolment of a child in the "early-integrating class" of a vocational school is felt by orientation users as a form of exclusion (Rousson 2004; Vayssière 2004), as the pupil in question no longer belongs to general schooling and has to adapt to a different set of values.

Consequently, in the dual context of tubular secondary education, vocational school headmasters have a job communicating and promoting their training offers when addressing *collège* pupils, their inevitable recruitment potential.

This study of equity in education is based on research work, statistical data, informal observations and above all on interviews given by persons in charge of education and training. Of course the point of view of the most directly affected; the students themselves, is missing. As they are often stigmatised because of an orientation they did not actually choose they are seeking for more equity. It would be interesting to complete our work with a field survey of an ethnological type. Most headmasters, who welcomed us very readily, willing to tell us about the reconstructing work they do with the help of their staff

on the field, gave us the possibility of realizing such additional studies, in particular with the newcomers in vocational education.

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FROM ASSESSMENT PRACTICES TO CONCEPTIONS OF EQUITY: FRANCE AND ENGLAND COMPARED

ABSTRACT

This article examines teacher assessment in primary schools in England and France in order to explore the conceptions of equity that underlie practice in both contexts. It uses data from classroom observations, teacher interviews and official documentation. It considers tensions between the levels of government policy and classroom practice, and highlights culturally embedded understandings of equity across two national contexts. Classroom assessment is a space where equity issues are played out in practice, revealing the mediated and contextualised nature of equity practice. Potential tensions arise between competing teacher priorities, and between official policy, teachers' values, and perceived children's needs. At the same time, cross-cultural comparison reveals a broadly coherent understanding of equity within each of the two national contexts. Although French and English teachers expressed similar concerns for equity, the range of practice available in mainstream education was constrained by cultural, political and educational traditions, making actual practice highly context specific.

Introduction

What happens inside a classroom happens inside a society and a culture. The most seemingly insignificant routines and everyday processes reflect explicitly or implicitly held assumptions about learners and learning, as well as views of social justice and values. This article takes teacher assessment as a starting point to explore the conceptions of equity that underlie practice in England and France. It rests on empirical data from observations in primary classrooms, teacher interviews and official documentation, analysed in the light of Gewirtz's contextualised method for understanding equity (2004). This method involves considering the multi-dimensional nature of equity, tensions between different facets of equity, competing norms and constraints that mediate equity practices, and sensitivity to the level-dependency of enactment. In addition, this research comprises a comparative aspect in a cross-national context.

Classroom assessment illustrates the issues raised by Gewirtz, as it involves a contextualised judgement of children's work in a complex situation where different notions of equity are likely to come into play (Pepin 2004). Firstly, in making assessments, teachers are faced with partly contradictory claims, as various aspects of what they consider equitable – or fair – may be in conflict.¹ This is the mediated nature of equity. Secondly, assessment practice is constrained by other concerns, such as teachers' values and conceptions of education, as well as external constraints like pressure from education authorities. Hence observed practices of equity, far from being a direct translation of principles into practice, bear the stamp of compromise and mediations. Thirdly, different actors will view issues from the level at which they operate, so that national policy may well highlight dimensions of equity which are less relevant inside the classroom, and an evaluation that appears fair to the teacher may not seem so to the pupil. This research also explores the dominant conceptions of equity

¹ Here the term 'equity' is used in its broadest sense. It is not distinguished from the concepts of fairness and social justice.

which prevail within the French and English education cultures. Indeed, despite the various tensions that teachers are subject to in their daily practice, their practice and discourse also reflect widely shared, culturally embedded understandings of equity within each of the two national contexts.

The fieldwork was carried out in six French and six English primary classes between 1998 and 2001. The pupils in the sample were aged four to seven years of age, which corresponds to English reception, year 1 and year 2 classes, and to the French *moyenne section* and *grande section* of the *école maternelle* (nursery school) and to the *cours préparatoire*, first year of the elementary school. The schools were chosen in various geographical and local settings (inner city, rural area, town), and most were situated in socially disadvantaged areas where issues of equity are likely to be more keenly felt. Each class was observed for two weeks, using a common observation schedule, completed with detailed field-notes, samples of pupils' work and semi-structured interviews with teachers.

Education in Context(s)

Before looking more closely into the issues of assessment and equity, an understanding of the educational context on either side of the Channel is necessary, as teacher practice is firmly situated within a culture. France and Britain share many characteristics (both are medium-sized democratic industrialised nations of Western Europe). Yet they have developed highly contrasted social, political and educational models. The French education system traditionally epitomises centralisation and strong government control, while England is associated with decentralisation and local autonomy (education was long referred to as 'a national system administered locally'). Reforms since the late 1980s have formally brought the systems closer to one another. All the same, practice at classroom level has evolved at a much slower pace (Broadfoot et al. 2000a; Osborn et al. 2003). National and cultural specificities remain strong enough for Alexander (2000) to conclude

that the English Channel is a greater educational divide than the Atlantic, so that English schools have more in common with North American ones than with those of their French neighbour, and that French education likewise shares more characteristics with Russia and India than with England.

The French education system is highly determined by over a century's adherence to republican ideals, based on the values of the Revolution of 1789 and the rationalist principles of the enlightenment (Schnapper 1991). Elementary education was a central priority for the government under the Third Republic in the late 19th century: it was considered the bedrock of national unity and of a model of citizenship without which the republic could not survive. Schooling is thus the linchpin of a political project committed to a universalist view of citizenship that precludes any public recognition of communities, be they religious, geographic, ethnic or political (van Zanten 1997). Central to this political/educational project is learning: 'liberating knowledge' (*le savoir libérateur*) is seen as the key to freeing individuals from the traditional power structures and hierarchies in which they are trapped. This view of personal development and social integration through knowledge is still repeatedly put forward, as in this recent pamphlet where the ministry of education explains the rationale for its reforms:

Equality first and foremost means ensuring each child, girl or boy, benefits from the same access to knowledge, free from family or social pressure. Freedom rests on enabling each child to conquer independence of judgement and to shape their own beliefs by emancipating them from the pressures that may apply to them outside school. (Xavier Darcos, Education secretary, in Ferry 2003, 139.)

The traditions that shaped the English education system are more diverse, ranging from the reformed aristocratic 'public schools' of the 19th century to the religious 'voluntary' initiatives that preceded state intervention in primary education and, more recently, to the 'child-centred' ideals of the 1960s and 1970s. Despite their great diversity,

these three ideal typical models share a commitment to an educational project that reaches beyond learning. Each claims a broader remit than the simple transmission of knowledge, focussing respectively on the formation of a Christian gentleman; a disciplined, church-going worker; and a blossoming ‘whole child’.

True, these models of education bear limited resemblance to current practice in either country. In addition, reforms since the late 1980s have modified both education systems – beyond recognition some practitioners would say, particularly in England. Yet a comparative perspective highlights strong elements of continuity alongside major shifts. The revised French curriculum repeatedly refers to founding father Jules Ferry, and begins its preamble by raising the issues of “inequalities”, “building children’s minds” and “equal opportunities” (MEN 2002, 7). The ideal of social integration through knowledge remains the foundation of the education system, and is easily identifiable inside the classroom. Similarly, the first aim laid down for the English school curriculum in the 1996 Education Act is to “promote the spiritual, moral, cultural, mental and physical development of pupils at the school and of society” (quoted in DfEE/QCA 1999, 12). This mission statement gives schools responsibility for many more aspects of the child than its French equivalent, an aspect that strikes any French observer in English schools. Policy obviously does not translate directly into practice. All the same, it is worth considering these official mission statements in their own right, as they remind us of the danger of considering ‘education’ or ‘schools’ as comparable entities. Any cross-cultural comparison needs to begin by questioning whether conceptual equivalence exists (Warwick & Osherson 1974), and just as the aims set out for schools either side of the Channel differ, so do notions of social justice (Osborn et al. 2003; Pepin 2004).

Classroom Assessment in England and France

This section presents two case studies of classroom assessment situations in England and France. They form the basis for an analysis of the multi-dimensional, mediated, level- and context-dependent nature of equity practices. The two situations that follow are not statistically representative – no single case study can claim to capture the diversity and complexity of classroom life (for a more comprehensive overview of assessment practices in both countries see Broadfoot et al. 2000b; Planel et al. 2000; Raveaud 2004). However, the situations in these case studies were echoed by many other observations in the same national context and, more importantly perhaps, neither would have been likely to occur on the other side of the Channel. Alexander thus makes the case for qualitative methods' claim to 'cultural generalisability':

For culture is not extraneous to the school, nor is it merely one of a battery of variables available for correlational analysis in process-product research. Culture both drives and is everywhere manifested in what goes on in classrooms, from what you see on the walls to what you cannot see going on inside children's heads. (Alexander 2000, 266.)

The quest for objectivity (France)

In a French school in a working-class area, four-year-old Ouari has just overcome a major difficulty. For the first time, he has succeeded in identifying groups of four objects on his worksheet. The exercise involved circling groups of four on a sheet with thirteen pictograms drawn on it. The task was familiar, but until today he had never come to grips with it. However, he was still unable to complete the exercise, which also required labelling the groups he had circled by writing a number 4 beside each of them. When the teacher comes to his desk to check on his work and to mark it, she immediately congratulates him on his progress. At the same time however, she makes it clear that he

still has not reached the expected standard: *‘Tu as du mal, hein, mais tu as fait des progrès’* [You’re finding it difficult, aren’t you, but you’ve made progress]. She writes down the mark *‘assez bien’* [fair], not ‘very good’ or ‘good’. In fact, in the marking scale used in this class, the only lower mark is the one that indicates failure or an inability to grasp the exercise (“marked” or “to be done again”).

Valuing the child (England)

The English example is taken from a “good work check-up”: a certificate given to a child on the basis of the work done in one of their books. This is part of a strategy to raise standards in an inner city school. Every day, one book from each class is randomly selected and assessed by a committee including several teachers and the head teacher. On the basis of the work in their book, each child is given a certificate with comments. This is meant as an incentive for them, and as a way to inform the family of their progress. Here is the “good work check-up” for Tashana, a year 2 pupil (7 years old) with learning and behavioural difficulties:

I have looked at all your work and I can see that you are much happier at school this term. There are some good finished pieces of work. If you find your work difficult, always still have a go and remember that Miss P. will always help you if you are trying. Next time I see your work I want to see some lovely writing on the pages of your literacy book. You are getting better and better. Good girl.

It is worth pointing out that this text was not written by the child’s class teacher, but by a colleague of hers.

The Multi-Dimensional Nature of Equity

The forms and content of assessment illustrated in the French and English situations help to illustrate the multi-faceted aspect of equity.

To conceptualise these differences, I use the theoretical framework developed by Boltanski and Thévenot (1991).²

Ouari and Tashana's assessments reveal three points of tension between dimensions of equity. These tensions relate to the nature of assessment, its scope and rationale. Firstly, the *nature* of classroom assessment varies widely, ranging from the informal to the formal, from oral to written feedback, encompassing elaborate comments or a single mark. Marks are routinely used in all French classes. In the early years, the most typical scale is a verbal four-point one, from "very good" to "to be done again". From the age of six a numerical scale out of 10 or 20 becomes the norm. Such marks were nowhere to be seen in the English sample, where teachers wrote comments on children's work instead. These comments were extremely varied in length and nature, as the following examples suggest: "Well done!"; "Use of initial letters for unknown words"; "Clear sentence structures. Needs full stops and capital letters. Lovely work"; a pictogram of a smiley face. Tashana's "good work check up" is unusual in terms of its length, but its format and contents are typical. Beyond the form of assessment (a mark or a commentary), what matters is the message it conveys. The French teacher's oral feedback shows her awareness of Ouari's progress, as she congratulates him for overcoming a difficulty. Yet the written mark reflects only the gap between the child's attainment and

² The starting point for this French pair composed of a sociologist and an economist is the problematic coordination between human actors. Initially, in any given situation, there is an uncertainty as to what norms will guide behaviour and its evaluation. There is no taken-for-granted interpretation of the situation, instead the actors will construct a convention which corresponds to one of the six forms of justice and of justification they identify. The authors elaborate six grammars of justification, each corresponding to a different guiding principle: the 'inspired' world of the mystic or artist; the 'domestic' world of family relations; the world of 'fame' based on other people's opinion; the 'civic' world based on the general good as opposed to individual interest, and the 'merchant' and 'industrial' worlds, respectively characterised by the market and by production. Although all their categories are not relevant, what is helpful in their work is the idea that the individuals may apply a different lens to determine what is just in a given situation. Incomprehension or conflict will ensue if actors do not take the same standpoint to evaluate a situation. To illustrate this theory with a very simple example, let us consider various options to share a cake. The civic logic would insist on equal entitlement; the domestic one would require that individual needs be taken into account; the merchant logic would give more to the highest bidder, while the industrial rationale might ask who was likely to use this energy in the most efficient way. Defining equitable practice thus varies according to the order of justification retained.

the targets in the maths syllabus for his year. The mark aims to be an 'objective' measurement of attainment, unrelated to the child who produced it. English classroom assessment (as opposed to national testing) does not take into account peer performance or a preset standard, only children's own progress and efforts. Tashana is thus told to "have a go", to show she is "trying". What is considered to be 'fair' in a French class is an objective mark on an absolute, universal scale. What is 'fair' in an English class is a statement on individual efforts and progress.

Secondly, the form of assessment is closely related to its *scope*. What exactly should be measured? Can or should a piece of work be evaluated as an achievement divorced from all personal characteristics such as social and linguistic background or prior performance? In interviews, several French teachers express their belief in a neutral measurement of attainment for a specific *task*, while their English colleagues relate their judgement to the *child* who produced the work. "Very good means perfection", one French teacher tells her six-year-old pupils. By contrast, a smiley face rewards children who have done their best in English classes, whatever the result. Relating the assessment to the individual child is essential for most English teachers, and Tashana's certificate illustrates the broad range of dimensions potentially covered, ranging from the cognitive to the affective. We read remarks about her output ("some good finished pieces of work"), on progress ("You are getting better and better"), efforts ("have a go") and even her feelings ("I can see that you are much happier at school this term"). The concluding sentence, "Good girl", moves away from the field of work to the whole person. This contrasts with the anonymous system of marking that guides French practice. Although Ouari's teacher shows her awareness of her pupil's efforts and progress in her oral comments, it appears illegitimate for them to feature in the final mark. One French interviewee explained that she could not award a high mark to an average attainer who shone compared to his usual performance, nor could she give a low mark to an excellent pupil who did not work to his normal attainment one day. According to her, doing so would be misleading if not dishonest: "the

average pupil might suddenly think he could stop making an effort, and the good one might start panicking for nothing”.

Thirdly, assessment *rationales* differ. The case studies suggest goals of a different nature: a formative dimension to orientate pupils’ future efforts, and feedback on the stage they have reached. The formative dimension was most present in English classes, with specific instructions such as using capital letters or, in Tashana’s case, turning her attention to her handwriting. This dimension also featured in France, but mainly in oral feedback. What predominated there was the use of marks to place pupils on a predefined map of educational achievement. Marks are the indicator determining whether they have mastered the knowledge and skills set out for their year in government policy. Marks tell each child how they stand, not so much against the performance of their peers but against curriculum targets (most teachers avoided making results public or ranking pupils although the children themselves knew how they fared compared to their peers). The crux of assessment was whether a child would reach the required standard to be allowed to progress to the next class up.³ Children as young as four are still threatened with ‘repeating’ the year by some teachers in France. This approach was absent from English classes although it is worth remembering that observations were carried out in infant classes where pupils were under seven years of age. Even though national testing has now introduced the principle of measuring pupil attainment against external, predefined criteria, such was not the rationale used by the teachers who formed the sample. In some cases the whole school policy for marking insisted that assessment should be relevant to each child, not to preset standards: the aim is “to ensure that the way we mark pupils’ work reflects the stage reached in the development of pupils’ learning”.

Different dimensions of equity come in conflict with one another on several occasions within a single teacher’s practice. Tashana’s “good

³ Officially, in France since 1989, pupils no longer ‘repeat’ the year if they have not reached the requisite standard. Three yearly cycles have been introduced, and in theory pupils can only be held back at the end of a cycle. However, the ministry itself admits that the legislation has never really been enforced (*Le Monde*, 26/8/2004).

work check up” uses the language of objective measurement (“good finished pieces of work”) alongside more subjective criteria (“lovely”) and the idea that results are relative to the pupil (finding work difficult, “trying”). This certificate alternates between Boltanski and Thévenot’s ‘industrial’ field of production (work, writing) and the ‘domestic’ field of emotions (“happier”) and values (“better and better”, “good”); between the output and the whole person (“good girl”). Similarly, when the French teacher gives Ouari a low mark while praising him, she is compromising between the absolute, objective criteria of the ‘industrial’ world on the one hand, and a more ‘domestic’ sensitivity to the child’s efforts and confidence on the other.

The Mediated Nature of Equity Practices

Not only do tensions arise due to the internally conflictual nature of equity, but teachers have many other constraints. In trying to enact equitable assessment practices, teachers balance equity against other values they hold. On top of these internal tensions, external elements such as material and financial constraints or government legislation also come into play.

Assessment brings to the fore ideals of equity, but also other commitments. The case studies above illustrate one value in particular: the promotion, or at least the preservation of pupils’ self-esteem. Compared with their French counterparts, the English infant teachers have retained many child-centred values. One feature of this is their sensitivity to children’s emotions and perceptions of themselves as learners. French observers are consistently surprised by the degree of positive feedback given to English pupils, while English researchers tend to find French assessment particularly harsh (e.g. Sharpe 1992). Concern for pupils’ self-esteem mediates assessment practices in England. It was highly unusual to hear English teachers talking about ‘mistakes’ or saying something was ‘wrong’. In maths for instance, errors were pointed out in a roundabout way: “are you sure about that?”, “oh, that’s nearly right”, “good try, actually it’s less than

that” (see also Gipps 1996; Pryor & Torrance 1996). In interviews, the English teachers concurred in saying that building a child’s confidence and self-esteem was a prerequisite to any learning: “It’s all about self-esteem really. They need to feel confident. I give them time to build up their confidence”. Saying that an answer is “nearly right” reflects a tension between the necessity to point out a mistake and to protect the child’s self-esteem. The first perspective is that of the product, seen from (from) Boltanski and Thévenot’s ‘industrial’ perspective – the teacher knows it does not conform to accepted standards, and would be cheating the child by not telling it. Yet in the ‘domestic’ world, where interpersonal and affective relationships play a major role, the denunciation of an error may be experienced by the child as a humiliating experience. These observations are borne out by others in later stages of the education progress, confirming different perceptions of the learner including or distancing the affective dimension (Osborn et al. 2003).

French teachers did not hesitate to point out mistakes very directly: “that’s wrong”, “there’s a mistake”, “you’ve done something silly”. What is more, because French teaching is very rarely differentiated on the basis of attainment, mistakes feature more prominently in children’s experience of school (Raveaud forthcoming). While English teachers sought to avoid the experience of failure for their pupils, mistakes were an inevitable consequence of giving the same work to all pupils whatever their current attainment and needs. Not that self-esteem was irrelevant to French teachers. Indeed, they devoted considerable time and energy to making mistakes acceptable in pupils’ eyes. They repeatedly explained that making mistakes was inevitable, that it was a healthy part of the learning process. This was one way of protecting self-esteem. But more fundamentally, self-esteem appeared to take on a different meaning from the one it had in the English context. One French teacher made it clear that ‘failure’ did not lie in the inability to achieve an exercise. For her, differentiating work according to her pupils’ achievements would be perceived as an exclusion from the group. To be failing, in her eyes, meant being denied the same expectations as others, and therefore the same opportunities in the

long run. To this end, she accepted that some would struggle more than others to achieve similar results at best.

The main normative commitment that can be read into French assessment practices is related to republican ideals. The abstract notion of the universal citizen (or pupil), who can be free from prejudice only by being considered as an individual independently from the communities they belong to, is echoed in teachers' distancing of personal characteristics. This makes it difficult to take into account pupils' social, ethnic or linguistic background. Is it equitable to penalise a child of North African origin for grammar mistakes if (s)he does not speak French at home? A strict application of republican principles would accept this as a lesser evil in the name of a greater good: that of maintaining equal expectations for all pupils, in order to ensure equal opportunities. From a republican point of view, taking into account elements of pupils' background is conducive to a self-fulfilling prophecy (Jacobson & Rosenthal 1968), turning social disadvantage into educational disadvantage with all the social and financial implications this has for an individual's future. Although the teachers in the French sample did not phrase the dilemma in such ideological or theoretical terms, it was arguably this very tension that led one teacher to hold back a low-achieving minority ethnic child every day during playtime for him to finish his work and keep up with the class. Another admitted that setting identical tasks for all meant the work would be easier for some than for others, but she refused to let some fall behind (or fail to catch up): "So I try and shake them up, I tell them they need to make an effort. I don't give up on them". To her, lowering expectations for the weakest or most disadvantaged would be tantamount to abandoning them. At the age range considered here, teacher practice appeared to be closely inherited from the republican era.⁴ The welfare of the child is thus subordinated to the future

⁴ This becomes much less true as pupils get older and it is less feasible to make the class progress at the same pace. Agnès van Zanten (2001) shows how lower secondary education teachers in the most disadvantaged areas not only renounce equality of treatment in practice, but sometimes also promote alternative principles of justice based on a greater recognition of individual, social and ethnic difference than is the case in the republican model.

needs of the citizen. The 'civic' imperative becomes the overarching framework, mediating teaching practice and subordinating other aspects of equity to it.

A second set of tensions arises out of countervailing requirements imposed on teachers. The pressure to cover the whole syllabus is tremendous in France, and constitutes the pivotal aspect of professionalism for French teachers (Broadfoot et al. 1993). It drives the organisation of the school day, the type and length of teaching children are subject to, as well as the nature of assessment tasks, which are required to measure pupils' mastery of the requisite knowledge and skills. Similarly in England, pressures from the central government have rocketed over the past fifteen years, becoming one of the main grievances of today's teachers (Osborn et al. 2003). Pressures to 'raise standards' filter down through school management right into the classroom. Tashana's "good work check up", for instance, was part of a school initiative to improve the school's results, in direct response to government targets and the powerful effects of 'league tables'. The "good work check up" policy carried various agendas. Several teachers saw it as a new way for the head teacher to monitor, or indeed control, what was going on in the classroom. It was also related to government discourse about accountability and transparency, hence the idea of communicating with the parents. Tashana's certificate becomes a space for a discursive struggle, where a teacher asserts her personal teaching values in the face of these externally-driven pressures. The predominant tone is one of encouragement despite the fact that this pupil is one of the lowest attainers in the class; the scope of the teacher's comments decidedly remains the whole child, without concessions to the governmental rhetoric of 'standards' and 'excellence'. These tensions are even more visible in the British context when it comes to national testing (SATs). Indeed, teacher discontent and resistance has gone so far as to make the government partly back down on national testing at age 7. Not that the government does not seek equity, but its understandings of the aims and means of equitable assessment do not concur with the teachers'.

The Level-Dependency of Equity Practices

According to their location within the education system, actors' views of equity may take a different hue. Relevant aims and means will vary to a certain extent depending on one's level of operation, so that policy makers, school management or teachers may privilege different, if not partly contradictory, conceptions of equity. In terms of assessment, three points of view can be identified to illustrate the issue of level-dependency: that of policy makers, teachers and pupils.

Official documents in England are framed within the language of equality of entitlement, of excellence, and of inclusion. The first aim stated in the "Values, aims and purposes" section of the National Curriculum is: "The school curriculum should provide opportunities for all pupils to learn and to achieve". (DfEE/QCA 1999, 11.) Equity is framed within the language of learning outcomes and attainment: "The focus of this National Curriculum [– – is] to provide [pupils] with a guaranteed, full and rounded entitlement to learning"; "An entitlement to learning must be an entitlement for all pupils" (DfEE/QCA 1999, 3). The rationale for national testing partly rests on the rhetoric of equal entitlement. Teachers for their part are more likely to insist on recognising individual children's needs, rather than pushing for results across the board. In their view, calls for "excellence for all" are often considered unrealistic and potentially detrimental to the most fragile pupils.

Points of view are also likely to vary depending on whether one is assessing or being assessed. Some children clearly indicated a feeling of injustice faced with their teacher's equity practice. Sasha, an articulate English five-year-old, saw a smiley face on the book of a peer who had been copying three-letter-words, and grumbled that she would not get a smiley face for such work. As a high attainer she was expected to write a paragraph independently and had begun using a dictionary, while children at the other end of the scale were still coming to grips with the alphabet. In Sasha's eyes, a double standard was applied to herself and to her peer, both in terms of the type of exercises they were set and of the teacher's expectations. For the teacher, however,

equity implied requiring that each pupil give their best. Where Sasha felt herself the victim of unequal targets, her teacher emphasized equal input and efforts through the equity practice of differentiation. Their aims and criteria for determining equity were incompatible and level-dependent.

French pupils were more likely to endorse their teacher's definition of what was just (Osborn & Planel 1999). Most children had internalised the fact that marks were (or were meant to be) an objective measurement of the intrinsic worth of their work. Ouari thus did not seem surprised or upset by the fact that he was not rewarded with a glowing mark despite having surpassed himself in maths. Like his peers, he appeared to accept that some would struggle to reach a mediocre result while others, with half the effort, gained top marks. All the same, while acknowledging the assessment criteria to which they were subjected, some children tried to subvert the system, or to extract themselves from its austerity. As a participant observer in French classrooms, I was regularly coaxed by some pupils to mark their work and to award them a "very good". My status was somewhat unclear to them as an adult yet not the teacher. This allowed a glimpse of hope that I might not be aware of the usual assessment criteria. However, these children clearly felt that they were committing a transgression and they made quite sure that their hints to me would not reach the teacher's ears. As was the case for teachers, children's conception of equity was mediated by other concerns, and notions of what was fair were offset against pleasure and recognition.

Conclusion: Equity across National and Cultural Contexts

This article has explored some tensions, plural interpretations and mediations that characterise teachers' search for equity practice in their classroom assessment in England and France. Within each setting, teachers are struggling to be equitable while balancing this aim against competing commitments, complying with official

requirements and coming to terms with their own multiple views of equity, not to mention their pupils' feelings of justice.

An added layer of complexity appears when national context is taken into account. Ruth Benedict's theorisation of culture helps to understand how the national setting is articulated to the other dimensions of equity considered so far. Benedict (1934) considers a universal "great arc along which all the possible human behaviours are distributed" and sees each culture as a segment of this arc. Culture thus partly limits the range of behaviour available to an individual (or to an institution) without imposing any one given approach. Teachers and policy makers thus make culturally embedded choices: the element of choice is real, but it is a choice contained within a pool of values, norms and practices. At the classroom level, different dimensions of equity compete to be fore-grounded, and tensions are highly visible (Cribb and Gewirtz 2003). But viewed from a telescope instead of a microscope, the perspective changes, and broad cultural patterns emerge. The cross-cultural long-distance lens gives a degree of coherence to national education systems alongside the multi-faceted aspect of the classroom observation close-up.

Despite their numerous and genuine divergences, English policy makers and practitioners share a set of educational aims that are broader than on the Continent. In particular, schools continue to be given a wide-ranging responsibility over pupils, beyond the strictly cognitive: "The school curriculum should promote pupils' self-esteem and emotional well-being." (DfEE/QCA 1999, 11.) True, many teachers in England perceive the changes since the 1988 Education Reform Act as having impoverished educational aims by re-orientating them towards narrowly defined conceptions of achievement (Pollard et al. 1994; Osborn et al. 2000). Yet seen from a French perspective, the phrasing of the National Curriculum reflects considerable sensitivity to pupils' self-esteem: "[Pupils should be given] opportunities to feel positive about themselves [- -] for example, by having their achievements recognised and by being given positive feedback about themselves." (DfEE/QCA 1999, 138.) Not only should feedback be positive, but it is also teachers' responsibility to provide teaching and

learning situations “giving children the chance to show what they are good at and what they like.” (DfEE/QCA 1999, 13.) Any mention of failure is avoided, the onus being rather on success and self-esteem: “The school curriculum [– –] should build on pupils’ strengths, interests and experiences and develop their confidence in their capacity to learn and work independently and collaboratively.” (DfEE/QCA 1999, 11.) It is of course possible to claim that this is but empty rhetoric, and that testing and league tables point to the government’s real agenda. But a comparison with French policy documents also establishes a degree of consensus – at least in discourse – as to what constitutes acceptable educational practices. This consensus rests on a holistic approach of the child, and a broad educational mission beyond the strictly cognitive which “involves pupils acquiring an understanding of the responsibilities and rights of being members of families and communities (local, national and global).” (DfEE/QCA 1999, 20.)

The French *Programmes* also emphasise pupils’ success: “It is the teacher’s responsibility to create the conditions for pupils’ success. Successful learning owes much to the climate of trust created by the adult and to the encouragements (s)he provides”. (MEN 1995, 40.) Yet this passage is immediately followed by an indirect allusion to failure: “Any unnecessary rushing, any overdramatisation should be avoided, and success should constantly be valued” (MEN 1995, 40). Unlike the English guidelines, the French ones do not reject failure *per se*, only an excessive emphasis on it. Mistakes should not be overdramatised but defused: “A defused error leads the pupil to a constructive analysis of his/her work and to a will to make progress”. (MEN 1995, 40.) Unlike the English focus on preparing pupils for their future family and community life, the French focus is first and foremost on success (or at least survival) in the school system. The republican model of social justice requires that all children play on a level field, not that artificially low criteria are applied to some, thus denying them opportunities to excel and to compete with their peers on an equal footing in their progress through a competitive education system. The observations suggest that French teachers’ concern for

their pupils' short term comfort and self-esteem is overridden by the ideal of ensuring that all children, whatever their background, are given a chance in the education system. Equal opportunities in the long run are set off against the happiness of the child. Political ideals and a concern for the future citizen's economic and social integration counterbalance the well-being of the young child. The 'civic' view of equity filters down from historical ideals that were relayed by political initiatives into the educational sphere, and remains recognisable in various aspects of classroom practice today.

A cross-cultural approach brings to the fore other dimensions of educational practice than those that stand out when analysing a single context. Indeed, it is striking to observe the extent to which national traditions, despite having undergone major redefinitions or shakedowns, still extend their influence into the most minute aspects of school life. Such is the case of holism in the English context, of republican ideals in the French case. The comparative method is a useful complement to national studies in order to access elements of continuity and coherence that tend to be minimised in contexts of change. A second benefit of cross-cultural comparisons is to help situate analyses against the backdrop of traditions and values that feed into debates such as the equity issue. This is not to advocate relativism or to say that genuine comparisons are impossible because of the specificity of each culture. Rather, comparing cultures can help to understand how practices which at first seem highly culture-specific may actually stem from a common commitment to a given value, such as equity. The idiosyncrasies of its translation into practice should not mask the shared ideal, nor allow any one culture to claim exclusivity to it.

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WHO IS RUNNING SCHOOL POLITICS? THE AGENTS OF THE TRANSFORMATION OF THE COMMON SCHOOL IN FINLAND

ABSTRACT

The article studies the historical agency in the recent developments of schooling in Finland. The focus is on the roles of the representative democracy and the civil society. Free and public basic education, a common school, was one of the core items on the political agenda in Finland after the World War II. The project of equal opportunity through a comprehensive basic education was carried out by the builders of the welfare state. A change took place in the end of the 1990s, when new school political actors questioned the pursuit of educational equality. Instead, an individual opportunity was to be served by schools. A question arises, whether the new policy depended on a change of actors running the school politics.

Introduction

The ethos and organisation of basic education were radically transformed in the end of the 1990s. In Finland, like in many – not all – Western countries, the traditional project of educational equality

was replaced by neo-liberalist politics. Like historical changes as a rule, the transformation depended on new historical actors entering the field of politics. The new actors became agents of change. The historical agency in school politics will be studied here in order to account for the marketisation of school.

A Planning State as the Prime Actor of the Comprehensive Reform

A “*Planning State*”

The project of an equal opportunity in education was paramount in the post-World War II era. Education played a vital role in the social reconstruction after the war. In the Nordic countries the period was marked by a great trust in state planning. State-organised planning was regarded a necessary tenet of equal opportunity, e.g. in education. It was natural that the central state organs would be the paramount actor in the development of schooling.

In the Nordic countries, the period 1945–1980 is often characterised as the social democratic era (see e.g. Slagstad 1998). Social democrats held the political powers for most of the time, especially in Sweden and Norway. The Nordic social democrats were disciples of John Maynard Keynes and believed in the necessity of state intervention for the sake of universal welfare, economic stability and economic growth. Consequently a great trust in social engineering ruled. Society was considered to be manageable and improvable through structures like an adequate basic schooling.

The welfare state consisted basically of universal access to free health care, family allowances, old age pension and a comprehensive school, all of were supposed to expand the welfare and the equality of opportunity and therefore contribute to economic growth (Kuusi 1960; Oittinen 1972). The states undertook comprehensive school reforms, Sweden in 1957 and Finland in 1967.

The political parties, proportionally represented in the parliament, were the main actors of the building of the welfare states during the 1960s and 1970s. The electorates were active – the percentage of those giving their vote was over 80 – as there was welfare to be gained through voting. In the multi-party systems of the Nordic countries the parties ranged from the communists on the left to national coalitions on the right.

In Finland, the parties became active in school politics only gradually in the 1960s. Before the school reform depended on a few social democratic bureaucrats in the National Board of Education. The left was first alone in the pursuit of an extended educational equality. The political centre, which in Finland was dominated by the Farmers' League, kept firmly to the old elementary school. The farmers maintained that the six years of the elementary school were a sufficient amount of education for the children in the countryside. Finland was still an agrarian country. The political right, on its behalf, was committed to a two-tier education and defended the selective grammar schools. The right repeatedly expressed its concern for the quality of education. Since the period of nation-building, the need to educate a national elite for the creation of a national high culture had been used as an argument for a two-tier education.

After a decade of preparation in the National Board of Education, led by a strong social democratic leader, R.H. Oittinen, the comprehensive reform was submitted to the parliament in 1967. Four years earlier, a motion had been passed in the parliament about the necessity of a socially just school system, but the parties had been deeply divided about the matter. Between 1963 and 1967, however, the Farmers' League changed its position. Finland was going through a record rapid urbanisation, and a radical change of the occupational structure of the population took place. It became eventually obvious to the farmers that the old elementary school did not suffice for the young people.

Even the right wing national coalition admitted in 1967, that “the existing school system did not satisfy the educational needs rising out of the new scientific and technological standards of the society”

(Poliittinen käsikirja vuodelle 1967). The party thus gave up its traditional defence of the elite education and the grammar schools.

The comprehensive reform was approved in the parliament by a broad consensus. The consensus was to a certain extent based on pragmatics: the left – social democrats and communists – had gained a landslide victory in the parliamentary election of 1966. Even the right considered it wise to compromise about its principles and moderate its conservative standpoint in the school issue. The main tenet of the success of the reform was, however, the change of mind by the centre, The Farmers' League. The change was based on a reality-based reorientation.

In the process of the making of the law of the comprehensive school, the effort of the legislative to overcome the hesitant executive deserves attention. The governments throughout the 1960s had hindered the reform, through neglecting the preparation of a proposal for a bill. Until 1966, the governments were led by the political centre, as both the left and the right were considered not suitable for ministerial posts. The communists were unreliable, and the social democrats together with the rightist national coalition were not acceptable to the Soviet Union. Until 1967, the parliament discussed the school reform only on the basis of motions by individual members of the parliament. It was only when the social democrat R.H. Oittinen in 1967 was made into a secretary of education, as the Bill was proposed to the parliament by the government.

However, the political system eventually proved capable of meeting the requirements and demands of the changing society. The Nordic phenomenon 'the social democratic era' was not fully true in Finland, where the school reform was a result of a political consensus rather than of a social democratic hegemony. The consensus was backed by the social reality: the standard of education among the broad masses was relatively low. A further postponement would have been fatal to the society

The Role of Civil Society

The comprehensive reform succeeded under the auspices of a planning state. In the pursuit of universal welfare the state planned and implemented a nine-year long universal basic school. The state, however, used beside its representative apparatus a tool that to a minor extent enabled the participation of interest groups and civil society in the process. The tool was the state committees.

Committees flourished during the period of the planning state. Every reform was preceded by a couple of years of committee work, consisting of preliminary scholarly investigations and broad deliberations. There were two kinds of state committees depending of whom were invited to be the members: expert committees and political committees. The crucial basic school committee 1963–1965 was mixed. It consisted of representatives of the five main parties – including the communists and the national coalition – as well as of scholars of education, teacher unions and the spokesmen of rural and urban local authorities. Leading role, however, was played by the bureaucrats from the National Board of Education, who organised the necessary investigations. Politicians and interest groups were overshadowed by the experts. The committee report incorporated six statements of a deviating opinion, two of which were in favour of the traditional selective two-tier school system and two in favour of an inclusion of vocational education in the comprehensive school.

The role of the civil society in the making of the comprehensive school was weak. Among the interest groups only teacher unions were active. There were two unions; one for elementary school teachers and the other for grammar school teachers. The first pursued a comprehensive reform, while the other defended the old two-tier school system. The teacher unions were active in the public. The debate was at times fierce. Especially when the fate of private grammar schools was at stake, the discussants used strong metaphors like ‘socialist revolution’ and ‘the totalitarian nomenclature’ – the latter referring to the social democratic school administrators.

The broad civil society – the representatives of parents, ethnic minorities and labourers – chose to keep silent. The comprehensive

reform took place under the auspices of a planning state and in the context of the making of the welfare state. The political decision-makers used their mandate to do what they considered best for the big society. The result was a 9-year-long universal basic school that provided an equal opportunity for further education for all, not least through its uniform curriculum.

In the 1960s, the political will for an equal opportunity in education was materialised not only in the institutional expansion and broadening of basic education. In order to enable all children to do well in the common school, different modes of social care were introduced to the schools. Remedial teaching was made available in all schools. Moreover, a democratic pupil participation in the governance of schools was attempted – but soon rejected, as the teachers feared that their professionalism would be disregarded (Kärenlampi 1999, 180, 227). The achievement of the comprehensive reform can be judged through a look at the proportion of adequately educated people after one generation of comprehensive school. When in 1960 only one in five had any general or vocational education beyond the six years of the elementary school, in 1990 the situation was the opposite: only one in five did *not* have such education.

The Agents of the Transformation of the Common School into a School Market

A New Course and a New Actor

A reorganisation of the actors in the 1980s and 1990s caused a turn in school politics. Through new laws and decisions in the early 1990s market economy was introduced to the Finnish school system. Therewith, a new understanding of educational equality appeared.

In the 1980s, the central organisation of industrial employers (since 1992 The Confederation of Finnish Industries and Employers) entered school politics as a new actor. The activation of entrepreneurs in school politics was an international phenomenon. In the US

the entrepreneurial leaders together with the military leaders 1983 published a pivotal document “Nation at Risk”, where the American school system was asked to secure the competitive capacity of the people. In Britain the industrial leaders proposed to the Thatcher government collaboration for school betterment and asked the schools to be freed from the control of local authorities, most of which represented Labour (see e.g. Tomlinson 2001, 33).

In Finland, the common school was submitted to a severe critique by the entrepreneurs. First, the accusation was focused on the curriculum: the basic school was blamed for not teaching entrepreneurship but instead educating people into passive wage-earners. Secondly, the public spending on school was questioned: the state schools were accused of wasting taxpayers’ money and asked to be cost-effective and accountable. The entrepreneurs asked if the comprehensive school with its egalitarian ethos belonged to the past. The accusations and questions echoed the voice of the equivalent leagues in the US and the UK and adhered to neo-liberal theories. Scepticism about the possibilities of the common school to create equal opportunity was expressed. A school that would let the young people to train their competitive capacity was asked for.

The impact of the entrepreneurs’ actorship was soon visible in school politics. Their aspirations were in the early 1990s present in the policy documents of both The National Board of Education and The Ministry of Education (Vähänen 1998). Members of the industrial lobby were also affiliated to the board of directors of The National Board of Education.

The Devolution of Educational Planning

One of the new pursuits in the 1980s was the devolution of the decision-making from the central governmental offices to a local level and actual grass-root actors. The old social democratic model was considered too centralised and bureaucratic. Deregulation and decentralisation were expected to bring new initiative and empowerment to the actors (Committee report 1986). Several of the

powers and tasks of The National Board of Education were delegated to local authorities and individual schools. However, following the neo-liberalist demand of accountability, the schools were submitted to national tests. Schools were made to compete with each other.

Committees disappeared from the new power structure. They were considered one of the hindering structures of the old world, as they had worked on their own premises without a dialogue with society. Now the bureaucrats were expected to work with their doors open to the civil society.

The National Board of Education started in 1992 to plan a new curriculum for the comprehensive school and declared that it would keep the civil society informed of the process and promised to be receptive to feedback. A big number of schools were invited to send regular feedback on the new plans, which included a great freedom to schools to decide about the content of the curriculum. The Finnish school would transit from one of the most centralised systems to an extremely decentralised and deregulated school. The belief in social engineering was out, instead a great trust in teachers' and students' autonomy and competitive enterprise ruled.

Somewhat surprisingly, the feedback from the schools and such interest groups as the trade unions and the church asked for the solid institutional identity for the school to be preserved. Moreover, equality of opportunity was cared for. The educational scholars were divided in their response, some defending the egalitarian ethos of the 1960s, and others speaking of accountability. The central organ for local authorities supported the claim for accountability. The entrepreneurs concentrated on demanding both accountability and pedagogical autonomy, and because of their new influential position managed to convince the bureaucrats of the Board. The economists introduced the rules of the market to the school. The schools and students would in future compete with each other.

The national curriculum of 1994 is an example where the new openness of the bureau could not make up for the broad civil interests previously provided by the state committees. In the new system, the bureaucrats registered but in many cases eventually ignored what

was offered as feedback. Educational planning seemed to have been bureaucratised instead of becoming open for deliberation.

Synchronically with the making of the new national curriculum by the National Board of Education, the parliament had passed several single laws that deregulated the both the economy and the pupil recruitment of the schools. By 1995 it was obvious that the new laws had to be harmonised and codified. At this stage the Ministry of Education considered a politically and civilly representative committee necessary. The committee was established. It invited more than three hundred representatives of the civil society to take stand for or against the deregulation and marketisation of school. The standpoints varied. The teachers' union defended equality of opportunity, while the spokesman of the local authorities supported the deregulation that would enable a local authority to decide about the money spent on schools.

The committee published a proposition for a new codified school legislation. As the main rule the committee supported decentralisation and deregulation. The proposed laws no longer spoke of 'basic school' as an institution, but of 'basic education' as a network. The committee thus supported the devolution of educational decision making, despite of the deviating views it had received from various groups of civil society.

The devolution had already become reality by the end of the 1990s. The local authorities could to a remarkable extent decide about the resources of the schools, and the individual schools had a lot of curricular power. This was the situation when the representative democracy through the state government and the parliament took charge of the development.

The Role of the State after the Devolution

The government who proposed the committee-prepared bill for a reformed school legislation to the parliament was a coalition ranging from left to right wing parties. The biggest centre party, the Centre (formerly the Farmers League) was not included, and consequently

constituted the core of parliamentary opposition. The collaboration of the social democrats and the right wing national coalition in school politics meant a split among the political left. As the Centre had collaborated with the National Coalition in the ripping down of the common school in the early 1990s, its opposition was not expected to be too strong. The relations of the parties were volatile and complex. The standpoints of the parties were not easy to foresee.

In 1997–98 an ideological battle arose in the parliament. First the opposition, the Centre, defended the traditional recruitment of pupils by means of school circuits. The existing dense school net was threatened by the new deregulation. The removal of the school circuits caused closures of small village schools and regional equality suffered. In cities the schools would compete for pupils and resources, and become polarised in regard to the quality of education. The Centre was soon supported by the left. Even a few social democratic members of the parliament joined the Centre in the critique of the proposed Bill. In the education committee of the Parliament the Bill was substantially changed, not least through securing a subjective right for a child to enter her or his neighbourhood school. After all, the school system did not become completely marketised.

The education committee reclaimed some of the education power back to the parliament. The parliament discussion on school became long and intensive. While in the early 1990s the crucial deregulatory laws had been passed without any proper discussion, in the end of the decade the parliament effectively challenged the executive as an actor in school politics. Democracy was thus reinforced.

The Role of Civil Society

The awakening of the parliament in school politics was accompanied by the activity of civil society. The whole society was shaken by economic crisis in the early 1990s. The cuts in public spending harmed school work and mobilised parents and teachers. In demonstrations the basic school was brought to a public attention. The school was considered one of the indispensable public services. The closing of

small village schools in the countryside raised protests from local people. The parents organised themselves as a national union that rose to criticise the inequality in the educational services of the local authorities.

The media worked as an open forum for the educational concern of civil society. In the national press the ordinary people expressed their doubts about free parental choice of school and their concern for the vague organisation of pre-school education and social care by the schools. At the same time the forum was open also to the neo-liberalist project. For instance, the biggest national paper in its editorials defended the marketisation of the basic school through free parental choice. The editors argued that a free competition would improve the quality of the schools. Thus the arguments of the opposite sides, the neo-liberalists and the welfare-state supporters, were presented both in the parliament and in the media.

The civil society resumed its traditional role as a critic of the state apparatus, as the latter did not seem to be sensitive enough to the growing inequality caused by deregulation. The civil society proved able to react to the representative democracy, when the latter was not felt to serve the welfare of the whole of the society.

As a whole the new market school of the 1990s did not enable the same practices of equity as the uniform common school of the 1960s had provided. The deregulation and decentralisation of the school management caused many local authorities to cut social care and remedial teaching. In one town the young children had an access to organised post-school day activities while another municipality did not provide that. Equal opportunity through education was no longer paramount on the local agendas.

To Sum Up

Finnish basic school was submitted to two pivotal reforms during the second half of the 1900s, namely the comprehensive reform of the 1960s and the making of the basic school into a school market in the

1990s. When comparing the actors in the school politics of the 1960s to those of the 1990s, a change is observable. Relationship between the representative democracy and the civil society in the period of the building of the welfare state was different from what it had developed into in the post-industrial Finland of the 1990s. The organisation of the state apparatus and the structure of the party-institution had stayed the same, but the roles of the actors were different. Difference is crucial when studying the school politics in regard to equal opportunity of education.

Finland of the 1960s was a remarkably state-centred society. The making of the comprehensive school depended on the initiative by the parliament and on the power relations of the political parties. Only when the balance of power in the parliament had changed to the left, the necessary legislation for the comprehensive reform was possible. However, while equivalent reforms in the neighbouring Nordic countries resulted from a social democratic hegemony, in Finland the reform was achieved through political consensus.

Civil society was neither loud nor active during the comprehensive reform. However, the civil society was represented within the institution of the state committees. The state committee that built the necessary arguments for the reform consisted of school people, educationists, the main political parties, the language minority (the Swedish speakers) and the spokesmen of the local authorities. However, it did not incorporate all the groups concerned. For instance, the ordinary parents, trade unions and ethnic minorities were not represented. A spontaneous reaction from the civil society was missing. Compared to the numerous strikes that had accompanied the decision-making of the other aspects of the welfare state, the school was mainly left to the official representative bodies to decide. The school reform was performed under the auspices of a planning state.

By the 1990s the representative democracy lost a part of its credibility. In the elections only 60% of the electorate voted, compared to the 80% in the 1960s. The mandate of the parliament was therefore weaker than before. During the 1980s the school politics had lost its former strong position in the agenda of the parliament. In the

early 1990s the crucial laws that led to the marketisation of school were passed without any active debate. The school politics were to a remarkable extent left to the executive powers to run. The National Board of Education and the Ministry of Education were the crucial actors.

There was a novelty in the way the executive worked in the 1990s. The decisions were supposed to be accompanied by a broad civil deliberation. What happened, however, was that the bureaucrats, after having listened to a vast number of interest groups, tended to choose the views of the economically most powerful groups. This was most obvious when decisions about school curriculum in the National Board of Education in the early 1990s were taken.

The civil society was mobilised only after an economic crisis had shaken the country. The parents organised themselves, and the ordinary people woke up to defend the structures of the welfare state, including the free universal access to basic schooling.

The activity of the civil society in the street and in the media affected the parliament and encouraged it to resume its power in school politics. A broad debate about school took place in the parliament in the end of the 1990s. No consensus about the marketisation of the school any more prevailed. The common school as one the vital structures of the welfare state was defended and eventually saved from an extreme neo-liberalist restructuring.

The awakening of the civil society and the resumption of the powers by the parliament took place, however, somewhat late. Beliefs and structures in favour of a marketised school were already established. Thus, at the turn of the millennium, the truly common school had ceased to exist in Finland. The competition-based unequal financing of schools threatened an equal opportunity in education. This was due to a failure of democratic actors to acknowledge their responsibility for the school politics in time.

Changes of actors in school politics from the 1960s to the 1990s have been reflected in the degree into which different policies of equity have been practised in schools. The new principles of autonomy and accountability in the 1990s tend to hinder and endanger the traditional

practices of equity. The individual municipalities are today challenged in regard of equal opportunity in education. Also on a local level it matters, who the actors in running the schools are. Local civil society shares the responsibility for education.

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CONFLICTS BETWEEN CONCEPTIONS AND PRACTICES IN THE PROCESS OF PUBLIC FOUNDED INDEPENDENT¹ SCHOOLS IN SWEDEN

ABSTRACT

This article analyses the conflicts between the National Agency for Education and fourteen municipalities in regard the practices for approval of the establishment of independent schools in Sweden. Nineteen records from the National Agency for Education were used for text analysis concerning these practices during the period 2002–2003. These records include the pronouncements with regard to these establishments from the municipalities, the National Agency for Education, the national courts and the involved independent schools. The analysis of these conflicts exemplifies the redistribution-recognition dilemma present in the concepts of equity, social justice and equivalence. For some actors the opening of independent is an instrument to develop diversity and cultural justice. For others,

¹ In this article the term “independent schools” refers to the schools that are not public. The translation of the Swedish “fristående skolor” to “independent schools” is used in this paper following the translation praxis used by The National Agency of Education. The Ministry for Education used both the terms “private schools” and “independent schools” to refer to the Swedish term “fristående skolor”.

the growth of independent schools can be seen as the gradual disappearance of public schools as a common sphere to all citizens. By closing or reducing common public spaces, there is a risk to have higher segregation and inequality in Sweden. The analysis of the redistribution-recognition dilemma is necessary in order to become aware of how much we are ready to lose of the right to equality in order to obtain an increase of educational diversity.

Introduction

During the 1990s, the concept of equality disappeared from the educational political documents in Sweden. The idea of a school equal for everybody was replaced by the concept of an 'equivalent' school, including both the demand for minimum knowledge results and a similar educational standard for all pupils, such as the free choice of school, contents and methods. While the concept of equivalence has become increasingly relevant within the Swedish educational discourse, at the international level, the concept of equity (England 1999; Francia 1999; Wallin 2002; Skolverket 2003a) over that of equality (Benadusi 2001; Feijoo 2002) has gained more validity. Although in the Swedish discourse, equity is not used, it is interesting to point out that in some aspects the concepts of equity and equivalence are similar. When considering both, we are faced with the dilemma between the demand of a certain level of equality and the appreciation of diversity and differences

Both concepts can be considered as multifaceted and contextual. Gewirtz (2004) indicates that educational equity includes different internal dimensions that are frequently in conflict and respond to different ways of influencing and conceiving educational equity in different contexts and levels. A study about the concept of equivalence in compulsory schools in Sweden during the 1990s (Francia 1999) shows how this concept includes different meanings, both in school practice and in educational policy. These meanings are sometimes complementary and sometimes contradictory. In the same educational

reform equivalence thus means equality of opportunities, equality of resources, equality of results, equality of education standards and free choice.

Therefore, I will use both concepts in this article interchangeably, because when we speak about an equivalent education in the Swedish context or an equitable education in the international context, we are faced with the same phenomenon. When we speak about an equivalent education – or an equitable education – we are making reference to the need of reconciling with a certain degree of equality for all citizens while respecting and evaluating their individual, social and cultural differences.

These characteristics of the equity and equivalence concepts meet the international discussion (Fraser 1997; Cribb & Gewirtz 2003) about social justice as a multifaceted phenomenon since it includes several meanings at times contradictory and at other times complementary, such as the right to an equitable distribution of property (distributive justice) and the recognition of cultural and social differences (cultural justice). As Fraser (1997) has pointed out, the social justice concept includes a redistribution-recognition dilemma that is not always easy to solve in the practice.

The multifaceted and contradictory aspects of equivalence, equity and social justice reflect the conflicts arising among the educational practices that favour the implementation of basic and universal goals and values for the whole educational system and the educational practices that favour free choice within the school reform itself.

This article analyses one of these educational practices: public funding of independent schools authorized by the national government.² The opening of independent schools is an interesting

² The Swedish school law (SFS 1997:1212) establishes as a condition for the setting up and for the public financing of independent schools that: a) the school follows the goals and basic values established in the national documents enacted for the Swedish public school; b) the school is open to any child (However there is an exception as to the requirement of access equality and it is applicable when the attention the child deserves makes the independent school suffer economic or organizational problems. Compulsory independent schools with municipal financing are not allowed to collect a fee from its pupils, being its financing based on municipal subsidies like public school); c) the school counts on the necessary conditions to carry out the educational activity for which it has been authorized; d) the school has at least

example of the dilemma between the equal distribution of property and the recognition of diversity and differences. This national government practice obliges the municipality to fund the independent schools. This obligation has created conflicts between both the municipal and national levels as municipalities have no decision whatsoever over the opening of independent schools. This article analyses how these conflicts respond to different ways of conceiving and implementing the right of an equivalent, equitable and fair education for everybody and how those different conceptions are dealt with in practice.

Cribbs & Gewirtz (2003) point out the lack of scientific research analysing the conflict existing among the different social justice conceptions with a critical and practice-oriented perspective. For Cribbs & Gewirtz the scientific analysis taking into account the multifaceted character of social justice should not only study the social and cultural reproduction mechanisms, but above all contribute to the endorsement and analysis of educational activities that in practice can interrupt and challenge processes of social injustice.

This perspective concerns itself not only with documenting and explaining social and cultural reproduction but with documenting, analysing and contributing to struggles that are concerned to challenges and interrupt these processes. This is in part because, if we focus only examples of reproduction and injustice, this can itself act to inhibit the cause of justice by presenting, reproduction as somehow inevitable. But it is also because it is only by analysing examples of practices aimed at promoting social justice that we can explore how tensions and conflicts might be overcome or accommodated in reality. (Cribbs & Gewirtz 2003, 22.)

20 pupils, except for certain special reasons that could justify a shorter quantity of pupils; e) the school's staff is trained according to the law, except for the cases in which it is not possible to hire specialized staff; f) the school meets the requirements demanded by the government as far as student admissions, school direction and education provided in the school facilities is concerned. The National School Board has the responsibility to supervise the independent schools as well to decide the closing of independent schools not meeting the legal requirements after their setting-up.

Although I agree with Cribbs & Gewirtz (2003) concerning the importance of the analysis of successful educational practices, I would also like to point out that our success at evaluating the effectiveness of fair or equitable practice depends on our initial definition of social justice or equity. Therefore, I would like to point out the need to consider first the documentation and analysis of successful educational practices and that the criteria by which these practices are selected also are contextual. For such reason, the objective of this article is not that of analysing educational processes that may permanently cancel or universally interrupt the existence of unfair, inequitable educational practices or those practices opposed to the right to equivalence. On the contrary, with the analysis of educational practices presented in this article, I would like to contribute to an in-depth reflection within the academic environment and in the educational practice about the existing conflict between the achievement of a certain fair educational level for all citizens and the respect for diversity.

In order to be able to understand the implications of the different practices related to the opening of new independent schools with total public funding as regards equity, equivalence and social justice, I will first describe the study I performed and show the results. The analysis of the results, with a theoretical discussion about the current reassessment of the diversity and consequences of the education system regarding equity, equivalence and social justice appears hereinafter. Finally, I will discuss the possible consequences of the opening of independent schools on the survival of the Swedish public school system.

A Study about the Conflicts between Municipalities and the National Government

Description of the study

This study³ is based upon the selection of records from The National Agency for Education regarding the opening of independent schools setting up records of independent schools registered in the files of the National Schools Board. During November and December of 2003, 19 out of 263 records from the year 2002 and the first half of year 2003 were selected. The selection criteria consisted of those cases where conflict between municipalities and the National Agency for Education was noted regarding the opening of independent schools at the municipal level.⁴

Among the arguments presented by the municipalities against the establishment of independent schools, those related to the negative effects on the municipal economy (12 cases) and the reduction in pupil enrolment in public schools in the following years (7 cases) stand out. The records also point out the difficulties facing independent schools related to the hiring of qualified personnel (2), the decline of educational quality at the municipal level (4), the inspection of independent school is more limited than the inspection of democratic organizations as for example public schools (1) and the increase of segregation (4).

Municipalities also point out the difficulties to foresee the effects of opening an independent school on the municipality's economy

³ This study is a part of the three-year project *What about equivalence? The concept of equivalence and its different interpretations in different contexts, at different educational policy levels and in different school practices*, 2003–2005. The project is financed by the Swedish Research Council.

⁴ The study comprises the opening of primary independent schools, special schools and preschools, as well as the request for municipal funding from the following Swedish municipalities: Kalmar (1), Helsingborg (3), Örebro (3), Västervik (1), Härnösands (2), Örnköldsvi (1), Nybro (1), Älvdalens (1); Landskrona (1), Boden (1), Malung (1), Stockholm (1), Torsby (1), Kiruna (1).

and on the quality of education in public school (3), the budgetary deficiencies presented by the independent schools in their applications (2), the lack of school facilities (1), the limitation to the pupils' choice about the elective subjects (1), and their failure to comply with the legal requirements such as the minimum of 20 pupils.

The arguments presented by the National Agency for Education to justify the approval the opening of independent schools and to reject the arguments against such opening posed by the municipalities are as follows: municipalities have not been able to show that the opening of an independent school may have negative long term consequences on the municipal economy (17), the independent schools comply with the legal requirements to authorized their opening (10). In one case the National Agency for Education-stated that the municipality did not openly oppose to the creation of independent schools (1). Another argument presented is that independent schools are not the reason for segregation of any group within the municipality (2). The National Agency for Education grants the licence to open an independent school, even to those schools that do not meet the legal requirement concerning the minimum number of pupils, while the municipalities demand fulfilment of every requirement (2).

Four records also included the municipal appeal before the courts against the authorization to open independent schools issued by the National Agency of Education. The courts reject the appeal in three of the cases and accept the decision of the National Agency for Education (3). Only in one case, the Court rules in favour of the municipality. In this case, the approval is only a partial one, and is restricted to the municipal decision of not subsidizing the opening of an independent school.

The records analysed showed that in most cases municipalities oppose to the opening of independent schools while the National Agency for Education authorizes it. However, we find an exception in the Stockholm municipality where there is a positive attitude towards the opening of independent schools at the same time that the National Agency for Education does not authorises it on the grounds of planning, economic and administrative deficiencies.

Different Interpretations of the Results

In this part I suggest to analyse and discuss the different ways of influencing and conceiving the opening of independent schools observed in the results of this study. The results serve as examples to create a better understanding of the contextual framework and multiplicity of the concepts of justice and equity-equivalence. With this analysis I would like to approach a dilemma, present in the Swedish education system, between the attainment of a certain educational level that is fair for all citizens and the respect for diversity.

Diversity at the Expense of Distributive Justice

The approval of independent schools by the National Agency for Education- without taking into account the municipal opposition must be analysed within the political-legal framework of reassessing diversity prevailing in the current Swedish education system.

As a reaction against the hegemonic and egalitarian policy dominant in Sweden during the 1960s and 1970s, a reassessment of the cultural and individual differences among pupils as well as the free choice of schools and methods emerged during the 1980s. From that moment the Swedish educational political documents would not include an explicit demand for a public, equal and common school for all citizens. The concept of educational equality will be then replaced by the concept of equivalence. This will facilitate the implementation of an educational policy based on free choice and decentralization.

Within this political framework which favours freedom of choice, the social democratic government passes proposal SFS 1995/96:200 ruling the opening of state funded independent schools. This proposal asserts that free choice of schools is positive and fully compatible with the demand for a system equivalent for everybody. Here, the value of diversity is emphasized as an instrument to implement the right to equivalence. Thus, independent schools are considered as institutions that contribute to diversity within the education system. Furthermore, the proposal sustains that diversity of forms and types of schools is

also compatible with the demand for high educational standards. Consequently, through broader discussion spheres and actions, the ultimate aim is the right to equivalent education for all.

The practice of the National Agency for Education is characterized by the subsequent authorization of any independent school which strictly fulfils the formal legal requirements. If the independent schools meet the legal requirements, municipalities have no valid argument against their opening.

Municipalities usually claim higher expenses due to the cost of facilities and maintenance of independent schools or due to the bad use of the municipal school facilities taking into account the quantity of pupils in that municipality. Notwithstanding, this type of negative consequence is rejected as a valid reason by the National Agency for Education as no long-term evidence is shown supporting such expenses. It is however interesting to note that none of the decisions of the National Agency for Education or of the Courts against the municipalities gives a clear picture of the long term consequences. This lack of accuracy in the demands made by state authorities can be attributed to a legal gap related to time limits through which it is possible to evaluate long term and short term consequences.

In the case of Torsby municipality, the National Agency for Education considers the deterioration of the municipal economy and consequently of public schools as a consequence expected to be foreseen due to the opening of a new independent schools. Since this kind of deterioration is considered as a short term consequence, it is not a valid reason to reject the opening authorization. Therefore, the price to be paid at least in the short term scenario is a reduced distributive justice in order to increase diversity in the Swedish education system.

By consequently opposing the predictions of negative consequences stated by municipalities, the decision of the National Agency for Education raises doubts about the real autonomy of the municipalities in the management of its own economy.

An example of the subordination of the municipal autonomy to the demand posed by diversity and freedom of choice is the case of

the Västervik municipality. This municipality planned an expense reduction for special education centres due to a possible one third reduction in student enrolment between the period ranging from 2001 to 2010. This reduction in education centres would allow for an economic redistribution policy that was to benefit the most disadvantaged municipal areas, such as health care for the elderly. Being forced to finance the opening of an independent school, the Västervik municipality found it impossible to allocate resources as it had been planned.

We can thus verify that the demand for educational diversity present in the national political and legal framework plays a more important practical role than any attempt from the municipal authority to attain a distributive justice policy in favour of disadvantaged municipal areas or to mend the municipal economy in crisis. This implies that today privatisation in Sweden has a stronger influence than decentralization by municipal steering as regards the opening of independent schools.

Independent Schools as Subaltern Counter Publics

While the opening of independent schools can be considered a threat to the possibilities of the municipalities to carry out distributive justice as far as public schools and the municipal economy are concerned, the creation of independent schools can be seen as an effective instrument to attain cultural justice.

By the end of the 1980s the standardized and equal education policy characterizing the Swedish school system was strongly criticized for not taking into account the cultural and individual differences among pupils and because it failed to provide equal education. According to Sjögren (1995), the social and cultural homogeneity policies and the foundation of the welfare society after the Second World War, paradoxically hampered the progress of ethnic minorities in Sweden. At the same time, equal education policies for foreign pupils led to an increase of school segregation, as they considered the foreign child as a problem (Lahdenperä 1997).

However, the tradition of cultural and educational homogeneity policy is interrupted by the 1990s neo-liberal reform that promotes the right to choose schools. As a result, a new legal framework provides the public funding of independent schools and at the same time forbids all independent schools funded by the State to have school registration fees. Once again, through education reform an attempt is made to assure a certain level of standard equity by demanding state-funded independent schools to meet the national education goals established in the curriculum as the basis of the Swedish school system. From this point of view, we could consider the public funding of independent schools as a tool to promote cultural justice and equity in Sweden since it makes a plurality of educational offers available and puts an end to the educational hegemony of the previous decades.

Within this educational reform framework we can understand why the National Agency for Education rejects requests from municipalities to open independent schools. They intend to assure the promotion of a wider cultural justice in the Swedish society by preventing the monopoly of public schools in the educational sector.

This interpretation matches Fraser's arguments (1997) in favour of multiple public spheres. Fraser states that the existence of a unique public sphere puts cultural justice at stake because the existence of conflicts and exclusions is frequently denied by this public sphere.

Accordingly, the existence of multiple public spheres works as a guarantee to create a more equitable society:

We should question whether it is possible even in principle for interlocutors to deliberate as if they were social peers in specially designated discursive arenas, when these discursive arenas are situated in a larger societal context that is pervaded by structural relations of dominance and subordination. (Fraser 1997, 79.)

Although according to Fraser (1997) not all alternative spheres are always democratic or egalitarian, they are not exempt from exclusion and marginalisation mechanisms of their own. These alternative spheres are necessary since they show social and cultural injustices.

Fraser considers the liberal model of the unique public sphere inadequate since it does not demand social equality as a necessary condition to take part in the deliberation process. In this manner, the deliberation proposal of the liberal model can serve as a mask for a domination strategy.

Fraser considers that the existence of a unique public sphere based on a mutual consensus and recognition of common good and values previously established has historically worked against excluded and marginalized groups. On the contrary, the existence of alternative public spheres implies the presence of opposing ideas.

However, according to Fraser (1997), the existence of public spheres should not only be restricted to weak public spheres as this type of sphere is restricted to create different opinions without participating in the decision-making process. On the other hand, Fraser (1997) proposes the need to create “strong public”, that is: publics whose discourse encompasses both opinion formation and decision-making.

With Fraser’s arguments in favour of multiple public spheres, Abowitz (2001) legitimates the existence of the “charter schooling” in the American education system. According to Abowitz, Fraser’s demand to integrate economic redistribution and cultural recognition through the creation of “subaltern counter publics” can be applied to the analysis of charter schools. Thus, charter schools can be considered:

[– –] sites for remediation of longstanding injustices afflicting non-white and poor students in traditional public schools. (Abowitz 2001, 1.)

However, according to Abowitz it is important to take into account the risk that “charter schools” may fall in the hands of profit-oriented companies instead of organizations oriented to achieve educational equity for the already marginalized groups in the traditional public school.

The appraisal in favour of the creation of independent schools as “strong subaltern counter publics” is also shown in the material

analysed in this study. Therefore, we can see that the authorities of an independent school, the opening of which the municipality of Kalmar opposes to, defend the request against the municipal opposition arguing that the school can work as another alternative to choose from the limited offer options of public schools. Since this independent school is focused only on special education, it could mean an alternative option for parents not wishing to send their children to a public school because the latter only offer special education integrated with regular education.

Thus, when studying the practices we understand the opening of independent school – legally required to achieve the objectives and values established by the Swedish public school system and without the right to charge an enrolment fee to its pupils – as a way of promoting the plurality of public spheres. This plurality could be a positive measure to increase social justice and equity in groups traditionally left out of the unique public sphere.

The fall of the public school system?

Although it is true that the disappearance of municipal schools as the only public sphere can be seen as a way of increasing the multiplicity of public spheres in order to include previously excluded or marginalized groups, we can also see the disappearance of this unique sphere as a threat to social justice and educational equity.

Gamarnikow & Green (2003) show that in the name of an apparent diversity as instrument of social justice, England has implemented a neo-liberal education policy that has made it impossible to generate economic redistribution. This policy is characterized by two diversification ways: “specialisation” and “beaconisation”:

Specialisation is concerned with increasing the horizontal diversity of schools and institutionalised school identities [– –]. Beaconisation, by contrast, is about recognising an explicit and unambiguous hierarch of schools, identified and ranked on the basis of excellence,

managerial and/or pedagogic, as well as 'results'. (Gamarnikow & Green 2003, 214.)

Although this diversification of the English education system has been made in the name of social justice and educational quality, the interaction of these two diversification ways has strengthened the revival of social and economic injustice in the English society:

It is difficult to envisage how such a system of stratified schools, located in education markets and articulated with the wider processes of power, can produce anything but unequal outcomes, disguised as organic diversity and specialisation, while in reality consolidating further the already existing social class and education hierarchy. (Gamarnikow & Green 2003, 220.)

In the Swedish education system we can find certain similarities with the two types of diversification, specialisation and beaconisation, registered by Garmarnikow & Green (2003) in the English education system. By diversifying the education options and, at the same time, creating a hierarchy among different types of schools, Sweden also faces the risk to increase social injustice and inequality.

As we have already mentioned, the arguments of the municipalities against the opening of independent schools are mainly focused on the negative economic effects that would affect public schools. In this case the municipal opposition starts from a consideration of the notion of distributive justice, through which the proliferation of independent schools would imply a risk for the national education standards and the well functioning of municipal schools. This flight of resources and pupils to independent schools would cause the social and economic marginalisation of public schools, which consequently would convert them into second-class education institutions. For municipal decision-makers, putting equity into practice would imply prioritising public instead of independent schools, and therefore preventing their social, economic and educational impoverishment.

In the result of my study I can see that those municipalities opposing to the opening of independent schools in their jurisdiction frequently point out the risks of an increase in the social and economic inequalities and a consequent increase of segregation in the Swedish society. At the same time, the National Agency for Education consistently rejects those arguments due to the incapacity of the municipal authorities to show a detailed description of the negative effects that such openings would have on the municipal economy in the long run. At the same time, the National Agency for Education does not state in its declarations the way in which municipalities should state the long-term effects and the means by which these effects should be informed.

This result confirms the conclusions of a previous report from the National Agency for Education (Skolverket 2001a) indicating that municipalities face important difficulties to show long-term estimations that have also been duly completed and corrected. For such reason, it is necessary for municipalities to present clear and detailed reports including the negative consequences together with a statistical and cost analysis, and other relevant information. The National Agency for Education cannot take into account the declarations that only confirm the existence of the negative consequences in general terms. It is not enough to show the short-term negative consequences, consequences should only be considered in the long run. However, the report does not point out the period that a long or short term would comprise. It only states that the declarations of municipalities are usually very short or lacking information and statistical analyses about said consequences. The National Agency for Education points out at the same time the political character of some municipal statements that are not motivated of an analysis of the consequences in the long run, but of an ideology of the political majority that consistently opposes to the privatisation of the educational system. Another cause could be the frustration municipalities feel when considering that their statement cannot revert the decision of the National Agency for Education. A third reason could be the lack of municipal resources and personnel to make detailed statistical analysis.

Taking into account the importance of the form municipalities show long-term negative economical causes, it is interesting to highlight that the National Agency for Education (Skolverket 2001a) indicates the generally existing difficulty (not only for municipalities) to make long-term predictions.

The difficulties to make long-term predictions is undoubtedly due to the fact that inequality and segregation-increasing processes are often complex, gradual and not always easy to predict. However, it is important to point out that the negative consequences affecting public schools reported by municipalities at the same time match previous related studies.

Thus, a study carried out by the National Agency for Education (Skolverket 2001b) points out that in certain municipalities, especially in the Stockholm region, the education policy applied stimulates the creation of an independent school at the expense of the closing of a public school. In this way, the possibilities of the citizens to choose between public and independent schools have been reduced. At the same time, the number of state-run schools has increased, since it is the National Agency for Education which is responsible for the supervision of independent schools in Sweden.

The National Labour Organization (Fransson & Wennemo 2003) showed a study describing the negative economic effects affecting public schools due to higher municipal expenses caused by the growing number of independent schools during the period ranging between 1995 and 2001. This study has been questioned by another research (Björklund, Edin, Fredriksson & Kreuger, 2003) that did not show a direct relation between the municipalities' cost and the increase of publicly funded independent schools. In a third study (Skolverket 2004a) considering how the opening of independent schools affects the economy of public schools, the National Agency for Education shows a relation between the quantity of pupils in the independent schools and the average cost per pupil in the municipality. This study confirms that municipalities having the highest cost per pupil also are those with a higher quantity of pupils in independent schools. However, this result is not the same in the entire country. In the larger

cities – Stockholm, Gothenburg and Malmö – the negative effects on the municipality's economy are obvious due to the high quantity of pupils attending independent schools. However, in other, smaller municipalities, the existence of publicly funded independent schools brings about a reduction on municipal costs per pupil.

Although the negative effects at a national level are not clear, it is evident that the increase in the quantity of independent schools runs parallel with the reduction in the quantity of public schools.⁵

This study from the National Agency for Education confirms the prediction made about municipalities included in our study and we could thus wonder if we are not faced with a gradual disappearance of the public Swedish school as a long term effect of the increase of independent schools subsidized with municipal resources.

Fundamentalism as a Consequence of Diversity?

Other arguments presented by municipalities against the opening of independent schools are the risk of cultural segregation and the fear of independent schools as un-democratic organisations. These arguments point out the threat to democracy posed by fundamentalist schools and emphasize the problem of putting cultural justice into practice.

In the statements of the municipalities of Örebro and Nybro, the segregation risk is considered as a possible consequence of the opening of religious independent schools. The cases are: a Muslim school (Örebro) and a Christian school (Nybro) that, according to the municipalities, will only be open for pupils of those religions. We can see here that the opening of religious “strong subaltern counter publics” is considered as a segregation instrument by these municipalities.

⁵ Statistics from the National Agency for Education (Skolverket 2003b) show that in 2002, the number of independent primary schools increased by 53 schools in comparison with the number of primary public schools that was brought down to 20 schools. Likewise, the quantity of pupils having attended independent schools reached 5.5% during the 2002–03 school year, compared with 2.7% during 1997–98. The quantity of publicly funded independent schools increased from 106 schools in 1991–92 to 528 schools in 2002–03 (Skolverket 2003b)

A third interesting case is the Municipality of Landskrona that opposes to the opening of an independent school, which includes in its syllabus an overnight out-of-home program for all the students. According to the municipality, this kind of activity would not permit the admission of girls whose religious traditions do not allow them to sleep out of their homes. In this way, this independent school would not meet the legal requirement of free admittance for everybody without exceptions.

However, in the material studied, the existence of possible fundamentalist schools or the increase of ethnical, religious or sex segregation are rejected by the National Agency for Education as valid reasons to deny the opening of independent schools. However, the risk of opening fundamentalist schools has been largely debated both in research studies (Englund 1995; Gerle 1997) as in the mass-media.

In the Spring of 2004, a Swedish TV show from a state-owned TV station showed an interview using a hidden-camera at several Muslim religious schools. In this programme it was possible to detect several irregularities related to the way in which some of those schools worked. For example the fact that among them corporal punishment was accepted and that values contrary to the basic values of Swedish schools were taught.

On account of the impact of this TV programme, the National Agency for Education carried out several inspections in those schools. Among them, an inspection was carried out on 25 religious independent schools (Christian, Jewish and Muslim schools). These schools were chosen because they had been in the TV programme or because they had not been subject to any inspection from the authorities for a long time or because they had never been inspected. However, in the results of this inspection (Skolverket 2004b) it was not possible to find any evidence that these schools were carrying out an educational activity contrary to the goals and values of the Swedish school system. These schools also met the demands of neutrality and diversity in the teaching of their syllabus as stated in the national school syllabus for all types of schools. Thus, the National Agency for Education shows another reality than that obtained by a hidden

camera by a journalist of the state-owned TV station. This inspection could show that in some cases these schools had deficiencies as to the teaching quality, the control of the grading system, the standards for school facilities, the integration of pupils with special needs, the school administration and the hiring of school staff with the professional competences/qualifications stipulated by the Swedish law. Only in the case of two schools the deficiencies were so important that they could lose their licence and the municipal subsidy, if they could not solve them shortly. In the remaining cases, the deficiencies were of minor importance, and they did not risk the future of those independent schools.

However, this report outlined the risk that some of these independent schools may centralize certain functions such as owner, principal and in some cases, parents of the pupils in the same person. It was possible to verify the pressure exercised by parents for the school to carry out educational practices contrary to the values and goals of the Swedish school system. The National Agency for Education confirmed that there was a risk that the principals or headmasters of those schools, especially of smaller schools, were obliged to accept those demands imposed by parents, in order to sep the number of students enrolled.

Conclusion

The result presented in this study shows that different conceptions of justice, equivalence and equity are present in the practices of the different actors involved in the process of opening an independent school.

Thus, the opening of independent schools can be seen as an example of diversity and the promotion of *strong subaltern counter publics* that would assure the reconciliation of distributive and cultural justice. This view is present mainly in the legal framework of the Swedish education system, the practices of the National Agency for

Education and the legal forms filed by the same independent schools to obtain their permit.

On the contrary, the growth of independent schools can also be seen as the gradual disappearance of public schools as a common sphere to all citizens. By closing or reducing common public spaces, there is a risk for higher segregation and inequality. These multiple spheres would have negative consequences on distributive justice, which is the main component both of equivalence and equity. This position is mainly represented by the activity of municipalities described in the official records I studied.

Thus, it is possible to state once more that the evaluation of the effectiveness of opening new schools will depend on the idea of justice from which such evaluation will be based upon. By focusing on distributive justice, the opening of independent schools at the expense of the impoverishment, or even the closing of public schools, can be questioned as an effective tool to promote social justice. On the other hand, based on the idea of cultural justice, and at the same time assuring similar economic possibilities for all pupils so they can choose either an independent or public school, the opening of independent schools can be considered effective.

Although the evaluation of each of the processes will depend on the concept from which such evaluation is based upon, the fact that the prevailing role of public schools as a unique sphere within the education system is declining, cannot be denied. There are multiple alternative education spheres that even when they are financed and regulated by the national government, they risk the unique role of public schools in the public sector. Although the National Agency for Education and the Courts persistently reject or disregard the negative long-term consequences on public schools posed by the opening of independent schools, the fact that Sweden is currently undergoing an increasing reduction of the number of public schools due to the increase of independent schools is not surprising. That the same figures showed by the National Agency for Education are those confirming the negative long-term consequences pointed out by the

municipalities in their statements against independent school is a fact interesting to observe.

Among these multiple independent schools, the existence of independent schools with a dubious ideology poses a very serious threat. For children attending this kind of schools, all possibilities of equitable education disappear. In this case, it is the National Agency for Education's main responsibility to control and verify that this does not happen, by questioning whether schools under the direction of organizations with an ideology contrary to the Swedish school values, can provide a democratic and egalitarian education to all of its pupils. Although such schools state in their syllabus that they meet the requirements of the Swedish school system, in practice there is nothing that could guarantee that. Perhaps, the National Agency for Education should doubt whether any organization, whichever its religious orientation or ideology, can really provide a pluralistic or democratic education as provided by the Swedish school system, when their objectives and values are antidemocratic.

The role of the National Agency for Education must however adapt to the legal neo-liberal framework imposed by the 1990s reform. The responsibility of the National Agency for Education is to act within the possibilities stated by law. In this case it is important to take into account the role of legislation, which establishes the multiplicity of educational spheres as a tool to promote equivalence and equity. In this legal framework, the right to equivalence is defined as compatible with educational diversity, while at the same time the practical problems of such compatibility are not questioned.

Today Sweden faces the consequences of the increased number of independent schools and the existence of some fundamentalist-oriented independent schools at the expense of a decreasing number of public schools. This is a fact, regardless of the justice concept from which these processes may be based upon. Taking such consequences into consideration, we should not ignore the facts but rather face them in order to find a solution.

This article should be considered an update for the redistribution-recognition dilemma present in the concepts of equivalence, equity

and social justice. It is necessary to analyse this dilemma in order to become aware of how much we are ready to lose the right to equality in order to obtain an increase in educational diversity. Do we really wish to go as far as to accept a gradual disappearance of public schools or to run the risk of accepting fundamentalist ideologies in order to preserve multiple public spheres?

Finally, in order to reach a better understanding of this dilemma, I wish to point out the importance of constantly questioning the contexts and limitations within which the education system is capable of reconciling social and individual differences with the demand of a basic equality for all citizens.

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EQUIVALENCE AND THE CHALLENGE OF 'FREEDOM OF CHOICE' – CONSEQUENCES OF A CHANGED POLICY ON A DEMOCRATIC CITIZENSHIP IN SWEDEN

ABSTRACT

Equivalence is regarded as a central concept in contemporary Swedish education policy. One important aspect in the education policy is to describe and determine the Swedish schools' assignment to bring up democratic citizens. The concept of equivalence, hence, plays an important role in this policy-making practice. In the 1990s equivalence is challenged by another concept: 'freedom of choice'. Here some possible outcomes of a changed conceptual framework in the education policy are tried out, regarding the political understanding of a democratic citizenship. Three questions are pulled forth in order to carry out this aim. The challenge of 'freedom of choice' on equivalence contributes to a change in the political understanding of a democratic citizenship in Swedish education policy. A phenomenon that occurs in at least three aspects: the political participation (from co-acting to re-acting), the political activity (from directing to voting) and the political role of the citizen in society (from being a designer to a consumer).

Introduction

Equivalence is a central concept in contemporary policymaking of education in Sweden. As a policy practice¹ it can be described as rhetorical processes of political consensus making in order to produce national guidelines for education. The central role of equivalence for the outlining of public education in Sweden has historical connotations. Deriving from the concept of equivalence – another fundamental concept in the Swedish educational history of the 20th century – equality is related to different political ambitions of out-levelling social and economical differences between social classes in Sweden during the 20th century (Lindensjö & Lundgren 2002). Some of the most frequent historical ambitions related to equality in educational matters have been equal access and right for all individuals to education, equal multitude of knowledge and values for all in school, equal basic conditions and equal content for all in school, equal school teaching for all and equal length of education for all (Lindensjö & Lundgren 2002). The historically strong Swedish tradition of a homogeneous public and compulsory school system during the 20th century, along with the Governmental Commission of the school's upbringing of democratic citizens since the World War II, has made these meanings and ambitions of equality possible on a political cultural basis.

In the early 1980s the concept of equality is replaced by that of equivalence in the policymaking of education. This linguistic event can be regarded as part of the left wing's way to meet up with the right-wing's reinforced critique of the Swedish school system as too uniform (Lindensjö & Lundgren 2002). Today the concept of equivalence has replaced the concept of equality in Swedish education policy practice. During the last twenty years equivalence has been used in Swedish education policy, its meaning has been object for various changes,

¹ 'Policy' is by no means limited to a rhetorical level of the political practices, as has been discussed and well developed by Francia (1999). But for the aim of this text, I use the concept of policy primarily in relation to the rhetorical level of educational policymaking in Sweden.

depending on what ideological voices and groups having governed the political arena. The different uses of the concept of equivalence can thus be seen as outcomes of ongoing ideological and political struggles. During the 1990s one of the objectives for these struggles, commissioned by Swedish Government and Swedish law (Lp094; SFS 1985:1100), is the upbringing of democratic citizens in the compulsory school. The more specific issue in this struggle has been to settle the meaning of equivalence, as this objective deals with the intimate and delicate relation between equivalence and democracy. As an outcome of this struggle the way of using and understanding the concept of equivalence is object for dramatic shifts during the 1990s in education policy practice? These shifts can be understood in relation to the expansion of another concept in policy practice, 'freedom of choice'. One way to describe this process is to say that equivalence becomes 'colonised' by freedom of choice.

The colonisation of freedom of choice, together with the intimate relation between the concept of equivalence and the understanding of a democratic citizenship in education policy matters, bring on the aim of this article. I intend to investigate a changed use of the concept of equivalence in the Swedish education policy in order to try out some possible outcomes of this change regarding the upbringing of democratic citizens in Swedish schools.

The Challenge of 'Freedom of Choice'

When equivalence enters the political rhetoric in the late 1970s its heritage from the concept of equality is obvious. Equivalence becomes thus a matter of giving equal opportunities to everyone regarding their future possibilities to choose a job, but also regarding the opportunities to enrol in and succeed in higher education and the possibilities of societal and political participation. In other words, equivalence becomes a question of offering a homogeneous content for all individuals in all compulsory schools in Sweden, in order to supply for a common frame of references concerning the meanings

and values of a democratic society (Englund 1999). Hence in the late 1970s and early 1980s this common value- and knowledge base, that is to be supplied for in all schools, is related to the school's assignment to bring up democratic citizens (Englund 1999). It is a consequence also related to the political understanding of a democratic citizenship. A central task according to this political vision is more precisely to look to everyone's opportunity to participate economically, politically and culturally in society.

During the 1980s this policy use and understanding of equivalence is challenged by another concept in education policy practice: freedom of choice. This challenge alters the focus and the meaning of equivalence. Until now freedom of choice has been incompatible with equivalence in policy matters, even regarded as opposed to it. But in the 1980s serious attempts from the right wing are made to intertwine them (Hwang 2002). And in the early 1990s, when the right wing is in governing position (1991–1994), the relation is established in the Swedish educational agenda;

An important dimension of the school's equivalence must also be to create conditions for equivalent rules of the game between different communal schools as well as between communal and independent [private] schools and to create better opportunities to choose among schools. (Government bill of the conservative party [m] 1992/93:230, 27 [my translation].)

In this quotation the concept of freedom of choice seems to be compatible with equivalence. The conceptual relation between the two in the text is established by the right wing's focus on equivalence in relation to *schools* instead of individuals, as was the case earlier. This change of focus might be understood in relation to an ongoing decentralization of the Swedish school system, carried out in the early 1990s (Francia 1999; Wahlström 2002). Nevertheless, the Social democrats show to be reluctant to the settled relation between the two concepts:

With the right-wing groups, competition between schools has been put before collaboration between schools. [– –] There is a risk that the children with the greatest needs will be losers if competition and wretchedness of schools is superior to the objective of an equivalent school. (Parliamentary bill of the Social democrats [s] 1993/94:Ub86 [my translation].)

This statement expresses a view where equivalence might be threatened by young peoples' freedom to choose school, as this is considered to generate such kinds of competition between schools that leads to negative consequences for the children with the greatest needs. Even the Social democrats now tend to focus on equivalence in relation to schools rather than to individuals, which opens up for the possibility to relate equivalence to the concept of freedom of choice. Later on in the 1990s this relation between the two concepts is accepted among almost all political parties in Swedish education policy (Englund 1999; Hwang 2002; Lindensjö & Lundgren 2002). Freedom of choice becomes used and incorporated in the understanding of equivalence, not only among the right wing scope of the policymaking of education but in the whole spectra of political actors in the Swedish education policy practice. This leads to a radically displaced meaning of equivalence, which may be illustrated in a Government bill of the Social democrats from 1996, now having returned to governing position:

To guarantee the pupils right to an equivalent education of high quality all schools shall, no matter what head of responsibility, have comparable economic conditions. Every school shall have resources with respect to the pupils needs. Equivalent economical conditions between communal and independent [private] schools is a condition for a real freedom of choice, even for pupils from economically delicate groups or in need of special support. (Government bill of the Social democrats 1995/96:200, 29 [my translation].)

The advances of the concept of freedom of choice on equivalence in education policy are made possible not only by an increased political emphasis on schools instead of individuals, as earlier. But also by an increased stress upon *formal* aspects of the educational sphere, such as economical, legal and structural matters (Wahlström 2002). Nevertheless, the political promoters of the freedom of choice approach on equivalence in the 1980s, have to deal with the historical fact that the individual's freedom to choose among different courses and subjects *in* school, as well as her or his choice *between* schools, doesn't match the historically established equalizing ideal of out-levelling socio-economic backgrounds. But the deepened integration process between the two concepts, made possible by highlighting some aspects of the matters and reducing others, brings on another agenda for the central principle of equivalence. An agenda where the former socio-political aims are transformed into aims that go with the stressed value of the individual's right to choose. An early example of this transformation process is the conservative party's emphasis upon the right of the individual to an 'optimal development' (Parliamentary bill of the conservative party [m], 1987/88: Ub806, 10 [my translation]), and the obligation of the schools to focus upon this issue. This argument contributes to the repression of another formerly central right of the individual. A right to achieve the same *result* in any school regarding knowledge and values, regardless of socio-economic background and individual qualities.

The displacement of equivalence can be related to a central event in Swedish educational politics of the 1990s: the decentralisation of the Swedish school system and the existence and expansion of private schools within it.² Increased attention is now given to the individual

² Within the Swedish school system there are two different kinds of schools, communal and private ('fristående') schools. These two are both financed by public means, but have different forms of initiating forces: the private schools are run on the initiative of private actors and the communal schools are run by communal actors. When it comes to the terminology of referring to the private schools different terms have been used in the educational policy practice; i.e. 'free-standing' ('fristående') schools, 'independent

and her or his right to choose, as this becomes a crucial aspect for the advocates of private school expansion.³ In this policy-making context the former use and understanding of equivalence, addressing itself more clearly to matters of equalized multitudes of knowledge, values and skills between individuals through school, is being subordinated.

However, freedom of choice is by no means a “new” political idea in Sweden in the 1980s. Its history can be traced back to liberal arguments in education policy of the 19th century, run by political actors of the right wing’s liberal-conservative groups. In this historical context the principle of freedom of choice has served as a core objection to the Social democratic politics. What characterizes the 1980s is that the very *concept* of ‘freedom of choice’ is given a strengthened position in educational matters. This takes place in the stigmatised debate concerning the control and financing of the Swedish school system (Lindensjö & Lundgren 2002; Wahlström 2002). The strengthened position of the concept in the 1980s is further considered as part of a more general change in the political culture of Sweden, a change where a more neo-liberal oriented political course/discourse is taken (Boréus 1994).

schools’, ‘private schools’ and ‘free-schools’. The Ministry of Education, Research and Culture do use both ‘private schools’ and ‘independent schools’ in their vocabulary in order to refer to the Swedish term ‘fristående’ (private) schools. For the purpose of this text I call these schools ‘private schools’, as this term seems to serve the purpose of clarifying the use of the concept of equivalence as an ideological one. This struggle can be understood in the light of an ongoing struggle between different voices of defining education as a public and social matter or as a project of the private and civil sphere. For further reading, see Englund 1995.

³ The increased focus on individual rights during the 1980s and 1990s in the educational politics highlights the question of *whose* rights that comes into focus. This is by no means clear in the Swedish educational debate. Supposedly it might be understood as a matter of the young *individual’s* rights to choose between subjects and courses in school, as well as between different schools. But the question that can be pulled forth is whether this right in reality turns out to be the *parent’s* right to choose school content and school (for their children). For further reading on these matters, I refer to Englund 1993.

To conclude, the altered political understanding of equivalence in Swedish education policy of the 1990s is illustrated in terms of a major displacement. Equivalence moves *from* being understood as equal access to education for all, independently of where they live, as well as equal right and possibility for all to a common base of knowledge, skills and values in school. *To* being given a multitude of different understandings related to the concept of freedom of choice. Some of the mayor traits in the altered use and understanding of equivalence are; equal access to education for all, independently of where they live and what kind of school they are attending (communal or private). And equal right and possibility for all to make different choices regarding the school content (i.e. the individual's right to choose between subjects and courses in school).

In the 1990s the concept of freedom of choice is not only compatible with that of equivalence. It is also a vital part of the understanding of it. Returning to the aim of this text: to investigate the relation between equivalence and the political understanding of a democratic citizenship, does the altered horizon of equivalence promote any changes? Some possible directions are here articulated. First, I aim to clarify that the uses of equivalence in the Swedish education policy-making are several. These multiple uses in the 1990s cannot be reduced into one single formula of some prevalent or hegemonic meaning of equivalence, as is claimed to be the case earlier on in the Swedish education policy. For the purpose of this text I will illustrate this general displacement of equivalence in terms of a broad-spectrum tendency, where the concept of freedom of choice plays a crucial role.

Equivalence displaced – Outcomes for the Understanding of a Democratic Citizenship

The 'freedom of choice' challenge on equivalence not only contributes to an altered understanding of the concept of equivalence. As equivalence is deeply intertwined with the assignment of Swedish schools to bring up democratic citizens, it also contributes to an

altered understanding of this assignment. First, I illustrate the displaced understanding of equivalence in terms of individual rights. After that, I turn to try out some implications of this alteration in terms of a changed political understanding of a democratic citizenship in Sweden.

In terms of individual rights, the former meaning of equivalence can be articulated as: *the right and possibility for everyone to be different, and to have equal value- and knowledge conditions in school for a private and a common future in society*. In terms of the new direction of meaning of 'equivalence of choice', equivalence can be articulated as: *the right and possibility for everyone to be different, and to be able to choose between different alternatives among values and knowledge in school for a private future in society*.

In a brief comparison, the former meaning tends to focus on the individual *and* the common future of the citizens, while the meaning of equivalence of choice tends to highlight the future of the individual citizen in society (i.e. each individual as member of society, and her or his relation to the private future). Another way to describe this delicate difference between the two meanings is to consider them as departing from different rationalities. The former meaning of equivalence seems to depart from *difference* and *participation* as coexisting value-conditions for the schools' upbringing of democratic citizens for the future. While the latter meaning departs from difference, or even more specifically from *differentiation*, as a value and condition for these matters. The meaning of 'equivalence of choice' not only seems to be a question of providing and encouraging individual differences, but also of maximizing them by a widened and no-limited scope of alternatives for the individual to choose between *in* school as well as *between* schools. The two rationalities may direct the objectives of the education policy in different ways when it comes to the schools' upbringing assignment. And further, for the very understanding of a democratic citizenship on the political arena in Sweden. The question of interest is in what substantial ways.

In order to outline possible outcomes of the two different meanings regarding the understanding of a democratic citizenship, I will

depart from some specific aspects of the political understanding of a democratic citizenship: the citizens' political participation. Three questions will be posed: What democratic 'objective' for political participation can be derived from the two meanings? What kind of citizen activity in the political system is possible to outline from these meanings? And finally, what role in the society is the citizen offered within these meanings?

The Citizen's Political Participation: from Co-acting to Re-acting

If we focus on the first question, the democratic 'objective' for political participation, one central aim in relation to the latter meaning of equivalence (equivalence of choice) is to supply for the individual's possibility and capability to choose. A central democratic objective for political participation may thus be described as each citizen's ability to choose. More specifically it becomes a question for the citizen to choose between different political alternatives offered. The democratic vision might be defined as the citizen's choice of the political alternative that seems most appropriate for her. That means the alternative considered the most proper for her or his private life project. Such a democratic objective for political participation can be described in terms of the democratic citizen's response to different political alternatives offered to her in a specific political context. And her or his response is considered as a choice made in immediate relation to her individual life plans. Such a democratic objective for political participation can be summarized in terms of the citizen's reaction upon different alternatives done in relation to her individual life sphere.

Turning to the former meaning of equivalence, the democratic 'objective' of participation can rather be outlined in terms of the citizen's *co-action*. The school's role in the upbringing of democratic citizens becomes a question of supplying for each individual's possibility and capability of a political consciousness, and of using it

for private *and* common decision-making. The democratic objective of this decision-making in the former meaning of equivalence is two folded. Like in the 'equivalence of choice', the individual decides what political alternative that best fits into her or his own life project. But this is made through consensus-making processes, meaning processes where each citizen is part of a collective decision-making by critically deliberating on what values and norms that can be accepted by all individuals in the society. This collective choosing and decision-making processes upon different political alternatives is part of a co-acting process as the individual's choices for the most important political alternatives for herself *and* for all are made together with others. The former meaning of equivalence thus holds a double democratic objective which is not to be understood as contradictive; the optimisation of the best political alternative for the single individual, the self-fulfilment, is considered as made through a collective will, where the best for all is related to the best for the individual.

One possible outcome of the altered use and understanding of equivalence regarding the democratic 'objective' of the citizen's political participation thus seems to be a 'narrowed' scope of interest of the citizen. The narrowed scope (of the citizen's political participation) can be described in terms of a specific transformation in the democratic citizen's activity. In the former meaning of equivalence, she or he made political choices by co-acting. In the prevalent meaning of equivalence (equivalence of choice), this political choice-making is exclusively made in relation to her own private life plans and project. The transformed choice making of the individual citizen can be described as a kind of re-action; it seems to take place in relation to already set political alternatives, presented by representatives of the different political parties. As there is no collective basis for the individual citizen's deliberation with others about what political alternatives there are, which of them is valid for all in society etc, she or he is immediately related to some kind of formal political arena, where fixed alternatives are offered to her to choose between, alternatives that she or he is to react upon in terms of

a 'yes' and 'no' and not, as in the former case, to create and deliberate upon.

To conclude, the objective for the democratic citizen seems to be displaced. In the former meaning equivalence was settled in terms of a co-acting process, where the citizen's political participation and decision-making was made in relation to her own life project and to the project of other citizens. In the prevalent understanding of 'equivalence of choice', the democratic objective is settled in terms of a re-acting process. Here the political participation and decision-making of the citizen consists of a decision-making of the citizen in terms of a choice-taking between different already outlined alternatives presented to her/him from some formal political arena on a national, regional or local level of society.

The Citizen's Political Activity: from Directing to Voting?

Focusing on the activity of the democratic citizen in the political system, the two meanings of equivalence tend to open up for some substantial differences. Beginning with the latter and prevalent meaning of equivalence (equivalence of choice) one of the skills required for a life as a democratic citizen is the capability of each individual to make rational choices. This skill can be considered as a core objective for the schools' role in the upbringing of politically active citizens in this meaning of equivalence. Such a political striving: to open up for "everyone's opportunity to optimal development" (Parliamentary bill of the conservative party [m], 1987/88: Ub806, 10 [my translation]), embeds the values of flexibility and strategic rationality, as can be seen as a way to make the citizen a competent active individual in society. These embedded values can be related to the principles of difference and differentiation, mentioned above as central in the meaning of 'equivalence of choice' and its relation to democracy. In terms of individual rights and activity this meaning

seems to stress the right for each citizen to develop her or his skills in order to improve the private life chances.

Regarding the citizen's political activities in relation to the meaning of 'equivalence of choice', these may be described as the right and the possibility to choose strategically among different political positions, presented by the political parties on the formal political arenas (local, regional or national). As mentioned above, in relation to the previous question of democratic 'objectives', the one of 'equivalence of choice' is to choose the political alternative that seems to be the most adequate for the private life project. Hence, the political activity of the democratic citizen can be defined as a question of *using* her or his democratic skills – i.e. to use her democratic competence of making proper rational choices in relation to the private life plans – by *voting* in elections of different levels. This activity requires a political consciousness; an awareness of the political system as such and the critical ability to vote for the best political answers to factual matters, in order to provide for the best argument to win. (The best political answers and arguments may here be understood as the arguments and answers that most properly fit into the citizen's private interest and life project). So far the meaning of 'equivalence of choice' does not differ from the former meaning of equivalence. But the differences appear in a deeper look at the possible purposes of the consciousness of the citizen, in her or his voting activities within the political system. When it comes to the meaning of equivalence of choice, the political activity is directed solely towards an individual level and not towards a collective level. The purpose of the citizen's political activity is to gain an expanded space for individual action in society. In the former meaning, the citizen's political activity includes this purpose, but goes beyond it, as it is related to a societal level, where transformation processes of the politics in the society are included in the purpose of the citizen as a political agent.

Turning to a deeper consideration of the former meaning of equivalence, a critical consciousness of the individual on what political argument that are brought up on the political agenda is required, as this meaning also opens up for an understanding of the citizen's

activity when voting in political elections. Interestingly enough, thus, the two meanings of equivalence do not differ in this respect as they tend to stress the political activity of the democratic citizen in terms of the necessity of the individual to gain skills and knowledge for taking part in the societal future. But the former meaning seems to require something more. It requires a political, ethical and critical awareness of *who* brings up the alternatives on the political agenda, and *why* this is being done. These requirements can be derived from the condition that the former meaning embraces a familiarity with democratic procedures and processes, not only in order to the citizen to be able to understand them for a proper and decent voting procedure, but also for her or him to be disposed to participate in such processes in order to *direct* the political system in ways that correspond to the collective will (the public opinion) of the people.

Along with these aspects of the former meaning of equivalence regarding the citizen's political activity the role of the schools differ from the meaning of equivalence of choice. The former meaning considers public opinion and collective decision-making, in order to mobilize the will of the individual and the collective for the directing of the political system, as fundamental for the citizen's political activity in the system as her/his voting in this system. The rationality of the former meaning of equivalence brings on different basic values than the 'equivalence of choice'. Such basic values are tolerance and respect for differences between individuals and acceptance of good (reasonable) arguments for embracing such opinions and values.

To conclude, the two meanings of equivalence have some similarities when it comes to the question of the political activity of the citizens: they focus upon the necessity of a political consciousness of the citizen. But the motivating forces of this consciousness appear to be different, on an individual as well as on a systemic and societal level. While the highlighted aspects of the former meaning stress the critical consciousness of the citizen as directed towards an individual *and* a common future, the 'equivalence of choice' meaning stresses this consciousness exclusively towards an individual future. According to the meaning of equivalence of choice, thus, the political activities of

the citizen in the political system tend to be a question of voting for set political alternatives of concern for the individual in her or his life project. In the former meaning of equivalence the activity of the citizen is a question of voting. In addition (to the citizen's voting) another political activity appears to be central in this meaning, which can be referred to as collective formation processes of political alternatives to be presented by the representatives of the political parties of the political system (the citizens). One possible implication of the altered use and understanding of equivalence in Swedish education policy in the 1990s thus seems to be an exclusion of a more pro-active political citizenship, where the politics of the society are outlined by different kinds of public will-making. The political activities of the citizen in the political system head towards a more individualized focus on formal voting procedures in relation to the private strategic choice of the citizen.

The Citizen's Political Role in Society – From Designer to Consumer?

The political role of the citizen in a democratic society can be considered as a concluding mark of the two former questions. This question rather aims to define and develop a broader comparative picture of the possible outcomes of the displacement of the concept of equivalence in the /in Swedish education policy.

According to the former meaning of equivalence, the political role of the citizen is to be a *designer* of the political system, by co-acting together with other citizens in order to take part in the decision-making. This task not only implies a decision-making about what alternatives for the citizens to vote for, but also a collective decision-making about what factual matters and ideological objectives that are of importance to bring up and treat in the public political debate, and the motives for these objectives. This aspect appears to be absent in the latter meaning of equivalence of choice. Even though voting on factual matters of interest for the individual can be considered

as a way of designing the political system, it is hard to consider the initiative of the individual citizen as part of a directing act, as the political decision-taking horizon of the individual ends at her or his private sphere.

One way to resume the different outcomes of the two meanings of equivalence in terms of the understanding of a democratic citizenship in Swedish education policy is to say that the former meaning stresses the citizen's role as a *designer* of a democracy and of societal welfare, but also a user of citizen rights offered by the political system in which she is included. While the meaning, of 'equivalence of choice' tends to stress the citizen solely as a user or *consumer* of the democratic rights of this political system, offered by a pre-defined political agenda and welfare system of society. The former meaning opens up for an understanding of the role of the citizen as a user or consumer of her democratic rights. But simultaneously defines this activity within the collective setting of the society, where the constituting and directing of norms and democratic conditions in the society is included as part of this activity. Another way of putting it is to say that the political activity of the citizen according to the former meaning of equivalence is situated equally among the communication and deliberating processes of the citizens, and within the established political system in society, while the political activity in the equivalence of choice is situated exclusively in the relation between the individual and the *political system*, consisting of the pre-existing party politics of the society. Yet another way to define the differences between the two meanings in relation to the understanding of a democratic citizenship in Swedish education policy is to say that the political role of the citizen in a democratic society is altered. It no longer includes taking action in political constituting forces of the society, through collective will-making processes. Instead it scopes questions related to the different kinds of reactions on matters brought up by the pre-existing political constitution of society.

To conclude this discussion on the use of the concept of equivalence in the Swedish educational policy practice, is it possible to say that the policy used in relation to the central concept of equivalence in Swedish

education policy *do* bring about some deep-seated consequences for the political understanding of a democratic citizenship. Before making concluding remarks of this text, I turn to a brief touchdown on the use of the concept of equivalence in contemporary policy making in Sweden. Aiming to see whether the ‘freedom of choice’ challenge on equivalence is related to the political understanding of the role of the democratic citizen in society in the beginning of the twenty-first century.

Equivalence Reformulated: Outcomes for the Democratic Citizenship in Sweden?

In a recently submitted report of the Commission of Responsibility (Ansvarskommittén), given the task to investigate the capacity of the organisation of the Swedish society to handle future demands, the ‘freedom of choice’ challenge on equivalence is being manifested;

Democracy and welfare matters are intimately related. The structure of the public activities has a great impact on the possibility of people’s insight and general view and thus for their possibility to democratic participation. The core of the public undertaking is to give all citizens an equivalent service and an equivalent treatment. (Swedish Government official Report [SOU] 2003:123, 24 [my translation].)

In the quotation the relationship between equivalence and democracy is confirmed. Equivalence is considered as a measurement in the democratic obligation to offer equal service and treatment to all citizens. The main undertaking for the public institutions is to offer such treatment, which includes offering a decent transparency for all citizens regarding the public undertakings. A responsibility that does not exclude her or his individual rights as a member of a democratic society.

In this context equivalence is used in relation to the societal and bureaucratic undertaking, rather than as a measurement of the

citizen's possibilities of taking active part in the outlining and defining of these societal and bureaucratic political undertakings. Such a use and focus on equivalence and on democracy is compatible with an understanding of a democratic citizenship in terms of consumer's right to welfare services offered by the public institutions, which is a view that matches the meaning of 'equivalence of choice'. But the use of equivalence in the quotation (SOU 2003:123, 24) also suggests an understanding of the role of the citizen as participating in different kinds of collective and communicative processes, in order to deliberate collectively on the different needs, demands and wills of the citizens regarding public service. This way of understanding the quotation corresponds to the former meaning of equivalence.

Another way to interpret the concept of equivalence in the quotation (SOU 2003:123, 24) is to consider that the citizen's political participation depends on the capability of the political and public arena to offer clearly differentiated alternatives. This means understand the citizen's political role as having the capacity and motivation to take part of debates in terms of collective decision-making, and accordingly corresponds to the former meaning of equivalence. This specific understanding of equivalence in the quotation is not ironed out in the quotation, but neither opened up for as the responsibilities, described as offers of the public sphere to the citizens. The stressed aspect here seems to be the assignment of the political arena *towards* its members: to function as assisting service centres when offering welfare services.

Even though the use of the terms 'public activities' and 'public undertaking' in the quotation (SOU 2003:123, 24) is compatible with both meanings of equivalence, it most likely contributes to the reinforcement of the meaning of 'equivalence of choice'. This in turn, highlights the displacement of equivalence that takes place during the 1990s in Swedish policy-making. Contemporary uses of the concept of equivalence in Swedish policy rhetoric are ambiguous, and they open for a multitude of different political understandings of democracy and of a democratic citizenship. The rich spectra of possible understandings pulls forth the necessity of investigating

the uses of the concept of equivalence, not only in education policy making, but also in other policy contexts in Sweden.

Concluding Remarks

According to the aim and investigation in this text the colonisation of freedom of choice on the concept of equivalence can be considered as vast when it comes to the political understanding of a democratic citizenship.

The displacement of the concept of equivalence during the 1980s and 1990s is reflected in the production of future political packages of measures for education in Sweden. As (political) language use is a powerful force for the understanding and for the constitution of reality (Boréus 1994; Englund 1999), the changed use of the concept of equivalence in Swedish education policy brings on changes for the understanding of the commissioned upbringing of democratic citizens in Swedish schools. But also for the political understanding of a democratic citizenship as such. The three questions pulled forth in this text, aiming to investigate possible consequences of a changed conceptual framework of equivalence regarding the political understanding of a democratic citizenship in Swedish education policy, may serve as analytical toolbars. Not only in order to investigate the commissioned upbringing of democratic citizens in Swedish schools, but also for future policy-making in Sweden.

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