



Education International
Research Institute



Equity Matters



Report by

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This study was commissioned by the EI Research Institute.

The EI Research Institute was established to develop the research capacity of Education International and its affiliated member organisations. It aims to conduct independent research and also to collect and disseminate information on studies relevant to education unions.

The EI Research Institute believes quality research can make an important contribution to the attainment of trade union, professional and social goals.

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FOREWORD

That equity matters for children, teachers and societies is indisputable. Equity is a fundamental value of public education systems, which goes beyond narrow considerations of effectiveness and efficiency. It is also a powerful policy tool in the development of quality in education.

Research-based evidence increasingly shows that equity is an intrinsic part of quality in education and a key factor in achieving it. Equal access for all children to quality teachers, schools, and teaching materials and facilities enhances the overall learning outcomes for those children, and their well-being and social development, and reinforces the quality of the education experience.

The economic crisis has resulted in numerous equity programmes and targeted policies being removed from education systems as a result of economic austerity measures. As the major 'cost' of educational delivery, teachers themselves become the focus of attention when economic 'rationalisation policies' are brought into play in relation to education provision. Often this results in a trade-off between equity and quality in education resourcing and national financial priorities. This is a false dichotomy however, as these are not adversarial goals, but should be complimentary. Quality education for all is fundamental to economic development.

Education International is strongly committed to equity as an underlying principle of all education policies, and recognises the importance of equity for quality public education.

The purpose of this study, commissioned to a team of researchers, led by Dr. Elizabeth Wood, at the University of Exeter, by the EI Research Institute, is to find new evidence about the importance of equity in education. It explores and analyses how teacher unions understand and use equity concepts in their policies and advocacy to advance the aim of quality education for all. The study is based on an extensive literature review, an EI membership survey and a set of country case studies.

The report highlights that teacher unions are committed to pursuing and achieving equity targets in education. Unions consider equity an integral feature of an inclusive education system that offers opportunities of access and participation for all children, their parents and the broader society.

6 The unions' responses have illustrated their focus on human and children's rights as the basis for aspiring to and achieving greater equity and quality in their education

systems. The pursuit of unions' goals and policies in education is an effective means of leveraging change, but there have to be pragmatic adjustments between trading-up and trading-off equity issues. Trade-offs may occur across all areas of the education system. Dynamic and shifting social, political and economic agendas influence the extent to which unions can achieve holistic, rather than fragmentary, approaches.

The work of teacher unions is sometimes seen as defending the special interests of teachers. However, the scope and remit of their policies and activities, indicates shared advocacy for the interests of teachers, and of children and their parents, across all stages of education. Thus equity is a consistent value in unions' goals and policies, but at the level of society in general, these goals and policies are difficult for unions to implement and achieve. The study offers many examples of how teacher unions are actually prioritising equity and quality goals, illustrating contemporary unions' pursuit of universal equal education provision as a basic right, while at the same time targeting the specific needs of some disadvantaged groups and individuals.

We hope that this report will provide valuable and useful insights on how teacher unions in the 21st Century regard such concepts as equity, equality and quality in teachers' work, in school life and in education systems in general and how they seek to implement them.

Fred van Leeuwen
General Secretary

A handwritten signature in black ink, consisting of a vertical line on the left that curves into a horizontal line extending to the right, ending in a stylized flourish.

ACKNOWLEDGEMENTS

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AUTHOR BIOGRAPHIES

Dr Elizabeth Wood is Professor of Education at the University of Exeter, specialising in early childhood and primary education. She teaches on Primary PGCE, Masters and Doctoral programmes, and has led school-based research partnerships in the south-west of England and Wales. She convenes the Special Interest Group on Early Childhood for the British Educational Research Association, and has worked with the Department for Children, Schools and Families (England), the National Council for Curriculum and Assessment (Ireland), and the National Union of Teachers, on developing guidance on play in educational settings.

Her research interests include play within and beyond early childhood; teachers' professional knowledge and practice; curriculum, pedagogy and assessment in early childhood and primary education; equity issues, and the policy/practice interface. She has an international reputation for her research on play and pedagogy.

Dr Martin Levinson is a senior lecturer in the Graduate School of Education at Exeter University. His area of expertise concerns the education of minority / marginal groups, and his research is reported in leading international journals. His work is interdisciplinary, covering themes as diverse as identity, literacy, gender, play, and orientations towards space and time. He has a strong interest in migrant and itinerant groups, and in particular, this has involved several ethnographic projects with Roma communities.

Prior to work in Higher Education, he has worked as a secondary teacher in England, and as an advisory teacher in Denmark. He has also lived in Spain and Italy, and travelled extensively across the Far East and North America. His photographs are part of the ethnographic collection at the Royal Albert museum in Exeter.

Dr Keith Postlethwaite is Associate Professor at the Graduate School of Education at Exeter University. He researches professional learning and science education, drawing on socio-cultural theories of learning, including activity theory. He uses a range of research methodologies including action research. Recent major research projects have included 'Transforming Learning Cultures in Further Education' (funded by ESRC), and "The Thinking and Practice of Beginning Science and Mathematics Teachers" (funded by the Leverhulme Trust).

He is currently working with an international partnership investigating "Science Education for Diversity (funded by EU) and in "An Action Research Partnership to Enhance Learning in Science, Focusing on the KS2/3 Transition" (funded by Astra Zeneca Science Teaching Trust). This range of research informs (and is informed by) his teaching on doctoral methodology courses and science teacher education courses and supports his doctoral supervision.

Alison Black is a doctoral student at the Graduate School of Education at Exeter University, whose thesis explores the demographics of pupils in special schools and future models of inclusive secondary schools. She gained a Masters of Education in Special Educational Needs from Exeter in 2009. Prior to this she was a school teacher, and has worked in both primary and secondary schools, including roles as a science coordinator and a year team leader. Most recently she has worked part time as a deputy manager in an Extended Schools project offering after-hours study support to children in danger of becoming disaffected. Her research interests are school inclusion, differentiation, Special Educational Needs, future schools and the efficacy of alternative curricula. She is currently working as a research assistant for the Coalition for Education in the 21st Century.

EXECUTIVE SUMMARY

Introduction and research design

The aim of this project is to capture the nature and significance of unions' equity policies in the achievement of quality education for all in public education systems. The research was undertaken in 2010 by Dr Elizabeth Wood, Professor of Education, Dr Martin Levinson, Senior Lecturer, Dr Keith Postlethwaite, Associate Professor of Education, and Alison Black, Research Assistant.

Aims:

1. How do education unions conceptualize equity in education?
2. How are these concepts operationalised, as evidenced in unions' policies and practices?
3. What are the issues for teachers, with regards to the concepts of equity?
4. How can Education International contribute to the international debate on equity in ways that benefit members?

Research design:

1. Literature review to identify key concepts, trends and issues in research, including empirical and theoretical studies, and reports from international organizations (such as UNESCO, OECD).
2. Country-wide Lime Survey questionnaire (on-line and Word versions), resulting in quantitative and qualitative data.
3. Six country-specific case studies, using general and country-specific questions, derived from the survey.
4. Analysis and synthesis - key trends and developments, and future challenges for EI, and implications and recommendations for teachers' trade unions (policies and practice).

Issues from the review of international literature

We have used the concepts of horizontal and vertical equity Brown (2006) to understand how equity policies are defined and operationalised at country-level, and in international policy aspirations.

- Horizontal: equal treatment of those who are equal. This is a starting point and precondition that can be used to achieve equity. It is a means, not just an end.
- Vertical: unequal but equitable treatment of those who are not equal, which is designed to reduce inequality.

We have also used Milner's (2010) theory that the perceived achievement gap (across different groups of children) is an outcome of a matrix of gaps, which involves equity issues for teachers and children. These 'gaps' intersect to improve or reduce children's educational achievements and life chances.

Analysis and findings

All EI affiliated unions were sent the survey (English, French and Spanish translations), with 31 responses. From these, 6 case studies were carried out in Canada, New Zealand, Ireland, England, Poland and Zambia.

Unions' concepts, goals and policies on equity

Not all sections of the survey were completed fully by all the respondents, which resulted in incomplete or missing data. The data is therefore limited in reliability and whilst it is difficult to draw general conclusions, it does have indicative and illuminative value. Five unions had no specific equity policy formulated; of the others some had wide ranging policies that included broad principles of horizontal equity. Some had more detailed policy statements that focussed on specific areas related both to teachers and to children, and addressed vertical equity.

The goals in union policies for teachers included equity in relation to career opportunities, conditions of service and pay; for children they included equity in relation to access to education, to opportunities to achieve and to access to resources. Equity was sought across categories defined in a variety of terms including gender, sexual orientation, sexuality, LGBT persons, race, religion, ethnicity, marital status, colour, creed, ethical or religious beliefs, ability or disability, age, political opinion, employment status, family status, social class/income/rich and poor, second language learners. However, not all unions paid attention to all these categories in their policies. The goals most often omitted from union policies were 'equity for students with physical disabilities' and 'equity for students with learning disabilities'. In addition, some unions align equity goals with international policy goals such as the UN Convention for People with Disabilities, Education for All. However, there are some tensions between goals that focus on horizontal and vertical equity.

The unions' views were that similar goals were reflected in government policy. However, these government policies were often seen as "not implemented as yet" (e.g. more than 50% of respondents felt that their governments had not yet implemented their policy for equity in resource distribution or their policy for equity by social class). As is to be expected, unions engaged with governments about these issues, and some interesting mechanisms for engagement were outlined. Unions often stated that although progress was being made, that progress was slow.

Unions often saw equity issues as more complex and more targeted than is implied by discussion of general categories such as 'boys' and 'girls'. For example, it was specific groups of boys and girls (rather than boys or girls generally) who suffered the most marked inequities in terms of their school achievements, and the longer-term impacts of relatively lower outcomes.

Several unions were critical of the notion that they should list their top three priorities across this range of equity concerns because they did not feel it appropriate to prioritise some aspects of equity over others; other unions felt that priorities changed

in light of contextual circumstances such as a change of government, or the global economic downturn.

As might be expected, when discussing equity goals, unions in different countries identified different issues related to their broader cultural and economic circumstances, and educational histories. (For example, in a period of economic uncertainty in Ireland, much concern was expressed over such matters as equity in job security). However a key issue was that, in order to achieve equity, boys and girls, and other minority/disadvantaged groups within countries' populations, may need to be treated differently through the provision of specific programmes or interventions, specialist teachers or dedicated funding, which indicates support for vertical equity goals.

Although some unions saw no barriers to the achievement of equity, others identified a range of barriers such as funding, resource allocation, teacher supply and training, a euro-centric curriculum, and broader cultural issues. As well as the amounts of financial and other resource available, there were concerns about the misuse, mismanagement or misdirection of resources. Unions noted that the people particularly affected by these barriers were often children with special educational needs, the socio-economically deprived and cultural minorities.

Country-specific factors regarding equity

The case studies of six countries all indicated that although unions' goals and policies are focused mainly on equity in education, their policy remit extends to influencing related areas of social policy such as health, welfare and housing. This is because some policy goals for equity in education need many solutions, which reflects Milner's (2010) argument that equity goals for children need to be addressed across a matrix of gaps. Diversity is an umbrella term – there are diversities within diverse minority groups (such as Indigenous communities, Gypsy Roma Traveller communities, and within special educational needs and disabilities).

More attention needs to be paid to these diversities with regard to language, cultural practices and beliefs, and home and community child-rearing practices. Teachers need more culturally-situated knowledge to better respond to equity issues.

Special projects and interventions need to be sustainable in terms of funding and impact. Otherwise equity policies are more fragmentary than holistic.

Implications for Education International's goals and policies

International drivers for improving access and quality have limited impact without attention to equity for teachers and for children.

Areas of inequity are common across countries (gender, income and SES, ethnicity, indigeneity, special educational needs and disability, etc). Inequalities and social

injustices are intensified across these intersections (e.g. being poor, female, and in a rural location). One aspect of inequity (e.g. SES) needs many solutions – the equity gap is an outcome of a matrix of other gaps, which need policy solutions from different government departments such as health, welfare, and housing.

Whilst horizontal equity exists as an intrinsic value in unions' goals and policies, vertical equity is needed to address cycles of disadvantage. This is especially true for the most disadvantaged groups in society (minority groups, marginalised groups, Indigenous groups). Horizontal equity cannot be achieved as an end in itself because of shifting national and global contexts. Rather it is a means to equity goals.

More resources, but better targeted resources are needed to achieve vertical equity. However, this is an increasingly challenging aspiration in the current economic conditions and educational trends towards privatisation and/or public/private partnerships. There is a danger of fragmentary rather than holistic approaches being reinforced.

Strong equity policies do influence the overall quality of educational provision and outcomes through structural and process variables, including access and accessibility; opportunities via curriculum, pedagogical differentiation; materials and resources; high quality teacher education; outcomes for children. In countries where these conditions are provided then horizontal and vertical equity are more likely to be achieved, and are more likely to lead to positive cycles of advantage.

An alignment of horizontal and vertical equity goals and resourcing influences the quality of education. However, equity and quality may be 'traded-off' under certain circumstances. Unions' goals and policies cannot always be implemented because of mediating factors such as funding, competing priorities, national and international policy drivers.

Ongoing challenges

Current global trends are creating potential threats to equity and quality via the 'economic downturn'. These include reduced resources, privatisation, rolling back unions' achievements in existing progress in conditions of service, and in the quality of provision for specific groups of children.

How will unions respond to these global trends? The evidence suggests that some unions are defending existing policies on pay and teachers' conditions of service, rather than focusing on gaining further improvements.

How can unions (with the support of Education International) balance trading-up and trading-off equity goals? Several unions would like to make better use of international comparative data.

The evidence indicates that the most disadvantaged and most marginalised groups are also the most vulnerable to cuts in funding. How can unions influence equity and access these groups?

INTRODUCTION

The aim of this research project is to capture the focus and significance of unions' equity policies in the achievement of quality education for all in public education systems. Four key questions guided the design and aims of the study:

1. How do unions conceptualize equity in education?
2. How are these concepts operationalised, as evidenced in unions' practices and policies?
3. What are the issues for teachers, with regards to the concepts of equity?
4. How can Education International contribute to international debates on equity in ways that benefit members?

The objectives of the study are as follows:

1. To carry out a questionnaire survey of EI member organizations regarding their views and opinions of concepts of equity;
2. To carry out a number of country-specific case studies in order to identify how equity is conceptualized and implemented in unions' policies and practice.
3. To provide a focused literature review, as an overview of the key issues, and framework for the data analysis.
4. To analyse, synthesise and discuss the evidence discovered in the empirical data and literature review;
5. To identify key trends and developments, and future challenges for EI;
6. To make recommendations for future research;
7. To identify implications and recommendations for teachers' trade unions (policies and practice).

This study begins from the position that equity matters for teachers and for children, and that striving for equity is fundamental to the policy aspirations of national unions, to Education International, to governments and supra-national organizations such as

UNESCO and OECD. In the design stage, the research team (in EI and Exeter) agreed not to impose a definition of equity or equality as it was not the intention to measure or check the extent to which unions adopt EI definitions or policies. We aimed to elicit the opinions and responses of individual unions in the context of each country's trajectory of socio-economic, cultural and political development. In aiming to understand how unions operationalise their concepts of equity in their policies, there was no attempt to privilege certain aspects of equity-related policy and practice over others. The aim was to identify the main inequities in each country's education system, and to capture the *variations* within and between countries that differ in terms of their GDP, and in the context of socio-cultural-historical trajectories of development. This is a pragmatic acknowledgement that, although all aspects of equity and equality may be important, only some may be the focus of attention, or indeed a priority, at any one time, in unions' and/or governments' education policies. There are many complex factors which influence country-level policy generation and implementation, such as scarce resources, changes in the economic conditions for development and progress, or changes in governments' priorities.

The research design included a survey questionnaire to all EI member unions, followed by detailed case studies of six countries. The pilot survey took place in February-March 2010, with three unions participating. The responses informed the design of the final survey, which was sent to member unions in April-May 2010. Copies of the survey were distributed in different ways, including an on-line version, a Word version, and hard copies where these were requested by unions. The main survey was translated into French and Spanish, with responses translated back into English for the analysis and the final reports. A total of 29 countries responded to the questionnaire survey, with representation from the following regions: North America; Europe; Africa; south-east Asia and Australasia. The case study countries were the Republic of Ireland, New Zealand, Canada, UK, Zambia and Poland. There are some limitations to the data: not all unions completed all the sections in the survey questionnaire which has resulted in some missing or incomplete data.

Chapter 1 focuses on the literature review, and aims to define the concept of equity, and the factors that contribute to inequity in education. These concepts are contextualized first in relation to **Equity Matters for Children**, and second in relation to **Equity Matters for Teachers**. The discussion of the concepts of equity and quality in education draws on international research literature and reports, and indicates the challenges that are inherent in combining, balancing or trading-off these concepts in practice. This is followed by Chapter 2, which focuses on the analysis of the project data from the country-wide survey questionnaire. Chapter 3 presents the country-specific case studies, with a commentary on the issues raised. The fourth and final chapter synthesizes the main findings and key themes arising from the literature review and data analyses, and identifies possible pathways of development and influence for Education International.

Chapter I : Literature Review

The aim of this literature review is to explore the concepts of equity and equality and their relationship to achieving quality in public education systems. The intention is to analyse the different influences that are impacting on equity issues from international, intergovernmental and national organizations and policy drivers, and to indicate the benefits, risks and limitations of these influences.

1.1 Equity Matters for Children

1.1.1 The concept of equity

The need for all children to have access to quality education, regardless of background, has become increasingly prominent in national and international policy agendas (e.g. Ball and Youdell, 2009; OECD, 2005; UNESCO, 2008). The importance of quality is advocated from early childhood onwards, based on substantial evidence that attests to the sustained impact of high quality provision on children's educational outcomes and life chances (see Education International, 2009; Urban, 2009). However, current international drivers for improving quality focus on technical characteristics, and have limited impact without attention to equity as an ethical dimension of policy and practice, for teachers and for children. This is particularly salient in view of consistent evidence that, after children's socio-economic status and home learning environments, the quality of teachers, and of teaching, is the key variable in improving equitable outcomes for children. However, there are contrasting ways of understanding the concepts of equity, quality, equality, inclusion, and diversity in education with reference to theory and research evidence.

Students differ in terms of their socio-cultural, and socio-economic backgrounds, and their life experiences, which may have differential influences on their educational outcomes. However, the principles of equity suggest that any differences in educational outcomes should not be dependent on factors such as student background, or quality of educational input, over which students have no control (Perry, 2009). 'Equality of opportunity for all students' is often described as the ultimate goal, although this concept is open to interpretation. Brown (2006: 510) distinguishes between horizontal equity (equal treatment of those who are equal) and vertical equity (unequal, but equitable, treatment of those who are not equal, designed to reduce inequality). These concepts are represented in Figure 1.1. Brown suggests that horizontal equity is a starting point (and precondition) that can be used to help achieve vertical equity. The key point is that vertical equity looks at whose situation can and should be improved, and how that can be achieved. This conceptualization of equity raises the question of whether vertical equity is warranted for specific groups in societies (such as children with

special needs and disabilities), or for specific issues (such as specialist teaching, distribution of funds between age phases or locations). If horizontal equity is a means and not an end, then this might suggest there are points of trading-off or trading-up between different equity goals.

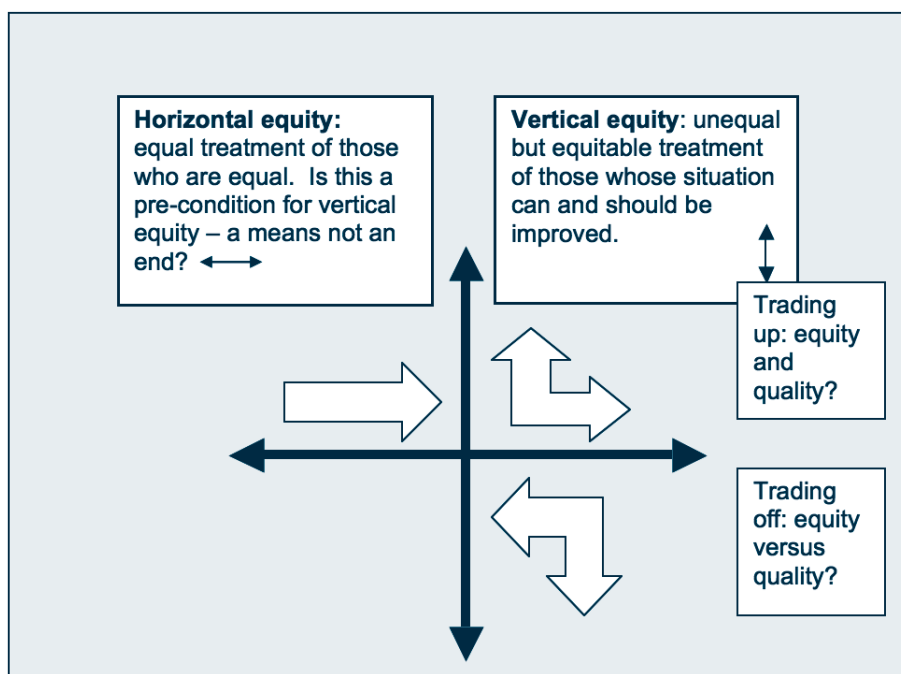


Figure 1.1: Horizontal and vertical equity (developed from Brown, 2006)

The recognition that education can either magnify or reduce socio-economic and cultural inequalities that exist outside of school is a pre-requisite for addressing equity in education (Matear, 2007). Affirmative action, where beneficial or favourable treatment is given to those who are disadvantaged in some way, to enable them to achieve as well as they are able, is often seen as key to reducing such inequalities. To achieve true 'equality of opportunity', the structure of opportunity needs to be understood. Educational structures often favour those with high levels of social and economic resources, and particular forms of social and cultural capital, so affirmative action is needed to ensure that inherent talent from all sections of society is allowed to flourish (Clancy and Goastellec, 2007).

Access to education can be seen as a first step in equitable provision, so all children are able to attend school and progress through the phases. But even where equality

of access is achieved there may still be differential provision and a hierarchy within the system. The next step might be seen as considering the quality of that education, particularly teacher training, teachers' pay and conditions of service, curriculum frameworks, resources and materials. But children need to be able to access *success* in learning (Clancy and Goastellec, 2007; Halinen and Jarvinen, 2008), which highlights the issue of whether educational equity is about ensuring that everyone has access to the same curriculum, knowledge and provision, or ensuring that the educational needs of all are met through differentiation (Lloyd, 2000; Perry, 2009). Furthermore, *accessibility* is a consideration, especially for children with special educational needs, and children in nomadic or travelling communities. Education has to be accessible through different means, such as adaptation of buildings, appropriate human and material resources, and outreach provision. Thus it can be argued that the concepts of horizontal and vertical equity (Brown, 2006) are useful to teachers' unions for understanding structural and process variables within education and wider social systems.

1.1.2 Factors that contribute to inequity in education

There are many factors that influence inequitable opportunities and outcomes in education around the world, including gender, income and socio-economic status, ethnicity, indigeneity, culture, religion, language, geographical location, conflict and war, malnutrition, physical health and ability, mental or psychological health and ability, sexualities, education level of parents (e.g. Atweh and Brady, 2009; Clancy and Goastellec, 2007; Jentsch, 2006; Matear, 2007; Perry, 2009; Skutnabb Kangas, 2002; UNESCO, 2008). Different countries use different sub-sets from this set of categories to define diversity, and assess how equitable their education systems are, with gender typically the most widely used category (Clancy and Goastellec, 2007). However, economic inequalities and social injustices do not work in isolation, and a combination of two or more of these dimensions of diversity (such as being poor, female and living in a rural area) can increase disadvantage several times over (Morely *et al*, 2009; UNESCO, 2008). In many countries, these factors have clear historical roots and trajectories. Co-occurrences of low achievement among some ethnic minority groups and low socio-economic status (SES) are common. South Africa, for example, no longer segregates by race, but a similar effect is manifested through segregation by social class when it comes to education, as those with the lowest SES are usually African and those with the highest SES are usually white (Brown, 2006; Lemon, 2005). Structural inequities can also be found in countries that are considered to be 'very highly developed' on the Human Development Index from the United Nations Development Programme (2009) (See Chapter 2). In many highly developed countries, such as the UK, Finland, Canada and the USA, ethnicity and low socio-economic status appear to be two of the main risk factors for underachievement in schools.

General social inequities in any country are often reflected in inequities in education. There is much evidence and comment on the mechanisms through which low SES and income impacts (directly and indirectly) on education, for example: through ability to pay school fees; the detrimental effects to a family's income of a child not being available to undertake paid work, due to school attendance (and more generally the proportion of an income that the cost of school attendance represents); the cultural and social resources available to interpret information and make informed choices in complex schooling systems; the quality of available schooling in disadvantaged areas; teacher supply, quality and retention; the cultural resources available at home to support education; and the accessibility of the mode of delivery of education to children from a variety of backgrounds (Brown, 2006; Giroux and Schmidt, 2004; Matear, 2007; Perry, 2009; Scheopner, 2010; UNESCO, 2008; Welsh and Parsons, 2006). In general, children from disadvantaged backgrounds do not achieve as highly as those from more advantaged or privileged backgrounds, and these differences can begin from the pre-school phase. For example, inequity in pre-school provision and care means that Universal Primary Education is hard to achieve: children who are cognitively damaged through malnutrition do not get much benefit from education (Education for All Global Monitoring Report, 2009).

Inequities in education can be revealed within preschools/schools (the differential effect that a school might have on the learning of different children), between schools (the differential effects of schools on the learning of similar children), and across school systems (the differential effects of schools on the learning of different children). Inequities in the effects of schooling suggest that even where some horizontal equity goals are achieved (such as access to education for all) there remain vertical inequities that are more difficult to address.

The quality of available schooling in disadvantaged areas in particular is the focus of much debate. Quality in this sense could refer to a wide range of variables in education, including: pupil-teacher ratios; teacher training and development; teacher retention and overall staff turnover; methods used in teaching; quality of buildings; availability of teaching resources such as text books and other equipment; and availability of extra-curricular provision and support.

Quality is also associated with technical characteristics such as test scores and other outcomes indicators, but in this regard there is not a direct relationship between quality and equity. The use of outcomes indicators may drive inequity, by creating a bigger divide between high and low quality schools. This has been exemplified in the UK and the USA, where the increased marketisation of the education system has meant that those schools with higher test scores are rewarded both in terms of being seen as more desirable by parents, and being allocated more resources from government. Such schools

are likely to have a relatively low proportion of disadvantaged students, and although in theory families are able to express a preference for schools, it is the less disadvantaged families who are more likely to have the social capital to be able to negotiate the complex admissions process in a way that would enable them to access 'high performing' schools. As a result, those schools with higher test scores continue to reap the benefits of a more privileged intake. In contrast, the more disadvantaged families whose children are likely to benefit most from such schools, are those who are least in a position to exercise such choice, whether that is due to geographical location, language, or cultural barriers. Those schools that are not seen as so desirable by parents have a more disadvantaged intake, lower test scores, and fewer resources from government, and therefore find it hard to escape the cycle of inequity and inequality. It is probably not a coincidence that "ineffective" schools are often found in disadvantaged areas, (as reported by Giroux and Schmidt, 2004; Taylor et al, 2005; Welsh, 2004; Welsh and Parsons, 2006). In a meta-analysis of teacher attrition in public and Catholic schools in the USA, Scheopner (2010) reports that, whilst some teachers are motivated to work in schools with high levels of disadvantage, often for altruistic reasons, it is harder to retain teachers serving low-achieving, low-income and minority students. Therefore teacher retention issues may also be implicated in the cycles of disadvantage that perpetuate inequity.

Similarly, in countries where top-up fees are paid by parents, those with higher top-up fees are better resourced, but the most disadvantaged sectors of society cannot afford to send their children to schools with high (or indeed any) top-up fees. So again, those who have most to gain from attending well-resourced schools, which may offer high quality education, are those who are least likely to be able to do so (Brown, 2006; Cele, 2005; Matear, 2007; Motala, 2009). Where there is selective entry by merit to education of a higher perceived quality, those who have had more access in the past to contexts that have enabled them to succeed will probably be most successful within and beyond school (Clancy and Goastellec, 2007; Taylor et al, 2005). Such access, as discussed above, may well be rooted in socio-economic status, and subsequently perpetuates the cycles of advantage associated with high social and cultural capital.

In summary, it is a widely-held view that education is a key to social mobility (e.g. Matear, 2007) and the lower quality of the education that is often received by the most disadvantaged sectors of society reinforces and perpetuates wider social inequalities. Recently, however, it has been suggested that as more people access higher levels of education, the relative social and economic advantage given by education is decreasing, and instead more advantage in the labour market is given to those who have the kinds of social capital demonstrated by the middle classes (Raffo and Gunter, 2008). However, recent debates about conceptualizing and evaluating equity and quality indicate that these concept remains complex and multi-faceted: it is difficult to 'measure' with

any accuracy the combination of the characteristics of educational provision, its effectiveness, and the outcomes that are achieved by children (at any stage of their educational careers) (Gorard, 2010).

The foregoing debates suggest that horizontal equity cannot be an end in itself, but can act as a means to vertical equity. However, this is where there may be trade-offs between holistic and fragmentary approaches. For example, universal provision for all children usually entails that there must be special provision for some. But in poorly resourced contexts, this raises the question of which groups of children should receive the special provision, and what are the implications for teachers. In addition, universal provision might increase equity, but may not improve quality or outcomes.

1.1.3 Equity and quality in education

At a very basic level, educational opportunities can be considered in terms of the percentage of school-age children enrolled at primary and secondary levels, completion rates of primary and secondary education, grade-level repetition rates, grade level reached, and number of years in education (UNESCO, 2008). In addition, access to high quality early childhood services and provision is seen as fundamental to improving children's educational outcomes and life chances. However, conceptualizing quality in terms of structural and process variables does not provide a clear picture of the equity of provision, and omits wider ethical concerns. This is partly because qualitative inequity can be harder to measure. Input expenditure and resourcing can be compared, but the quality of the teaching and learning that takes place, the conditions in which teachers work, and the wider socio-economic, cultural and historical contexts are less easy to assess.

Nonetheless, contemporary debates on equity in education do consider the nature of quality in education, and the relationship between the two. To obtain international budgetary support, many countries have to demonstrate that they can achieve both high quality and equitable access in education (Penny *et al*, 2008). But this is not necessarily straightforward. Policies that focus mainly on quality run the risk of poor equity, through marginalizing the least able students, as the institutions strive to meet 'quality' targets against which they are held accountable, and policies that focus solely on equity of access are at risk of losing some quality in outcomes (Atweh and Brady, 2009). For example, in Kenya, Free Primary Education has been a policy aspiration from 2003 onwards, but has encountered problems with feasibility and sustainability, with wide disparities in enrolments, between and within regions, between rural and urban areas and within urban areas, and between genders. Because of lack of infrastructure investment, free public education has been associated with low quality. Nonetheless, with an increasing international focus on equity, more national policies are coming to see equity as an integral part of, or at least a necessary condition

for quality. The research literature on school effectiveness has been highly influential in policy development in the last thirty years. However, this field has historically ignored or underplayed issues of equity (Alegre and Ferrer, 2010), and is beginning to consider the role that equity might play in measures of quality (Gorard, 2010; Sammons and Luyten, 2009; van de Grift, 2009).

Further consideration is given to efficiency and equity, or how much equity is likely to be improved by any given input of resources. High-quality early intervention (for example at pre-school or primary age) tends to mitigate the effects of social disadvantage on education (West, 2006), more so than later educational intervention (for example at secondary or post-compulsory ages). Early interventions could be seen as more efficient (Wößmann, 2008), partly because they are often targeted at children, families and communities and not just 'within schools' (for example, as evidenced in studies supported by the Bernard van Leer Foundation, 2007; 2009; Brooker and Woodhead, 2008). Such strategies, however, are long-term and reform is often determined by the current policy agenda of a country, rather than by longer term experience (Penny et al, 2008), or sustainability. Where resources for education are scarce, then the focus may be initially on expanding access to primary education via more private/fee paying schools but with the risk of lower participation (see Kruijjer [2010] for trends in sub-Saharan African countries).

Another example of achieving equity through resourcing is identified in the Millennium Development Goals report (2008). One of the goals is providing internet connectivity to countries in the developing world to improve educational provision. Access to Information and Communications Technologies (ICT) is increasingly seen as an indicator of equity and quality, even though there are problems with the 'digital divide' – differential access to these resources in schools, homes and communities. However, in addition to equipment, effective use of ICT relies on trained teachers as well as reliable equipment and sustainable support. These examples indicate the potential risks of trade-offs between holistic and fragmentary approaches to equity.

The consideration of what a "quality education" looks like is also contestable. For example, in England, the *Every Child Matters* (DfES, 2004) policy agenda promotes a range of outcomes for children's well-being and achievement which should, in theory, promote quality. However, in the UK as a whole, excellence in education has been defined as success in numeracy and literacy (Lloyd, 2000), and these subjects are the focus for testing at ages 5, 7 and 11. The outcomes of tests and examinations in primary and secondary levels are used as an indicator of performance of the pupils, and of teachers. Similarly, in the USA, the main aspects of education that are judged to be indicative of quality are test scores, possibly because they are easy to compare within and across schools. This is despite the fact that the USA No Child Left Behind agenda (similar to *Every Child Matters* in England) points to many important aspects of children's lives, which should all show some progress (Torres, 2004).

At an international level, comparisons of progress and performance are also used to provide indicators of equity and quality, with countries being ranked on 'league tables' of performance. The OECD uses PISA, TIMSS and PIRLS scores (international assessments that judge not only what students have learned but also how well they can apply that knowledge) to compare the educational progress of different countries. Although such scores do not assess interpersonal skills that might be required in later life, the tests are regarded as providing a less curriculum-focused assessment than most national tests. PISA, for example, is a statistical prediction of mean performance of different groups and is useful for revealing how equitable learning outcomes are, and how these are achieved both within and between schools, and across national education systems more generally. While such tests can allow for negotiation of some of the hazards of international comparisons, it is important to remember when comparing countries that education systems and their wider national contexts are not evenly matched, so to use certain countries as benchmarks for "what can be achieved" may, at times, be inappropriate (Alegre and Ferrer, 2010; Clancy and Goastellec, 2007). For example, the PISA data provides evidence that countries with greater equity and equality in their social systems achieve statistically better results. In Finland, the PISA results for mathematics indicate that, on average the lowest attaining children in Finland did much better than the same group internationally. The gap between the higher and lower attaining children was narrower than in other countries, which indicates that the lowest attaining children are out-performing those in other countries. However, context always matters and, as Finnish academics justly point out, there are specific social, economic and policy conditions in which their educational outcomes must be contextualised (Halinen and Jarvinen, 2008; Sahlberg, 2007).

Benchmarking across OECD countries includes mainly those in the 'highly developed and developed world', (which is also the minority world) but has informed the rhetoric of 'world-class' education systems which is applied to majority world countries. This is in spite of the fact that many OECD countries have deeply entrenched problems with equity, equality and quality in their education systems for minority groups (including indigenous populations), and in relation to gender. Furthermore, the 'globalization' agenda means that governments increasingly look to other countries for solutions to local educational problems, or to inform the development of their systems. However, uncritical policy-borrowing is inherently problematic because of differences in the evolution of educational systems over time, and the contemporary socio-political and socio-economic contexts of their development. Uncritical policy-borrowing also ignores the contextual specificity that is central to contemporary cultural theories of learning, and to informing equity and diversity (Guttiérrez and Rogoff, 2003; Hedegaard and Fler, 2008.) Any claims to 'world class' education systems must be tempered by the limitation of this term to predominantly developed (minority world) countries, and by their use of performance goals rather than equity goals (for teachers and for children). Many of the complex issues that are implicated in country-level education systems need to be addressed via policies which incorporate holistic equity values (as is the case in Finland).

The foregoing matters of equity and quality are major international concerns, because it is generally agreed that in many education systems across the world, children from disadvantaged backgrounds tend to achieve lower scores in academic tests than children from more privileged backgrounds (e.g. McGaw, 2008; UNESCO, 2008). In addition, within the broad term 'disadvantage', some groups will be more disadvantaged than others (such as Gypsy Romani Traveller children, [Levinson, 2007; 2008], other nomadic groups, and refugee and asylum-seeking children [Bourgonje, 2010]). The increased privatization and marketisation of education in many countries, where 'consumers' have a 'choice' of which school their children attend has led to discussions of the tensions between ensuring equity and quality (e.g. Morley et al, 2009). One of the implications of marketisation is that parents will want to send their children to schools which offer a high 'quality' of education, illustrated by high test scores in the school. In Uganda, for example, the introduction of universal primary education led to many richer parents anticipating a drop in the quality of education, and removing their children from publicly-funded schools and into private education. Following the exodus of more privileged children from the publicly-funded sector, the drop in quality did indeed occur (Penny *et al*, 2008). This illustrates an issue identified by Ball and Youdell (2009), that achieving equality is made more complicated by the fact that, in the majority (developing) world, these privatisation tendencies are embedded in, and in some instances accelerated by, efforts to establish universal education provision:

In these contexts privatisation tendencies frequently coexist with, or are presented as a vehicle for achieving, commitments to equality. These are rarely recognised at a policy level as being in tension, and the effects of this juxtaposition are yet to fully play out. (2009: 15)

The relationship between equity and test scores, though, is not clear cut. Some countries (such as Finland) manage to achieve high average test scores and high levels of equity across their education systems. Others, however (notably the UK and Australia) have high average test scores on international tests and low levels of equity according to social background (McGaw, 2008). Consistent with contemporary socio-cultural theories of learning, what seems to matter most, however, is not only the social background of an individual child, but the "average social background" of those in the school. Alegre and Ferrer (2010) demonstrate that the social composition of schools - and thus, the extent to which the distribution of different student groups amongst schools is even or uneven - contributes significantly to the explanation of inequalities amongst students' learning opportunities. They argue that students from disadvantaged backgrounds would benefit from mixing with those from more privileged backgrounds, and of higher ability. The suggestion is that, while those who underachieve at school would benefit from such a mix, those who perform well at school would not be disadvantaged by it. This suggestion is borne out by the finding that the success of

the most able children in schools across different countries differs little, but the support given to the least able differs widely between countries, thereby indicating that the impact of schooling and school systems is more profound on the most disadvantaged children (Perry, 2009). However, at the same time, policies and practices that focus on improving equity for pupils are also reliant on better teacher preparation and continuing education programmes, particularly in developing professional knowledge and understanding of how dimensions of diversity intersect, and how they are manifest in classrooms in ways that influence pupils' academic, social, personal and collective success (Milner, 2010).

The foregoing discussion indicates that equity matters for children in terms of their opportunities to participate in formal education, the quality of their experiences in school, the outcomes, and the long-term effects of their performance and achievement. In addition to institutional and structural influences, it is consistently evident that teachers matter in achieving equity for students, and ensuring quality of educational provision and outcomes. Indeed, issues of equity, equality and quality for children and teachers are inextricably linked, and are consistently the joint focus of teacher unions' policies. The second section turns to equity matters for teachers.

1.2 Equity Matters for Teachers

1.2.1 Why teachers matter

The foregoing issues surrounding equity and quality for children are also relevant for teachers. Teachers matter because they have a significant impact on student achievement and school quality (OECD, 2005; Scheopner, 2010). This is clearly exemplified in Finland where the high quality of teacher education and performance underpins children's successful outcomes, and the equity of their provision. Promoting national as well as international goals (such as Education for All) depends on improving teachers' professionalism through teacher education, and improving their conditions of service (Kruijer, 2010). However, whilst teachers are at the 'front line' of delivering or mediating national policies, they may also be working under conditions that do not ensure equity and equality for themselves, or for children. For example, in economically developed countries such as the Australia, New Zealand, UK, USA, educational reform movements have expanded teachers' roles in relation to standards and accountability agendas that link student achievement to teacher remuneration and performance. In a review of primary teacher education in Sub-Saharan African countries Kruijer (2010) analyses the challenges of expanding teacher supply, education and employment in relation to the expansion of primary education as a whole. What links these different education systems are wider issues about equity: teacher performance and student performance

may be influenced by non-academic factors which are beyond the remit of schools, and may or may not be addressed by country-specific social and economic policies. In addition, teachers work within systems that carry the legacy of structural and historical inequities, which influence what needs to be achieved, and what can be achieved within the resources available.

The legacy of historical inequity is implicated in 'the achievement gap' (Milner, 2010). The achievement gap amongst different groups or schools or countries is evidenced by standardized test data and international comparisons, and has become established as a powerful educational discourse in terms of where the greatest inequities can be identified (but interestingly the discourse does not always extend to identifying how these gaps can be addressed). Moreover, Milner draws on contemporary research to argue that the perceived achievement gap is an outcome of other gaps, including:

the teacher quality gap, the teacher training gap, the challenging curriculum gap, the school funding gap, the digital divide gap, the wealth and income gap; the employment opportunity gap, the affordable housing gap, the health care gap, the nutrition gap, the school integration gap, and the quality childcare gap. (2010: 125)

This matrix is useful for summarizing the ways in which structural inequities operate at many levels in countries' socio-economic systems, and how they may be manifest within education settings at all levels, and for all stakeholders. An example here is the 'curriculum gap'. Many countries have moved, or are moving towards, centrally defined curricula with defined learning goals/outcomes, scripted pedagogical routines and practices, and standardized assessments (Ball and Youdell, 2009). The underpinning rhetoric of such curricula is access, equity and entitlement.

The reality is that the curriculum may be narrowed to 'the basics' of literacy and mathematics, with teachers teaching to tests for those children who are underperforming or underachieving, thus reinforcing inequity and denying access to broad and balanced educational experiences. In addition, those countries that have embraced 'performativity' link teachers' remuneration and career progression to student outcomes, in spite of the fact that education, by itself, cannot ameliorate some of the conditions of children's lives.

It is useful to set Milner's perceived achievement gap alongside the United Nations (2008) report on the Millennium Development Goals, which include:

1. Freedom from poverty and hunger
2. Universal education
3. Gender Equality
4. Child Health
5. Maternal health
6. Combat HIV/AIDS
7. Environmental sustainability
8. Global Partnership.

This report identifies a matrix of equity gaps that are impacting on the achievement of those goals, and reinforces the relationship between economic inequalities, social injustice and the achievement gap. The issues that relate directly to education include:

- Primary school enrolment (currently at least 90% in all but 2 regions – Sub-Saharan Africa and Western Asia).
- Gender parity index in primary education (currently at least 95% in 6 out of 10 regions, but 95 out of 113 countries that did not achieve this are not on course to achieve this in primary and secondary education by 2015).
- “Poor children receive less or no education”.
- Poor people who do not produce their own food are in a bad position – high food prices mean that they cannot afford to get enough food or access education & health services (high percentage of income given over to food).

In order to improve equity, the MDG report calls for public investment and public institutions to spend more on education, health and welfare infrastructures. However, in relation to the concepts of vertical and horizontal equity (Brown, 2006) it may not just be that more resources are needed, but better targeted resources.

Milner's representation of the perceived achievement gap is useful for drawing attention to the intersections between areas of inequity in society, and how these impact on education. However, this should not be seen as a matrix of insoluble problems, but rather as a set of challenges in which teachers, unions and other stakeholders, can have transformative roles.

As indicated in the introductory section, aspirations towards improving the quality of educational provision rest substantially on teachers. Teachers matter within the educational effectiveness agenda because they are highly influential in securing



improved outcomes for children. This has been reflected in the aspirations of unions, governmental and non-governmental organizations to increase teacher supply and improve professional development. However, once teachers are recruited, there are many issues that contribute to inequity between and within countries. Teacher pay, qualifications, status, working hours, working conditions, training and development opportunities, access to study leave; systems of appraisal, and level of support and training provided in the face of reform all can contribute to recruitment, job satisfaction, motivation, retention, and ultimately the quality of education that is provided (e.g. Cele, 2005; OECD, 2005; Sahlberg, 2007; UNESCO, 2008; West, 2006). There are structural inequities within the recruitment process. For example, the costs of further or higher education may disadvantage aspiring teachers from low SES groups; the poor quality of schooling may disenfranchise those who have potential but not the required levels of attainment; and discourses such as 'primary teaching is for women' serve to disadvantage men.

Most countries have a 'mixed economy' of public and private education, with some public funding of private provision. The 'creep' of privatization and quasi-marketisation in and of public education, in countries with developed and developing economies, is also seen as a threat to equity for teachers, as Ball and Youdell (2009) argue:

Forms of privatisation change how teachers are prepared; the nature of and access to ongoing professional development; the terms and conditions of teachers' contracts and pay; the nature of teachers' day-to-day activities and the way they experience their working lives. As the major 'cost' of educational delivery, teachers themselves become the focus of attention when economic rationalities are brought into play within education policy. Private providers of state education services often do not want to be hampered by the constraints of national pay agreements and restrictions on employment related to teachers' qualifications. There is pressure to substitute cheaper workers or introduce short term contracts or systems of performance-related pay. (Ball and Youdell, 2009: 14-15)

These trends indicate tensions for teachers, and for teachers' unions, in relation to the concepts of horizontal and vertical equity. On the one hand, the demands on teachers' knowledge and professionalism are increasing (in relation to complex societal changes). If policies that focus on vertical equity are pursued, then it might be assumed that teachers' pay and career progression might be enhanced accordingly. Such enhancements might be given, for example, through targeted pay or incentive payments to work in specific schools or localities, or to work with specific groups of children to improve outcomes. On the other hand teachers' conditions of service may be changed in ways that erode horizontal equity (for example through differential pay and conditions of service in the private and public sectors, or in different phases of schooling).

Teachers also matter because they are at the intersection of implementing national or school policies in ways that are age- and culturally-appropriate for children. However, where national policies do provide guidance on improving equity and equality, teachers often find themselves in the position of negotiating paradoxes and finding solutions to dilemmas which result from the abstract nature of national policies, and assumptions about their universal application. An example of this is given by Coles (2008) in the context of the policy 'Every Child Matters' (ECM) (DfES, 2004) in England, which aimed to improve outcomes for children beyond the remit of the curriculum subjects. ECM relies on universal conceptions of children as a homogenous group. In contrast, Coles (2008) demonstrates the ways in which these policies need to be differentiated in their application to different minority and ethnic groups in relation to academic and welfare issues. Focusing on Islamic communities, Coles argues that the ECM goals should be informed by Islamic perspectives on the social, cultural and educational needs of Muslim children. These recommendations could be extended to include the spectrum of social and cultural diversity: teachers need culturally situated knowledge of children's home and community lives, which can lead to better informed ways of developing authentically inclusive practices in order to improve equity.

Milner (2010) makes similar claims based on teacher education programmes in the USA, and calls for the development of diversity studies alongside the traditional focus on instructional practices and subject knowledge. He argues that teachers can create a culture of power within classrooms which can be gravely inconsistent with students' experiences (2010), and can create roadblocks to social justice and equity. For example, focusing on the Gypsy Traveller community in England, Levinson (2007) argues that the social and cultural capital that is developed in minority communities can be manifest in schools as 'negative assets'. This may be because teachers do not understand how cultural ways of knowing influence children's different repertoires of participation (Gutiérrez and Rogoff, 2003). These evidence-based perspectives demonstrate that forms of social injustice have different roots, different pathways and different outcomes, which suggests that vertical equity is both necessary and desirable for children. But in what ways does this impact on equity for teachers? These issues are explored further in the following section, in the context of the impact of current policy discourses and trends in teacher education.

1.2.2 Teacher education – in-service and continuing professional development

If teachers matter, then teacher education programmes also matter to their professional preparation and development, and the extent to which they are able to contribute to a social justice agenda. Internationally, there are consistent calls for more, and better, teacher education at pre- and

in-service stages. However, changes to teacher education are evident in several countries, and are being informed by neo-liberal and neo-conservative discourses. In the USA established (typically university-based routes to qualified teacher status) are being supplemented by alternative fast-track routes, including online programmes; summer programmes, that lead to temporary licensure; and residency programmes (Kumashiro, 2010: 57). Similar initiatives in England include the Graduate Teacher Programme, School-Centered Initial Teacher Training and Teach First, and are likely to gain further momentum under the policy direction of the Conservative-Liberal Democrat coalition government.

Kumashiro (2010) argues that such initiatives signal not only an increase in competition for teacher preparation programmes, but also a devaluing of teacher education altogether: this devaluing is consistent with neo-liberal and neo-conservative discourses in which teaching is seen as 'common sense'. This position reflects trends over the last two decades which have been targeted at the uniform professionalization of teaching, with many countries working towards professional standards and competences (for example, the four UK countries, New Zealand, USA), and regulation through inspection. In contrast, professional autonomy needs to be sustained and valued. Kruijer (2010) describes programmes aimed at upgrading unqualified teachers in sub-Saharan African countries, in response to the supply of ill-trained or untrained teachers in primary schools. Kruijer documents the positive contribution this policy can make, alongside the conditions that need to be achieved to ensure the success of upgrading programmes, especially if they are to make an impact on equity and quality. As Kirk argues, whilst it is the responsibility of national governments to oversee the quality of the teaching workforce, there is a need to strike a more appropriate balance between professional autonomy and public accountability in teaching (2009: 12).

There are global trends towards the adoption of new policy technologies in teacher education (regulation of teacher supply, professional standards, performativity, national and international benchmarking, school inspection regimes). However, there are limitations in the scope and impact of those policies on equity and quality. If concerns for social justice are excluded or marginalised in teacher education programmes, then policy technologies may serve to improve performance (of teachers and of children) against a narrow set of 'measurable' targets, but may not improve equity or guarantee quality. As Sahlberg (2007: 147) argues in the context of Finland, the steady improvement in student learning has been attained through education policies based on equity, flexibility, creativity, teacher professionalism and trust. Unlike many other education systems, consequential accountability accompanied by high-stakes testing and externally determined learning standards has not been part of Finnish education policies.

In the first section, it was established that schools in disadvantaged areas may be faced with the legacy of structural and historical inequity (this also includes 'outreach' provision for Traveller and Indigenous communities). At a broad level, historical inequity has ramifications throughout the education system for children and for

teachers. For example, although post-compulsory education may now be theoretically more accessible in many countries, certain groups in society would not be well-equipped to take advantage of this due to inequitable access to quality education in earlier years (Brown, 2006). More specifically, there may be a desire for teacher recruitment patterns that are representative of a wide range of groups in society, but recruiting those who are themselves from disadvantaged backgrounds may be difficult. Aspiring teachers from such backgrounds may not have had the opportunities to be educated to a high level, so would not be eligible for teacher recruitment (UNESCO, 2008). Therefore in countries that experience 'teacher shortages', this may again be linked to structural inequities, so the cycles of disadvantage that occur for students also occur for teachers in terms of recruitment, training and development, and retention. The OECD report 'Teachers Matter' (OECD, 2005), focused on the key country-level trends in attracting, developing and retaining effective teachers. Nearly 50% of the participating countries reported concerns about teacher supply and retention. The reasons cited included the declining status of teachers' salaries, and of teaching as a profession, poor working conditions and increasing workloads.

These issues may be exacerbated by the ways in which the 'global economic downturn' is affecting country-level changes in overall status and working conditions for teachers, alongside neo-conservative trends towards the marketisation and privatization of education. Other threats to equity for teachers include the erosion of agreements on national pay and working conditions, the erosion of collective bargaining via teacher unions, the increase in locally differentiated employment contracts, and the increasing use of 'para-professionals' who may be used instead of, rather than alongside, qualified teachers. Thus, whether education is funded by the private or public sector, or via private-public partnerships, there are likely to be points of 'trade-off' between equity and quality for teachers in their conditions of service. However, addressing structural inequities is part of a much wider endeavour, and what matters to teachers are the conditions under which they work on a day to day basis. In a review of international empirical research on attrition of teachers, focusing on public and Catholic schools in the USA, Scheopner (2010) identified some of the positive conditions that influence teacher retention such as good leadership, having access to a mentor and to advice from curriculum specialists, collegiality and positive relationships with colleagues, and developing personal resilience and self-efficacy.

In summary, the foregoing review indicates that equity matters for teachers and for children. Different countries have different trajectories of development towards a social justice agenda that incorporates goals for equity, equality, quality, inclusion, access and diversity. It might be assumed that some countries are further along this trajectory than others, or that there is a clear demarcation between 'developed' and 'developing' countries. However, global trends indicate common threats to education systems which may halt or reverse policies that have aimed towards improving provision and practices. Some of these issues trends are illustrated in Chapter 2 and Chapter 3, which focus on the data analysis from the Equity Matters study.

CHAPTER 2

Findings from the Survey Questionnaire

Contextual Information

The purpose of this section is to report the findings from the questionnaire survey. Full details of the responding countries (Total 32 including 3 pilot questionnaires) and case study countries (Total 6) are provided in Appendix 1, including the full names of unions with the abbreviations used in this report. The survey questionnaire can be found in Appendix 2.

2.1 Unions' Concepts, Goals and Policies

2.1.1 Unions' policy statements on equity

Question 1 of the country-wide survey asked unions to provide their policy statements on equity. Where such policies did not exist, unions were asked to outline their viewpoints on equity matters. Five unions had no specific equity policy formulated. The majority of unions had wide ranging policies that included broad principles of equity, and some (such as UK and Australia) had more detailed policy statements that focussed on specific areas for teachers and children. Equity was sought across categories defined in a variety of terms, including:

- gender, sexual orientation, sexuality, LGBT persons,
- race, religion, ethnicity, marital status, colour, creed, ethical or religious beliefs,
- ability or disability, age, political opinion, employment status, family status, social class /income /rich and poor, second language learners.

It should be noted that not all unions paid attention to all these categories in their policies. For example, the equity goals for Malaysia and Kenya outline broad and specific policies which combine vertical and horizontal goals.

Malaysia NUTP

- No child should be left behind including stateless children.
- Free education for all children
- Provision of scholarships to children with good academic results to further their studies.
- Creating vocational schools and skill training centres for the other groups.
- To mould holistic child with different values and best practices

Kenya Kudheiha Workers

- Free primary education
- Government aids to secondary education
- Constituency development funds: 50% channelled to education (building classes, buying books and stationery).

Across all union responses, the areas targeted specifically for equity policies for teachers include:

Equal pay, equal treatment, equal conditions and salaries, modelling principles of equity in union practices, equal opportunities for career progression regardless of sex, preventing discrimination on the basis of trade union membership.

The unions provide advocacy and lobbying functions across the areas identified above, in education and wider social policy, including:

- funding;
- equal access to education (including children with disabilities/special educational needs); education as a human right;
- education as a base for social cohesion, social justice and democratic development;
- education as an aspect of public and governmental funding and responsibility;
- advocacy against intolerance, prejudice and discrimination;
- fair and transparent selection procedures;
- fighting against a limited access to education for certain social groups (depending on their financial status and social background).

These broad categories indicate that goals and policies incorporate the interests of members, as well as the interests of young people. The following policy statement from the Teachers' Union of Ireland (TUI) indicates specific areas of activity which illustrates this point:

TUI policy on equity is documented through various motions agreed at our annual congresses over a number of years. These include fair and transparent selection procedures for entry to second level schools requiring all schools to enrol a mix of students in accordance with the local demographic profile; disability/special needs, ethnic minorities, socio-economic profile etc; additional resources (staff, grants, facilities) to ensure schools can meet the needs of particular and special interest groups within mainstream settings; special educational needs; ethnic minorities; those for whom English is a second language; additional weightings for schools (teacher numbers, grants, supports for schools in areas of high socio-economic disadvantage).

The Statement on Equity for the Australian Education Union (AEU) is detailed and comprehensive. It is included in Appendix 4 as a potential example to unions that are in the process of developing or refining their equity statements. The equity goals for the AEU are linked to strategic policy directions, encompassing different levels of governance (commonwealth, state and/or region), and alliances with other organisations. The statement illustrates firstly, the ways in which horizontal and vertical equity goals are targeted, and secondly, that whilst horizontal equity is desirable, vertical equity policies are necessary to address country-specific goals:

The AEU supports public schooling. Public schools and public school educators provide an inclusive and comprehensive environment in which all students are welcome, in which their special needs are recognised and met, and in which each student is supported to develop to his or her maximum potential regardless of cultural, social, economic, ethnic background, gender, sexual preference or personal circumstances. (Horizontal equity statement)

The AEU supports curriculum, pedagogical and educational practices that lead to greater access and equity for all students, which reject the exclusion and alienation of any students, and which recognises the importance of high expectations. (Vertical equity statement)

In general, the unions' statements include broadly horizontal goals, with some vertical goals, and suggest that equity needs to be achieved through differentiated provision and funding for specific groups of children, and by targeting specific aspects of teachers' work. In both areas, there is an implicit assumption that equity is an intrinsic aspect of quality, and whilst these can be seen as interdependent, they are not easily achieved across all areas of unions' aspirations and activities. Thus there is a combination of holistic aspirations towards many areas of equity, but with evidence of targeted policy initiatives that address specific issues. Some of these policies are pro-active, and some are re-active, the latter being an outcome of wider issues, such as changing economic conditions, migratory patterns, and policy directions.

It might be expected that, where given, the unions' policy statements on equity would include this range of issues. However, it may be that those unions who do not have an equity statement, or who are currently formulating one, might benefit from considering the more detailed equity statements of other countries. Additional details of unions' statements and the remit of their activities is available on their websites, along with details of current campaigns.

2.2 Equity issues in union and government policies

34 Respondents were asked to select from 15 statements about equity matters to indicate which equity issues are included in government policies, and which have been

implemented in practice. They were able to add any policies that were not included in the list. The respondents were then asked to indicate which of these equity matters were most important for teachers and for students. The summary of the responses has removed the gaps in the data, which were due to respondents selecting 'don't know' or omitting a response. (The total non-response is 67 for whether a statement is in union policy, and 62 for government policy, spread over 15 statements).

Most of the equity issues are contained in union policies, with 22-27 respondents stating each was in union policy. For each statement, 2-5 respondents stated they were not in union policy. Likewise most of the equity issues are addressed in government policy, with between 24 to 29 respondents stating each statement was represented, and between 1-3 respondents stating each was not in government policy.

The areas targeted in union policies for teachers included equity in relation to career opportunities, conditions or service and pay. The areas targeted in union policies for students included equity in relation to access to education, opportunities to achieve and access to resources. The two areas most often omitted from union policies were 'equity for students with physical disabilities' and 'equity for students with learning disabilities'.

The unions' views were that a similar set of concerns were reflected in government policies. However, these government policies were often seen as 'not implemented as yet' (for example, more than 50% of respondents stated that their governments had not yet implemented their policy for equity in resource distribution or their policy for equity by social class). For the item 'equity for teachers in terms of conditions of service', the unions in Germany, Lithuania and Morocco all state this is not in government policy.

Some unions commented that although some of the policies were in union and/or government policies, it was difficult to state that they had been implemented fully, or achieved. This is because many equity and equality matters are ongoing. The National Association for Schoolteachers and Union of Women Teachers (NASUWT) respondent (England) indicated that the union:

works to ensure that all aspects of its work embeds its commitment to promoting equality and diversity and tackling discrimination and prejudice. However, in relation to Government, while it would be possible to point to aspects of policy and legislation that aim to address the areas highlighted in the questions set out above, the NASUWT's view is that inequities can be identified in all these areas. In this respect, none of these aspects of Government policy can be said to have been implemented fully given this incomplete achievement of these objectives.



This comment is useful for highlighting the ongoing development of unions' goals and policies for equity, and the extent to which those goals can be 'fully' achieved. It is also interesting to note that, because of the 'global economic crisis' some equity goals have been halted, or even reversed. For example, the Association of Secondary Teachers Ireland (ASTI) respondent, noted that the 'State has a specific policy for promoting equity in education for our indigenous minority, the Traveller (nomadic) community', but the case study indicates the reversal of some aspects of policy for this group. Similarly, the respondent for Canada (see case study), noted :

The growing threat coming from international efforts (just arriving in Canada) of conservative fundamentalist arguments for tying teacher tenure and compensation to their students' outcomes on narrow standardized tests.

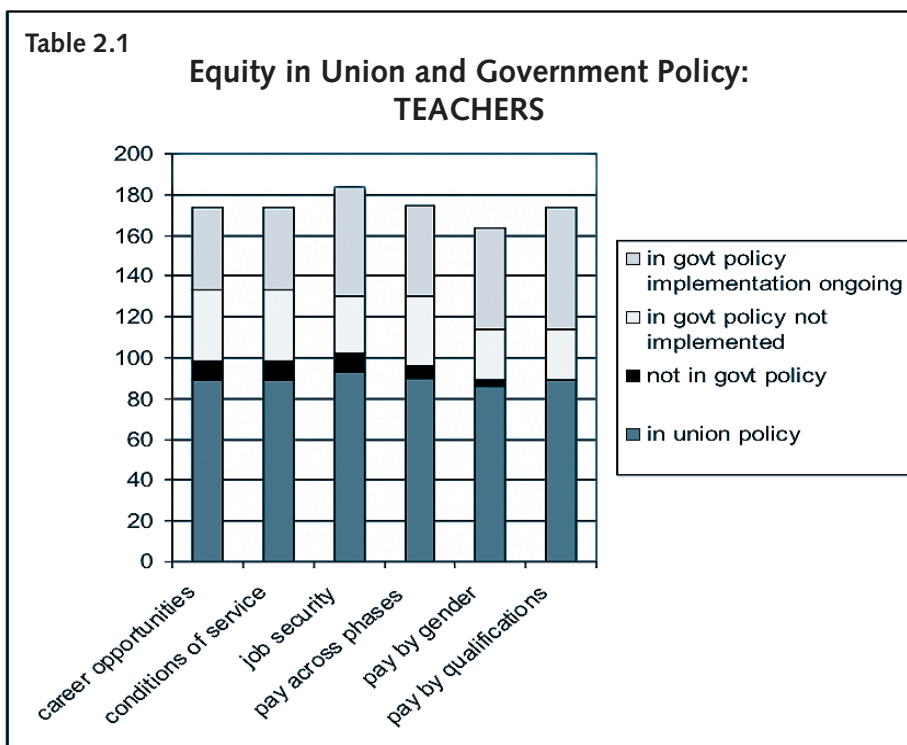
The New Zealand Education Institute (NZEI) identified a number of threats which would undermine the need to 'raise the tail of underachievement', ranging from early childhood to tertiary education :

Sadly government education policy is removing a number of 'learning pathways' through rising tertiary fees, and encouraging targeted tertiary funding towards employment and entrepreneurial pathways. Many faculties have been cut or dismantled, such as the Early Childhood Education faculty at some universities.

These responses indicate that aligning equity and quality is an ongoing challenge. Whilst unions may conceive equity as an intrinsic value across the range of their activities, and as an intrinsic part of the quality of education, equity and quality goals may be placed in a trade-off position. For example, where students' outcomes are judged on subject-focused standardised tests, the curriculum may be narrowed, and the quality of a broad and balanced education may be compromised. Trade-offs may also occur between different phases, for example reducing public funding for early childhood education to maintain funding for tertiary education. Dynamic and shifting social, political and economic agendas also influence the extent to which unions can sustain holistic rather than fragmentary approaches. In addition to equity matters being ongoing aspirations in unions' and/or governments' policies, it is also pertinent to remember the matrix of gaps identified by Milner (2010), because some aspects of equity in education are reliant on equity in other areas of social policy (such as housing, welfare, health).

2.2.1 Additional equity issues

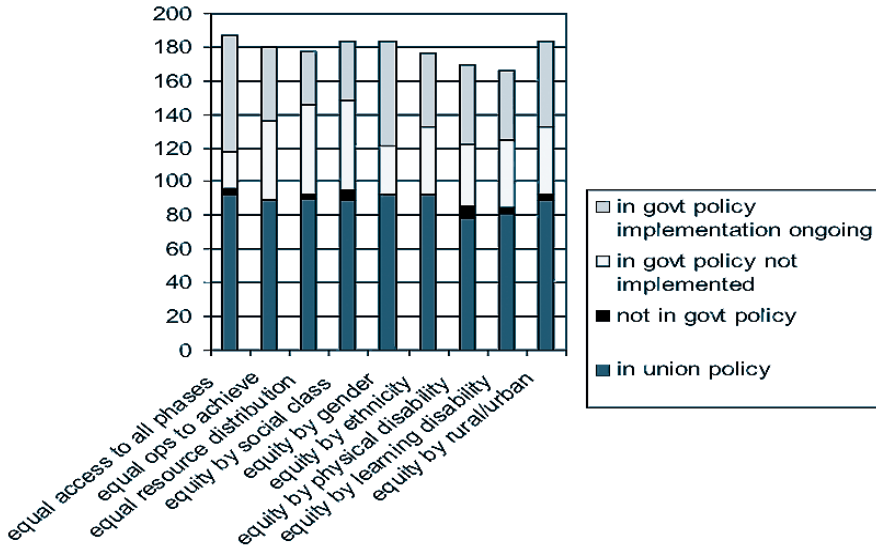
In Question 3, respondents were asked to identify additional equity issues, and to indicate whether they were in union and/or government policies. Respondents were asked to identify the 3 most important equity issues in unions' policies for students, and for teachers, and to give reasons for their choices for both groups. The issue of context clearly matters in the unions' responses. Some of the respondents noted that it was difficult to indicate which of the items were 'most important', because all were important in unions' policies, and some items (such as funding, gender and socio-economic status) influence equity across the other items. However, where priorities were stated, the most frequently prioritised areas for children were equity in terms of educational access and educational outcomes; for teachers they were conditions of service, career opportunities, job security and pay and qualifications. These responses are illustrated in Tables 2.1 and 2.2.



In Tables 2.1 and 2.2 each bar represents the % of respondents giving each answer (e.g. for teachers, 89% of unions included equity in career opportunities, 9% said that this was not part of government policy, etc)

Table 2.2

Equity in Union and Government Policy: CHILDREN



Unions often stated that although progress was being made, that progress was slow. The different issues identified were related to each country's broader cultural and economic circumstances, and educational histories. (For example, in a period of economic uncertainty in Ireland, much concern was expressed over such matters as equity in job security). However a key issue was that, in order to achieve equity, boys and girls, and other minority/disadvantaged groups within countries' populations, may need to be treated differently through the provision of specific programmes or interventions, specialist teachers or dedicated funding, which indicates a commitment to vertical equity. The inter-relationship between items is exemplified by the German respondent in the context of their importance for students' outcomes:

- Equity of educational access: We have a highly selecting school system.
- Equity for students of all socio-economic backgrounds: The selection is superficially done by performance, but in fact by social background.
- Equity for students with disabilities: After the ratification of the UN convention for People with Disabilities by the German government, equity for these students is a very urgent issue.

The respondent for the Teachers' Union of Ireland (TUI) indicated that equity of resource distribution is important because :

Weighting of resources in favour of particular interest groups is, in many cases, necessary to ensure that they have equal opportunities [and is] an important mechanism to allow schools to offer adequate service according to student population and needs.

2.2.2 Equity issues for students and teachers

That educational outcomes, access, and resource distribution appear most frequently in the findings is perhaps not surprising because these are fundamental to achieving horizontal and vertical equity. These three items are also referred to in relation to other equity issues.

Gender for students was mentioned as an additional factor by 5 respondents. An issue that arose in the survey questionnaire and case study responses was the level of specificity given about gender issues in relation to achievement. Ghana notes positive discrimination for 'the girl child' and women in education, stating that it is policy at both governmental and union levels that 'special attention should be paid to the right of girl-child and women to education in view of their special circumstances'. In contrast, the NASUWT's statement was quite broad :

Educational provision must be established that ensures that boys and girls are able to have their educational needs met effectively and which allows them to reach the highest level of attainment of which they are capable. This can require the deployment of approaches to curriculum design and implementation that are designed specifically to address gender inequalities.

These examples raise the issue about broad and specific inequities, which is relevant across the survey in relation to the concepts of horizontal and vertical equity. Responses indicated that unions often saw equity issues as more complex and more targeted than is implied by discussion of general categories such as 'boys' and 'girls'. For example, in England (as in other countries), gender inequities can be identified broadly on the lines of socio-economic status, ethnicity and differential outcomes of boys and girls. However, it is specific groups of boys and girls (rather than boys or girls generally) who suffer the most marked inequities in terms of their school achievements, and the longer-term impacts of relatively lower outcomes. The case studies for Ireland, Canada and New Zealand identify the groups in which children are more/most marginalised, and for whom specific interventions might be needed (notably children from Indigenous and Traveller communities, and children with special educational needs and disabilities).

The respondent from ZPSaV NKOS Slovakia noted that it is important to secure the same opportunities for 'the weak socio-economic students'. The key issue here is that, in order to achieve equity, boys and girls, and other minority and disadvantaged groups within countries' populations, may need to be treated differently through the provision of specific programmes or interventions, specialist teachers or dedicated funding.

Focusing on gender equity and teachers, the NZEI union stated that although gender equality in terms of pay and employment equity is a union policy, there is a disparity of pay between those working in the early childhood phase (up to age 6), from those working in the primary and secondary phases. The NZEI respondent noted that the government has 'refused to acknowledge the results of pay investigations for some of the sector's lowest paid women workers, and undone gains made by previous governments in this area'. (It should be noted that NZEI represents a range of educational support workers as well as teachers). Lithuania has a Council of Equal Opportunities which is 'responsible for the raising of public awareness towards equity, accepts and solves cases of complaints in the field of equity and gives consultations'.

The Cyprus Turkish Secondary Education Teachers' Union (CTUEW) union also provides legal protection and representation in cases of gender discrimination. Zambia notes that there are more female teachers in urban areas, and that the posting of married teachers to rural areas needs a range of policy solutions (The case study for Zambia gives further details of why these are equity issues for teachers and for children). Norway has an 'Inclusive Workplace' agreement, which states that there has to be a '40% female share' on every private and public board. Where teachers do have equal pay (for example England, Ireland and New Zealand have equal pay for men and women across the sectors) they may not have the same opportunities for promotion and salary progression because they may be in smaller schools, or in early childhood (kindergarten) settings. The New Zealand PPTA respondent noted that men outnumber women in promotional positions, which is reflected in income distribution statistics.

With reference to Conditions of Service, the respondents from Ireland raised the issues of job security for all, salary reduction and pension inequities for new teachers (all of which have been caused by 'austerity measures' as a result of the impact of the economic crisis - see case study for Ireland for further details). The ASTI respondent indicated the fragility of teachers' conditions of service: 'An emerging issue is the need for maintenance of high professional standards and non-admission of non-qualified personnel into teaching'. This fragility is reflected in other responses. In Serbia, the three most important issues were pay and level of qualifications, job security and conditions of service. This is because salaries have been frozen for two years so teachers have 'a bad material position'; equity of pay for teachers in preschool education has not been implemented; and there are redundancies as a consequence of Government reforms in education, including changes to the pension scheme. In the Netherlands, some rural

areas are coping with a decreasing population, and decreasing numbers of students, which means that fewer schools are needed, and jobs are being lost. The New Zealand PPTA also commented that teachers suffer relative disadvantage because of geographical isolation, for example, due to lack of resources, professional development and professional support.

In Poland, the respondent stated issues around sex education and sexuality, noting that schools base their position on the teachings of the Catholic Church in this regard. (It might be implied by this statement that equity issues for gender, LGBT, sexualities are more difficult to advocate or to achieve under these conditions). The respondent from Lithuania identified two issues: gaining new qualifications for teachers, and equity for teachers in terms of pay.

2.2.3 Barriers to achieving equity

This section focuses on whether there are any barriers to achieving equity, and asks respondents to provide examples. The majority of respondents (21) indicated that there are barriers to achieving equity.

Some unions saw no barriers to the achievement of equity, and others identified a range of barriers which are detailed below. As well as the amounts of financial and other resource available, there were concerns about the uneven distribution, misuse, mismanagement or misdirection of resources. There was broad agreement that those particularly affected by these barriers were often children with special educational needs and disabilities, those in low SES and deprived communities, and ethnic/cultural minority groups. As a general rule, inequities in countries' socio-economic systems were mirrored in their education systems.

The main issues regarding **funding** include:

- Differentials between public and private sectors;
- Differentials between regions and groups (for example urban/rural funding; under-funding of indigenous students, and of students with special educational needs and disabilities);
- Deficit or inadequate funding, for example to ameliorate socio-economic disadvantage.

Issues of funding also underpin some of the main issues in the categories of **culture and ethnicity**, and **special educational needs**:

- Underfunding and inadequate policy response to the particular needs and circumstances of Indigenous students;



- Barriers to access to leadership positions for black and minority ethnic teachers;
- A system of education and curriculum that is still largely euro-centric in nature that fails to cater adequately for those from different cultural/ethnic backgrounds;
- Schools have insufficient supports to cater effectively for those for whom English is a second language;
- Integration of disabled children is done without the necessary resources, with the consequence that even teachers who are in favour of this in theory are now against it;
- (Lack of) adequate funding for students with learning disabilities;
- Schools have insufficient supports to cater effectively for those with special educational needs.

There were four main issues relating to **curricular inequality**:

- The need for self-managing school systems that enable schools to determine and interpret curriculum contextually;
- The extent to which the curriculum and qualifications structure supports the promotion of equality and diversity;
- A system of education and curriculum that is still largely euro-centric in nature that fails to cater adequately for those from different cultural/ethnic backgrounds.

The lack of adequate funding for education was considered in relation to wider socio-economic inequalities and disadvantages, as illustrated in the following statement:

Research is consistent in indicating that children from low income families, including those dependent on social assistance, have lower literacy levels, leave school earlier and experience more difficulties while at school.

The category **Conditions of Service** includes pay, teacher training and professional development, and policy reform movements. Teachers' pay was a concern, with 'tough negotiations' taking place for two unions, and threats to other teacher groups, such as low (and differential) pay for those working in pre-school settings (which may also account partly for the lack of men working with younger children). There were inadequacies in professional development, specifically for 'up-skilling' teachers to work with children with special educational needs, and English as an additional language. The urban-rural divide also impacts on the lack of teachers for working in rural schools (with a parallel lack of resources), but with other issues, such as housing, also influential in teacher deployment and employment (see case study for Zambia).

One country identified 'shortcomings in educational reforms', again with tough negotiations taking place.

The combination of policy reforms and the global economic crisis are also influencing the reduction of the number of teachers, leading to larger class sizes in secondary schools. These trends are occurring at the same time as shifts in government funding from the public to the private sector. As one respondent noted, there are 'Excessive amounts of public funding to private schools at the expense of adequate funding for public schools'. This is also linked in some countries to a selective school structure, and to 'a selective philosophy even in schools themselves and in the minds of teachers and parents'. These issues reflect neo-liberal trends towards labour market flexibility, commodification of public services, and the restructuring of social protection via private providers. This comment summarises a perspective that was shared by several unions:

Schools cannot compensate for society and notwithstanding the best efforts of the State and the development of various interventions to "target" educational inequalities, the external environment is still dominant.

Other miscellaneous equity issues included:

The impact of far right racist and fascist organisations on the schools system
Prejudice related bullying
Shortage of teachers
Trends of privatization and deregulation
The mainly half-day school system
Mismanagement issues
Lack of follow through on policies
Main barriers are the broader inequalities in Irish society

The key finding that emerges from this section is the interrelationship between three areas: there are a range of structural barriers that impact on equity matters (and on the quality of education). These create barriers to equity for teachers and for children. Table 2.3 summarises some of the responses to these questions in these three areas: structural barriers, barriers for teachers, barriers for children.

Table 2.3: Barriers to achieving equity: the impact of structural barriers on teachers and children

Structural barriers	Barriers for teachers	Barriers for children
Conditions of service Discrimination	<ul style="list-style-type: none"> • Access to leadership positions for black and minority ethnic teachers • Impact of age discrimination on teachers and the education system • Pay and salaries, promotion 	Lack of positive role models
<ul style="list-style-type: none"> • Funding/resources, distribution • Management/mismanagement 	<ul style="list-style-type: none"> • Salaries, regional disparities, urban/rural inequities • Teacher shortages • Excessive amounts of public funding to private schools at the expense of adequate funding for public schools 	<ul style="list-style-type: none"> • Buildings and facilities, support for learning, quality of provision (especially for SEN, minority and indigenous students) • Most students with SEN in public section schools – lower funding. Class size. Access to internet and ICT
Broader inequalities in society, very unequal income distribution	Schools cannot compensate for society	Impact on children and families – achievement and outcomes
ITE and CPD	<ul style="list-style-type: none"> • Inadequate teacher professional development (quantity and quality) • Up-skilling needed especially to teach children with SEN, minority and indigenous students, second language learners 	<ul style="list-style-type: none"> • Lack of skilled/specialist teachers • Lack of, or poor quality ITE and CPD to meet demands and expectations
Privatisation and deregulation	Selective philosophy even in schools themselves and in the minds of teachers and parents	Selection, choice, access to schools for children with special educational needs and/or physical disabilities, and from low-SES groups
Urban/rural	Teacher supply	<ul style="list-style-type: none"> • Fewer educational resources in rural areas – human and material. • Access to education in rural areas.
Demographics	Teacher demand/supply	Lower school enrolment leads to reduced funding.
<ul style="list-style-type: none"> • Education reforms and policies • Impact of economic crisis 	<ul style="list-style-type: none"> • Teachers' pay and conditions • Privatisation • Reversal of some policy gains in pay, pensions 	<ul style="list-style-type: none"> • Curriculum 'Euro-centric' – fails to cater for those from different cultural/ethnic backgrounds • Curricular content, choice, and focus • Inadequate policy response the particular needs and circumstances of Indigenous students • The extent to which the curriculum and qualifications structure supports the promotion of equality and diversity

Funding and resources underpin most of the areas identified here, although there are concerns about the misuse, mismanagement or misdirection of both. The country-specific responses in the survey questionnaire give more contextual detail about some of the socio-cultural differences between countries, which explain specific inequities:

In the "inferior" school forms are mainly those children with a difficult social background or a different cultural background. Most schools are not really barrier-free for people with disabilities. Boys in several disciplines perform much worse than girls. Girls have much worse opportunities after compulsory schools going into the job market than boys. (GEW, Germany)

The main barrier is the selective school structure. Other barriers are: a deficit funding; a selective philosophy even in schools themselves and in the minds of teachers and parents; trends of privatization and deregulation; the mainly half-day school system. (GEW, Germany)

Regarding these three areas (structural barriers, barriers for teachers and barriers for children) as interrelated indicates that there are potentially virtuous and negative cycles of inequity. For example, the case study for Zambia indicates that when young women do not have access to secondary or tertiary education, they cannot gain the qualifications needed to enter teacher education programmes. These factors then impact on the supply of female teachers, and the lack of positive role models for girls. Issues of access to education (for boys and girls) are compounded by rural/urban funding and resourcing, as well as wider socio-economic and socio-cultural factors. In Serbia, students from poor families cannot afford fees for higher education, and students from rural areas have no access to different education institutions in higher secondary education. Similarly the barriers identified in the quotations above from the GEW indicate that structural inequities in society are mirrored in the education system. A negative cycle may be created when children from disadvantaged backgrounds are placed in low-performing schools, especially where there are low expectations of student performance. In terms of creating virtuous cycles, and improving equity matters, the solutions to these problems are multiple, complex and interdependent.

In barriers to equity for the teachers, funding again emerges as a key influence. But it is not simply the amount of funding available, but how, and where in the system that is used. The issues of 'where' relates to the age phase taught (pre-school, primary, secondary). For example, in New Zealand, government funding for Initial Teacher Education (ITE) is being reduced for teachers of young children. There are also specific inequities such as low achievement amongst Indigenous students, with inadequate teacher preparation and development (Canada, New Zealand and Australia). Differentials in funding in rural and urban areas are linked to problems with teacher supply and deployment (see case study for Zambia), with provision of schools, with access to schools (because buildings are not appropriate for children with physical disabilities), and with culturally

appropriate curricula (see case study for New Zealand) Where ITE and Continuing Professional Development (CPD) are identified as requiring more investment, there are specific areas for attention (as evidenced in the case studies) such as improving cultural knowledge and understanding of diversity, and enabling teachers to support children with disabilities and special educational needs. Whilst the data in this study indicate that these structures and conditions for inequity exist, it is much more challenging to understand the relative importance of characteristics (such as social class, ethnicity, gender, special educational needs), and how those intersect, in explaining educational under-achievement among specific groups of children.

2.3 The main inequities in education systems

Table 2.4 summarises main inequities, showing the equity issues identified in the survey, and the total number of occurrences in each of the main categories (socio-economic, cultural/ethnic, SEN, gender, rural/urban, general funding, government, achievement, and 'other'). The table does not imply a hierarchy as the respondents were not asked to list these items in terms of their importance. Whilst these equity issues have been categorised for the purpose of the analysis, one of the respondents commented that there are 'some very complicated policy questions here'. This comment is applicable across the categories, because many of these issues are inter-related, and cannot always be addressed via unions' influences on government policies. The responses indicated many culturally-sensitive issues. For example, the comment from the Poland union respondent about the influence of the Catholic Church on education indicates that faith-based influences on equity are perhaps less amenable to national or supra-national strategic solutions.

The categorisation in Table 2.4 indicates some overlap between the statements (e.g. inequities in SEN provision are attributed to resources, and to lack of teachers and/or specialist teachers). The highest number of statements about country-level inequities is for socio-economic and cultural/ethnic. This is consistent with the issues raised in the literature review: ethnicity, poverty and low socio-economic status are consistently associated (and often correlated) with poorer outcomes for children, for example in low levels of literacy, participation in education, age of leaving school, career and employment opportunities. However, other school-level factors are implicated, such as school choice, user fee systems, privatisation, and access to early childhood education.

The category of culture and ethnicity gives some indication of which minority groups are likely to be most disadvantaged, and which aspects of the education system are implicated in sustaining those disadvantages (teacher quality and supply, resources, curriculum, participation rates, school choice policies). In the section on SEN, the lack of support is strongly indicated (insufficient staff and insufficient specialist-trained staff) as are the limitations in resources and facilities. Gender remains an important area of general and specific equity issues, but is less frequently mentioned than the previous two categories. The country-specific case studies provide details of gender equity

Inequity	Statement (grouped thematically)	Nb
Cultural/ ethnic (including language)	<p>Students of all cultural ethnic backgrounds</p> <p>Cultural ethnic background</p> <p>The euro-centric nature of the NZ curriculum presents barriers to indigenous and other ethnic groups. Past school choice policies have disadvantaged the above groups</p> <p>Aboriginal education and funding. Access and outcomes for Indigenous students</p> <p>Issues of family background, especially for migrants. Ethnic and cultural background educational disadvantage for those from cultural minorities</p> <p>Discrimination against immigrant student. Discrimination of the Arab Sector. Children of immigrants coming from North Africa are finding it very difficult to integrate in our rigid educational system.</p> <p>Resources for immigrant children. Resources for immigrant families. Indigenous minority, The Traveller community, has unacceptably low levels of educational participation and achievement. Very complicated policy questions here. Traveller children</p> <p>English as a second language (support for). Francophones in minority setting. Policy for inter-culturalism is under-developed. All foreign national children are entitled to access to schools and 2-years English language support. No policy in place to ensure that the familiar pattern of under-achievement of migrant children does not occur.</p> <p>Francophone minority. Inadequate funding for supporting education of foreign national students</p>	20
SEN	<p>Special needs, learning disabilities, physical disabilities</p> <p>Special educational needs (supports for)</p> <p>Schools not suitable for students with learning disabilities</p> <p>Classes are too big - needs of students are not being met, especially those who have literacy or numeracy problems</p> <p>Schools do not have enough specialist staff - teaching and otherwise - to respond to problems presented by students - emotional and behavioural; learning disabilities; literacy and numeracy problems</p> <p>There is little provision for teachers to work with children with special needs</p> <p>Not enough teachers to help students with literacy and numeracy difficulties</p> <p>Not enough student support services to assist students with emotional and behavioural problems</p> <p>Inadequate funding for special needs services</p> <p>Resourcing for Students with disabilities/special needs</p>	16

issues for teachers and for children, and suggest that, whilst this is an area in which much progress has been made, further progress is needed. The issue of rural/urban inequities was indicated by developed and developing countries in relation to resourcing, teacher supply, and access to educational provision. This category intersects with the general funding and resource distribution categories, because of infrastructure and governance factors that operate at national and regional/state levels, such as teacher education, pay and conditions of service, as well as general lack of co-ordination between government departments. This last factor is significant in light of the issues raised in the literature review, namely that complex problems require co-ordinated solutions across several areas of government (such as health, housing, social welfare).

The category on achievement can be seen as reflecting some of the previous categories, but there are some specific indicators of what influences achievement (for example, access to libraries and ICT). This section also reflects the argument proposed by Milner (2010) that the achievement gap is part of a matrix of equity gaps in society's provision. As dimensions of diversity intersect, so do dimensions of inequity and inequality.

Table 2.4: The main inequities in countries' education systems

Inequity	Statement (grouped thematically)	Nb
Socio-economic	<ul style="list-style-type: none"> • Literacy and overall educational achievement levels closely related to income and class • Socio-economic background; social & economic disadvantage; social inequities; educational disadvantage from low-SES, poverty; divide between rich/poor; economical polarisation; social polarisation • User fee system; massive socio-economic inequality in the wider society. Massive disparities in income due to the user fee system (it is not clear whether this is school income) • Past school choice policies have disadvantaged those from low socio-economic backgrounds • Preliminary (elementary) school education from weak social groups 	22

Inequity	Statement (grouped thematically)	Nb
Gender	<ul style="list-style-type: none"> • Gender issues • The principles of gender equality are respected in the education sector; there are rare cases of discrimination on the grounds of gender in the education sector • Gender in the Jewish Ultra-orthodox sector • Imbalances in terms of teacher distribution in terms of gender • More Female teachers in urban areas • Strong gender stereotypes among population and educational system 	10
Rural/ Urban	<ul style="list-style-type: none"> • Rural areas are neglected • Funding and resources in urban/rural areas • Rural - urban inequities; urban versus rural • Lack of effective means of preventing discrepancies between geographical regions 	8
General funding	<ul style="list-style-type: none"> • Funding and resource distribution • Resources distribution is not balanced; inequitable distribution of resources between schools and systems • Inequitable public/private funding arrangements • Regional inequities • Low pay for teachers 	8
Government	<ul style="list-style-type: none"> • Education is seen in isolation to other issues • There is little cross-government department work to support education • No coordination within Departments • National/regional government • Lack of effective means of preventing discrepancies in infrastructure • Lack of appropriate education for teachers • Unequal working conditions in various types of educational institutions 	7

Inequity	Statement (grouped thematically)	Nb
Achievement	<ul style="list-style-type: none"> • The achievement gaps within and among groups can be very large (for example, urban/rural, race-ethnicity, gender, socioeconomic status, etc.) • Select policies for entry • Lack of appropriate education provided for pupils • Students not being able to graduate from school • School and centre communities are not always inclusive • Unfriendly infrastructure in schools (for staff and for children with disabilities) • Lack of/uneven access to ICT 'digital divide' • 16% rate of early school leaving (i.e. leaving school without school leaving qualification is unacceptably high) • Limited/uneven access to library facilities • Early childhood education (provision, access, quality, qualifications of workers all affect achievement) • Hunger (Canada, Ireland, Poland) and disease in the poorer schools (Zambia) 	12 (relates to multiple categories)
Others	<ul style="list-style-type: none"> • "social reproduction" • Bullying is a major problem in NZ schools. There is little understanding of human rights or children's rights in teacher education and/or in the contextual curriculum interpretations. • Promotions and appointments are political • There is inequity in Higher Education • Quality education for all • No long term planning • Traditional choices 	

The issues raised in this section relate to the concepts of vertical and horizontal equity identified by Brown (2006). Whilst equity goals indicate high aspirations, the responses here suggest specific areas need to be considered in terms of vertical equity: whose situation can and should be improved, and how that can be achieved.

2.4 Unions' influence on government actions

The ways in which unions influence government actions have been set out in Table 2.5, as given by the respondents, and indicate a combination of horizontal and vertical equity goals. The full responses have been included in order to provide a 'mirror image' of the main inequities, the specific country-level focus of unions' policy activities, and the various mechanisms through which they are able to influence policies via collective agreements, lobbying and advocacy, affiliated membership of other organisations, and industrial action.

Table 2.5: Unions' areas of influence on government policies

Country/ Union	Statement of influence on government
Ireland INTO	The INTO is in constant contact with the Department of Education regarding education issues, and has succeeded in having many educational issues included in the national partnership agreements over the years. Progress has been made slowly. For example, an additional 6,000 primary teachers were appointed in the last decade to support children with special educational needs in mainstream schools. The number of special needs assistants has increased from 2000 to 10,000 also over the last decade. The INTO also succeeded in increasing the number of EAL teachers in the system. However, because of recent cutbacks, numbers are being reduced again. (INTO)
Ireland ASTI	ASTI has always been a professional voice for teachers and the status of teachers' unions in Irish society is largely due to the public's identification of the advocacy role of the unions for a better and fairer education system. ASTI always takes part in public consultation processes, legislative processes, and negotiations in relation to education policy. Our core policy concerns are frequently reflected in both policy and legislation

Country/ Union	Statement of influence on government
Ireland/TUI	<p>Through union involvement a minimum level of additional resources are in place to meet the needs of those students for whom English is a second language. Some additional resources have flowed to schools in respect of special education needs (additional co-ordination with an allowance attached, improved psychological services, additional staff depending on nature and type of special need). Some specific professional development/in-service initiatives are in place. Additional teacher allocations and grants have been agreed for schools located in communities of significant economic and educational disadvantage. A new initiative has been agreed to improve access to ICT facilities.</p>
Australia/ AEU	<p>Significant improvements in learning outcomes for girls and pay/conditions for women teachers. While educational access and outcomes for Indigenous students remain a national problem, there have been improvements and the union has been a significant force behind them.</p>
Poland/ZNP	<p>The ZNP takes part in international actions such as Education for All and tries to involve the government in such initiatives. It co-creates educational policy and undertakes civic initiatives. The ZNP is a member of the Coalition for Equal Chances being an anti-discrimination group whose first meeting took place on 19th April 2010. ZNP has created an Equal Treatment Committee whose aim is to promote equity and improve anti-discrimination law valid in Poland via e.g. training courses provided for equal treatment experts (anti-discrimination law, equality in education, good practice examples, etc.). We prepare opinions, bills, legal regulations or protest letters addressed to the national authorities. The ZNP has been working on the code of conduct to improve status and legal protection of education workers and enhance professional and ethical responsibility towards pupils, colleagues and parents.</p>
Zambia/ ZNUT	<p>Equal pay for equal qualifications. Teachers with degrees, whether in primary or secondary education get the same salary. Salaries for both females and males teachers with same qualifications are the same. The emphasis on posting teachers in rural areas and the introduction of rural hardship allowance has encouraged teachers to go and work in rural areas. Introduction of re-entry policy for girls who get pregnant while in school.</p>

Country/ Union	Statement of influence on government
UK/ NASUWT	Examples of policy in respect of equity that have been the subject of recent focus have included barriers to access to leadership positions for black and minority ethnic teachers - the NASUWT has been involved in joint work with the National College, the body responsible for entry into and development within school leadership role in England. Other areas of recent attention have focused on the impact of far right racist and fascist organisations on the schools system, prejudice related bullying, the extent to which the curriculum and qualifications structure supports the promotion of equality and diversity and the impact of age discrimination on teachers and the education system generally.
Serbia/TUS	TUS is against closing of rural schools considering the negative influence for the access to education for rural children.
Israel/ ITU	Our union supports schools which integrate immigrant children and children of foreign workers. Also our union helps schools in the periphery and schools at the Arab sector.
Slovakia/ ZPŠaV NKOS	We are in contact with government and make social dialog with government.
Canada/CTF	Social advocacy and child poverty, aboriginal education, francophone in minority settings, numbers of teachers have increased despite declining enrolment. Increased funding for special needs. Collaboration on programs for francophone minority students. Increased attention given to child poverty/ resources for immigrant families by way of programs.
New Zealand/ NZEI & NZPPTA	<p>NZEI has successfully bargained for pay increases for our support staff members in schools. NZEI has successfully fought for the recognition of primary and ECE qualifications as equal to those of secondary school teachers.</p> <p>Development of non-sexist teaching resources; pressure to effect more inclusive educational policies; equal pay for women and men teachers and equal treatment in terms of conditions regardless of sex or marital status. (NZPPTA)</p>

Country/ Union	Statement of influence on government
Malta/ MUT	The Union has always taken industrial and/or legal action in cases of inequity. The MUT's insistence in this area has championed a method of drafting collective agreements which offer the same opportunities to all on all levels
Sweden/STU Läraryörbundet	Representations in governmental investigations.
Malaysia	<p>All children in Year One would be compulsory to attend school. Penalty imposed for parents that failed to enrolled child to schools.</p> <p>We have successfully advocated free textbooks for all children.</p> <p>We have lobby to the Government not to reduce the budget for the education sector especially aids for the poor children, i.e. cash assistance, clothing assistance, school and etc.</p> <p>We have advocated better facilities for all types of school.</p> <p>We have also lobby for better access for internet/ broadband including machinery schools, Tamil and Mandarin schools...facilities for all schools especially in rural schools</p>

2.5 Union policy in relation to aspects of equity

10 statements about equity were provided, and respondents were asked to rate their union's priorities. This analysis focuses on whether or not the statements are implemented in union policy and if so, the level of union priority.

General

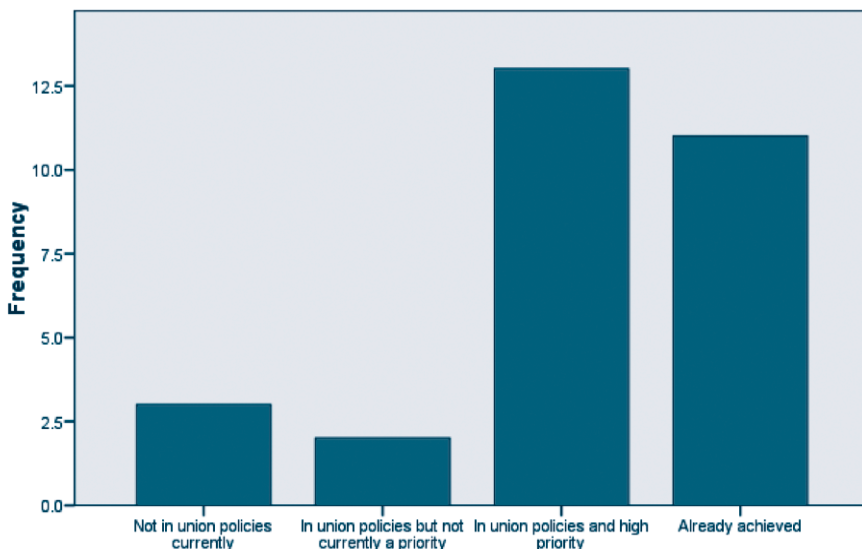
This section resulted in a wide range of responses, which reflected each country's progress towards equity goals and policies. Nevis said none of the statements were in union policy, commenting.

The union has not developed policies, per se, because we really do not have a problem. Public education is free to all citizens and non-citizens and private education is paid for but that is optional to parents.

Israel listed most statements as having been achieved, except 'Students with physical disabilities should be integrated into regular/ordinary classrooms' which it listed as a high priority.

There were two main patterns of response in the data. One is exemplified by the responses to ‘Students of all socio-economic backgrounds should have equal access to all phases of compulsory schooling’ (Table 2.6)

Table 2.6: Students of all socio-economic backgrounds should have equal access to all phases of compulsory schooling



The other six statements for which responses followed this pattern were related to equal access to all phases of education for boys and girls, and for all socio-economic groups; equity for teachers in terms of pay, status, and qualifications across all phases of education; the notion that compulsory schooling should be free for all. This pattern reflects unions’ views that this aspect of equity had already been achieved or was a high priority for them. Only a small number of unions (between 0 and 2) included it in their policy but saw this as a low priority. Those for whom it was ‘not in union policy currently’ may have regarded it as unimportant, or may have regarded it as a task that had already been completed. It is questionable whether such issues are ever ‘completed’, so it would be interesting to explore the reasoning behind omission in more depth.

The other pattern was common to two statements, both related to resourcing: equity in the distribution of resources between rural and urban areas (Table 2.7), and equity in resourcing for all phases of compulsory education (Table 2.8).

Table 2.7: Resources should be distributed equally between urban and rural areas

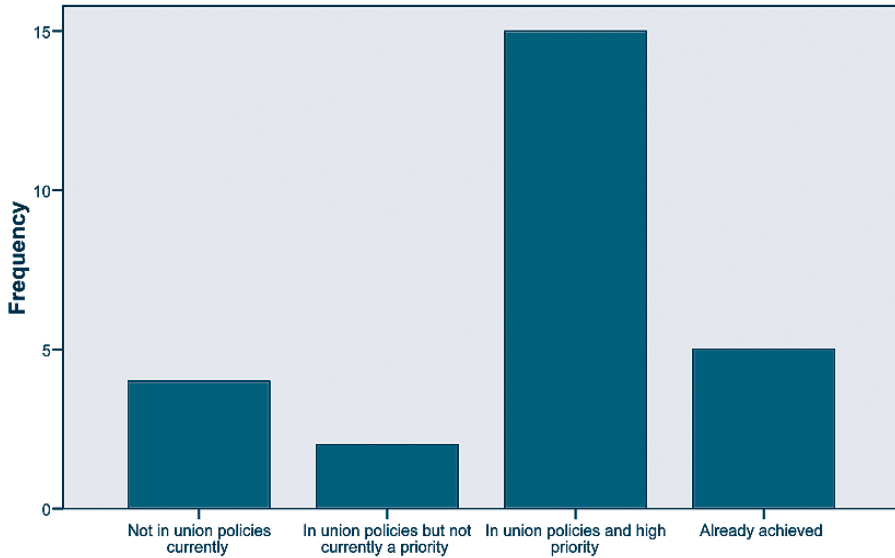
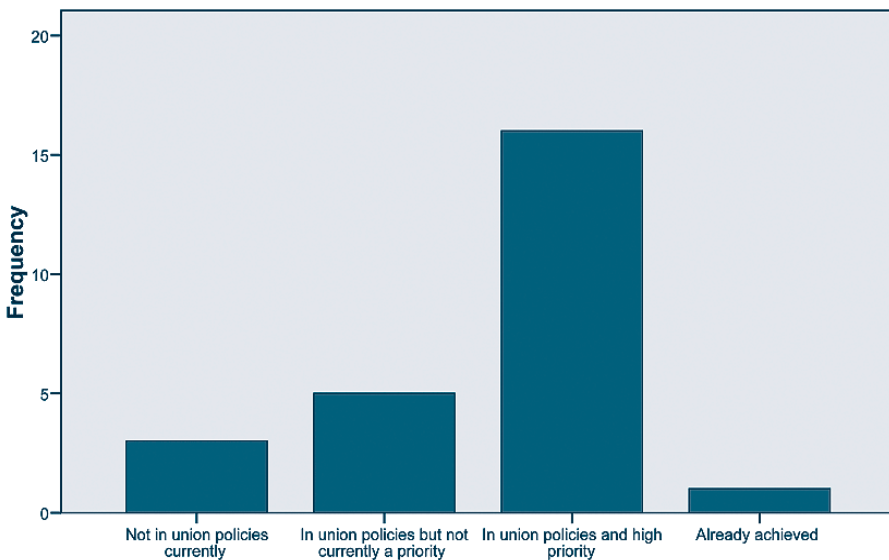


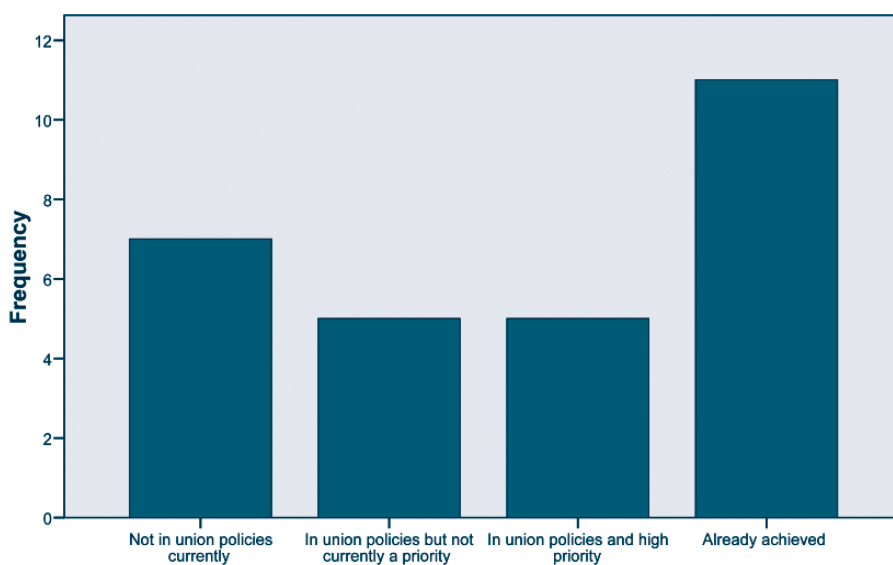
Table 2.8: All phases of compulsory schooling (e.g. pre school, primary, secondary) should be equally resourced.



The implication of this pattern of response may be that these were areas in which most unions are engaged in ongoing activity to address inequities which are perceived to be important. This is consistent with the findings from the survey questionnaire in which resources emerge as a key concern in achieving equity and quality.

The remaining issue was 'Students with physical disabilities should be integrated into regular/ordinary classrooms'. This did not seem to fit well into either of the patterns outlined above in Table 2.9. Unions' views on this matter seemed to differ considerably.

Table 2.9: Students with physical disabilities should be integrated into regular/ordinary classrooms



There is a statistical significance in the difference in the mean level of agreement between developed and developing countries for only 1 statement "*Students achieve poorer outcomes in rural schools because of the lack of educational resources*".

Developing countries tend to agree/agree strongly with the statement (mean= 2.70), and developed countries tend to disagree with the statement (mean= 1.62).

When a comparison of developed and developing countries is carried out, more respondents select that policies are 'in union policies and already achieved/ a high priority' in developed countries rather than developing ones. The latter are more likely to suggest they are in policy but not a priority. This may be explained by country-level factors which are explored in more detail in the case studies. At a broad level, countries in the majority (developing) world have more socio-economic problems, and more

inequities in their education systems which derive from their socio-cultural-historical trajectories. However, unions indicate increasing levels of activity with governments and non-governmental organisations to address these problems.

2.6 Implications for Education International's Goals and Policies

The final questions in the survey focused on the role that EI can play at national and international levels, in achieving or promoting equity goals. The statements include positive feedback on aspects of the work of EI that are considered to be valuable and successful. EI is seen as exerting influence through supra-national, international and national organisations. Because of this, the original statements have been included in full for further consideration by the EI team (Appendix 4).

Countries across the Human Development Index identify important roles for EI, from 'supporting countries which have not implemented actions against inequities', to helping countries to cope with new realities such as migration, trends towards privatisation, shifting ideological paradigms, and the impact of the economic crisis. Advocacy is a key area of influence, with respondents promoting the breadth of EI's role with governments, non-governmental organisations, and donor organisations, as well as unions. There is a bias towards upholding the value of public education systems, and of maintaining or increasing public funding. This perhaps reflects the fact that increased privatisation tends to erode teachers' professionalism, pay and conditions of service, as well as undermining public education. In addition, EI can extend activity in disseminating information to countries for international comparisons; articulating global goals; providing evidence of best practice; facilitating exchange and discussion.

EI clearly has key roles to play in helping countries to develop strategies for realising their own as well as international equity goals in education. Many of the responses in this section are aware of global trends and discourses, and the need to keep up to date with their implications for all aspects of education, especially those relating to equity. There are also concerns that global pressures will influence areas of trade-off in equity policies for teachers and for students. These are clearly broad challenges for EI, particularly as there are areas of progress in achieving equity, but with new threats emerging from the global financial crisis.

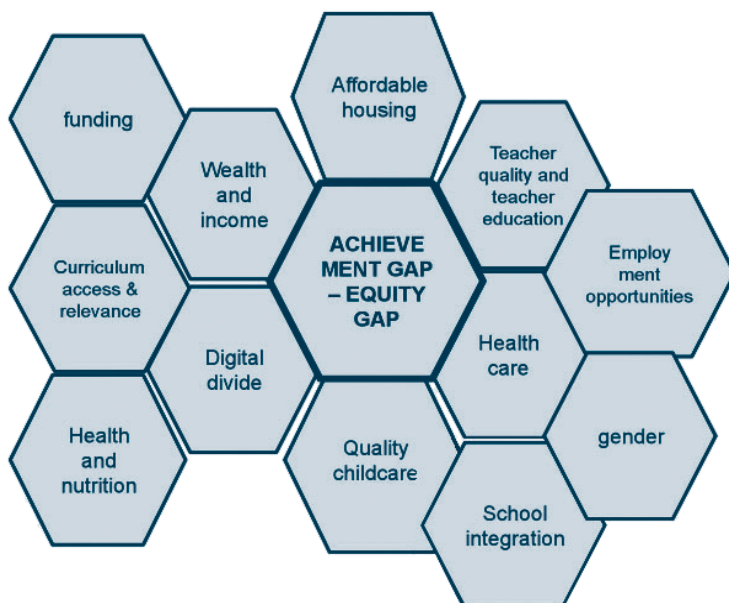
2.7 Summary

The analysis of the survey data has outlined some broad characteristics of inequity and inequality for teachers and for children, and identified some of the specific factors that cause or sustain these characteristics. There are contextual variations between the countries, relating to their position on the UN Human Development Index, and their specific trajectories of development. These variations help to explain the emphases in the responses. However, there are some similarities in country-specific issues which go across the HDI

criteria, such as rural/urban provision, gender inequities for teachers and children, general and specific areas of disadvantage, and the challenges of current global economic conditions. There is consistent agreement that issues of funding are central to improving equity and quality. There is a shared perspective that if funding is inequitable (or inadequate) then educational resources and provision will be inequitable, and will lead to poor quality, and inequitable outcomes. However, the relationship between funding and outcomes does not seem to operate in such a linear way, as evidenced in OECD reports (McGaw, 2008). The key issue seems to be not simply more funding, but better targeted funding in areas where it is likely to be beneficial and effective. The findings also portray the strategies and mechanisms that unions use to work with and influence government policies.

However, it is at government level that the barriers to equity can mainly be identified, not least because of the range of achievement gaps identified by Milner (2010). Figure 2.10 uses Milner's concepts to illustrate how the achievement gap can also be perceived as the equity gap.

Figure 2.10 Milner (2010) the achievement gap and the equity gap



This illustration underscores the points made by many of the unions in this chapter – that the education sector alone cannot solve all the problems of society, and that equity issues need to be addressed in different areas of social and economic policy in order to have sustained impact. These issues are examined in greater depth in Chapter 3: the country-specific case studies.

CHAPTER 3

Country-Specific Case Studies

3.1 Case Study Design

The case study questions were informed by the analysis of the country-wide and country-specific survey data. The questions were divided into two sections: generic and country-specific. The aim was to enable in-depth exploration of generic issues, and country-specific issues, in order to capture variations in policies and practices, and trajectories of development with regard to equity matters. Each of the case studies draws on responses to the survey, and to the case study questions, and any additional documents sent by the respondents to clarify country-level issues.

Not all the respondents followed the case study questions as they were set out in the email and attachment. However, most countries provided sufficient details to develop the cases either through additional documents and reports, or through links to their websites. Where these have been used to deepen the analysis, or exemplify key issues, their references are included in the text. In two countries (New Zealand and Ireland) more than one union was included in the case study, because they responded to the survey. As is common in many countries, the unions in these two countries represent teachers in different phases of education, and teachers have a choice of union affiliation. These two countries also provided the most detail, which has contributed to the depth and length of their case studies.

Case study countries

- ◆ CANADA
- ◆ NEW ZEALAND
- ◆ ENGLAND
- ◆ IRELAND
- ◆ POLAND
- ◆ ZAMBIA

3.2 CANADA

Canadian Teachers' Federation (CTF)

Founded in 1920, the Canadian Teachers' Federation (CTF) is a national alliance of provincial and territorial teacher organizations that represent nearly 200,000 elementary and secondary school teachers across Canada. For background information on CTF, their website is: www.ctf-fce.ca

The CTF policy on equity is as follows:

CTF, as an instrument of the teaching profession, has a responsibility to advocate and pursue the implementation of policies designed to alleviate economic and social inequalities, insofar as they are related to education. CTF representatives to local, provincial/territorial, national and international meetings and conferences have the responsibility to put forth the concept of equality in educational systems, and to model the principles of equity in their practices.

Equity is regarded as an intrinsic feature of the quality of education 'to a great extent' in Canada. The most important issues in the union's policies for children were to enable everyone to have an equal opportunity regardless of background, specifically: funding rural/urban; aboriginal funding; divide between rich and poor; francophone minority; resources for immigrant families; more equal spread of resources and funding. The following issues were identified as the most important in the union's policies for teachers, because:

Everyone has equal opportunity, regardless of where they live. All should have acceptable working conditions to operate in. All should be paid according to fair process without favouritism.

The union's policies have impacted on government actions in the following areas:

- Social advocacy and child poverty; aboriginal education; francophone in minority settings.
- Numbers of teachers have increased despite declining enrolment.
- Increased funding for special needs.
- Collaboration on programs for francophone minority students.
- Increased attention given to child poverty/resources for immigrant families by way of programs.

The three main goals identified to achieve equity included adequate funding, human resources, material resources. One of the barriers to achieving equity for students is that some areas of the country have access to more funding and resources than others. The 'best example' was given as the underfunding of Indigenous students. For example, the Assembly of First Nations of Canada estimate that the average expenditure in education for each Aboriginal child compared to those students in the public system is between \$2000 - \$3000 less per child per year. With regard to rural/urban funding, rural schools are generally smaller, with fewer opportunities for programme and curriculum choice; residents generally earn less which reduces fund-raising capacity, and students have less access to community resources such as public libraries, museums and health professionals.

The respondent identified a widening divide between the rich and the poor in Canada. The following reasons were given for the ways in which this is influencing equity for teachers and for children. In households and communities where there is low SES there are fewer reading resources at home, a greater need for school breakfast and lunch provision. These factors impact on virtuous or negative cycles because 'Research shows that kids who have the home supports and encouragement, adequate school resources and full tummies simply do better in school'.

With reference to a lack of funding and resources, and an unequal spread of resources, a number of factors influence equity for teachers and for children, and impact on the quality of education. For example, funding for public education has dropped consistently in the last 20 years, so that Canada is now below the OECD average. The ageing population, and attendant increase in health costs, will continue to challenge this fraction of expense for public K-12 education.

The policies that promote equity in society, and advance equitable conditions of service for teachers include:

- Teachers are paid according to qualifications and experience.
- Policies against homophobia, racism and sexism.
- There are policies that encourage the hiring of minorities where qualifications are "equal".

Curriculum and program policy development are seen as effective ways of achieving equity goals. Some of the main advances or achievements in equity for students in the last five years include:

- Inclusionary practices for students with special educational needs

- Increased curriculum, resource, and program supports for BGLT (Bisexual, Gay, Lesbian, Transgender) students and teachers
- Canada continues to make strides in “resiliency”, students who perform at least average despite SES background
- Canada does well in achieving success in immigrant students
- We have made some advances in addressing our major issue, that of support for Aboriginal students, but we still have a long way to go in this category.

The CTF policy on inclusion is as follows:

- A caring society provides education for all children.
- Integration of students with special needs should ensure the rights of all children to an education, and an equitable distribution of resources among all students.
- Students with special physical, intellectual or emotional needs benefit from learning in the most enabling environment, provided that environment has been adapted to meet their special needs.
- While regular classroom placement should be the goal of integration, it should not necessarily be assumed to be the only or best placement option for all students at every stage of their education.

The CTF has recently started using international comparative data as a means for considering equity and quality in Canada’s education system in the following ways.

...as more and more policy is driven by TALIS and PISA we find ourselves using data from these sources that the media generally ignores in making our points. Governments use test data to compare schools in efforts to better direct resources.

With budgets being slashed to address deficits, there is less funding for equity goals in education teachers and/or for children. For example, the Nova Scotia Government is calling for a 20% + cut in the Department of Education budget, which would mean a substantial cut in teacher positions alone.

All country respondents identified a lack of equity for disadvantaged groups in their societies. In Canada, there are incentives to recruit from minority groups, including Aboriginal teachers (where qualified), Francophone minority language teachers, and immigrants. Professional and curriculum development are available to support teachers to work with minority groups. Resource allocation was a problem because of variations in funding at provincial and territorial levels. Schools in high SES areas augment funds through

fund-raising, whilst schools in impoverished areas and northern schools do not have that luxury. The main equity issues for teachers' employment and careers are:

The growing threat, coming from international efforts (just arriving in Canada), of conservative fundamentalist arguments for tying teacher tenure and compensation to their students' outcomes on narrow standardized tests.

The CTF identified areas in which EI could help the country to achieve its goals at national and international levels: accessing and disseminating the best information for comparative purposes; use the media - frame the message in a way that the media cannot ignore.

Commentary

The key themes that emerge from this case study are funding, resources and socio-cultural diversity. Funding cuts may sustain inequities, as indicated in the differential in funding between the Aboriginal children compared to those in the public system, and the reduced capacity of schools in areas of low SES to raise additional funds. In common with other countries, it is not just a lack of funding and resources, but an unequal spread of resources that impact on vulnerable communities. Canada, like New Zealand, is below the OECD average for the proportion of Gross Domestic Product spent on education. Therefore addressing equity gaps may remain problematic in the face of funding cuts, and the privatization agenda.

The areas identified for cuts in funding are likely to impact on those communities that are already disadvantaged, because they are less likely to be able to compensate for the lack of additional support and services. Teachers also bear the effects of these cuts through larger class sizes, and a reduction in human and material resources. That these cuts are happening in a very highly developed country such as Canada (as in other HDI countries) is testament to the extent of the economic downturn, and the ways in which this is impacting on equity and quality in education (and perhaps ultimately on education as a driver for social justice).

The issue of socio-cultural diversity is significant in a country that has long-established patterns of migration, as well as a large Indigenous population. However the concept of 'diversity' can be used in a way that masks diversities within groups that may be seen as homogenous because of their identification as, for example, Indigenous, Aboriginal, Travellers. Aboriginal groups in Canada differ in their histories, culture, economic contexts, and life-style choices. They live in urban and rural contexts, some very remote, and include the following: those on reserves (sometimes referred to as First Nations

or Indian Bands), others from that group not on reserves, Inuit communities in the north, and Métis communities. As in other countries that have identified significant equity issues with Indigenous communities, it is important not to group them (or any other minority communities) together without acknowledging variations in their socio-cultural and historical contexts. This underscores the concept of diversities within diversity.

It is also interesting to note that children from some immigrant communities do well in Canada. In terms of understanding structural influences on equity, it might be useful to understand why children from some groups succeed better than others, and what implications that might have for understanding home, community and school factors in their experiences and outcomes. Such factors are often masked by macro-level international league tables, so within- and between-country comparisons of such micro-level data might be a useful way of understanding human agency in ameliorating disadvantage.

As with other respondents, the barriers to achieving equity goals in the union's policies are highly dependent on government policies and priorities. This suggests that processes of trading-up to combine horizontal and vertical equity goals, and to improve quality, are difficult to sustain in the current funding and political environment.

3.3 NEW ZEALAND

New Zealand Education Institute (NZEI) Te Riu Roa

New Zealand Post-Primary Teachers' Association (NZPPTA)

NZEI is a professional and industrial organization that represents the interests and issues of around 50,000 members, including teachers in the early childhood and primary sectors, and education support workers. NZEI supports the promotion in education of partnership, participation and protection under Te Tiriti o Waitangi to enhance Māori aspirations. Their website is www.nzei.org.nz

The New Zealand Post Primary Teachers' Association/Te Wehengarua (PPTA) is the professional association of the post-primary teaching profession. For more than 50 years PPTA members have worked in schools and nationally to ensure all young people in New Zealand have equitable access to good quality state education. The PPTA represents teachers and principals in secondary and area schools, and teachers in intermediates, technicraft centres, and community education. The website is www.ppta.org.nz

Detailed responses were provided to the case study questions by the respondents for

both NZEI and NZPPTA. These responses were analysed for key themes, with illustrative statements provided for each theme. Inevitably there is some overlap between the themes (for example, inadequate funding for ITE and CPD programmes impacts on specialist training to work with children in the Indigenous communities). However, this analysis provides an overview of current trends, as well as examples of success and further challenge for the unions.

Funding and resourcing

Consistent with the findings from the survey questionnaire, funding and resourcing underpin equity matters for teachers and for children. The pay gap (between sectors and between male and female teachers) is identified by both unions (also discussed under CoS). Financial barriers to closing this pay gap for teachers (and for support staff and support workers) included reductions in the overall budget and:

- Refusal of the government to implement the outcomes of a pay review.
- Absence of any legal support or obligations for good employer practices and anti-discrimination polices.

There is some flexibility at school level in how resources are deployed. However, head teachers can make their own decisions about resourcing, for example, some may choose to run 'overly large classes (New Entrants classes of 30), which is within regulations, but not good practice' (NZEI).

As in other countries, the effects of the economic crisis are being felt, along with trends towards performance management. Whilst resource allocation is currently based on needs, the new policy is that 'money follows success', which indicates a shift to a culture of performativity whereby the government will use testing and national standards to measure educational achievement and teacher quality. These issues were identified by both unions. The NZEI stated that this will lead to an emphasis on outcomes, particularly implementing and achieving national standards, which may not include time for other areas of the curriculum such as the creative arts and social justice issues. The PPTA indicated that teacher performance and performance pay measures have been steadfastly resisted by teachers and their unions.

Conditions of Service

Closing the pay gap was identified as an equity issue by NZEI, and by PPTA, regarding the gender disadvantage for women teachers and principals. Although pay parity between primary and early childhood teachers was achieved in 2002, some disparities remain. There are specific inequities across the sectors, with the exception of the kindergarten sector. This is because less than 1% of teachers in this sector are male. However, in the primary sector, men are more likely than women to hold positions of responsibility or management:

While men make up only 15% of the primary teaching workforce, over 48% of principals are male. One in four men is a principal, compared to 1 in 8 women. In a further breakdown of schools, men are three times as likely as women to be principals in larger, high decile, urban primary schools, thereby attracting higher salary and additional prestige. (NZEI)

Therefore the pay gap is not so much at the level of starting salaries, but opens up with subsequent units of responsibility and promotions. There are also pay gaps for support staff and support workers, who are represented by NZEI. In addition, pay parity between primary and secondary teachers means that any salary gains must be applied across the sectors, and thereby increase the overall budget.

New Zealand has a system of collective bargaining, but it seems that agreements are not being implemented. For example, in 2009, the National Government disbanded the pay equity unit and moved that all recommended pay investigations would not occur, and recommendations from pay investigations would not be honored. This meant that even though the gaps were recognised nothing could be done to close them, and there is no agency to centralize the information or monitor the results of the completed recommendations.

One of the main equity issues for the NZEI was that while teachers are centrally funded and salaries are determined through collective bargaining, each school board of trustees makes its own employment decisions, particularly where principalships are concerned. These decisions are not nationally aggregated or monitored for any bias. Boards have little if any EEO or human rights training and will often rely on stereotypical gendered views when making a decision. Equally principals, while they are trained teachers, do not always have school management training and often have little understanding of EEO principles. Principals will generally have the final say over professional development and acting-up opportunities. Often the discrimination is unintentional, but it is discrimination all the same.

The PPTA respondent echoed the previous comments from the NZEI, and identified other conditions of service priorities:

- The possible unjustified use of fixed-term (non-tenured) employment and the inequitable provision of classroom release or non-contact time for part-time teachers as significant high priority concerns.
- Inequitable provision of domestic and sick leave provisions (related to tenure).
- Barriers to women teachers to contribute to, influence or advise on in-school and system level policy issues, and awareness of, and training in, practices to prevent bullying, harassment and discrimination.

Some advances have been achieved as a result of the 2007 Collective Agreement negotiations, including:

- recognition of absences for childcare as service for the purposes of sabbatical leave applications,
- 100 teacher relief days for Māori teachers responsible for organizing the national biennial Kapa Haka contests,
- two days paid leave for teachers to attend their partner at the birth of their child,
- the introduction of limited non-contact for permanent part-time teachers with a teaching load of 0.5 and above.

Initial Teacher Education (ITE) / Continuing Professional Development (CPD)

The NZEI response indicates that much progress has been made with the early childhood education (ECE) curriculum, but there remain issues with equity in ITE/CPD programmes. The following comments link CPD with improving equity for a range of minority groups:

With regard to other minority groups, and in particular ESOL and refugee and migrant learners, although there is scope for anti-bias values education within the curriculum, there is little if any inclusion of these issues in most ITE programmes. Also this year the government has decided that all professional development and learning will target teaching the National Standards. There is little scope for inclusive or human rights education in schools. The ECE curriculum is more inclusive in general, but there is little opportunity for teacher education in these areas. Refugee and migrant education issues are not generally considered. Although there are schools

in some centres with exemplary practice in this area, there are not many resources available to enable accessing the curriculum. The education system is heteronormative and there is a prevalence of homophobic bullying.

Teacher education issues were also indicated by PPTA in relation to additional training to support social and cultural diversity and to reflect the cultures of migrant and Indigenous communities.

Tail of educational disadvantage/underachievement

'Quality Early Childhood Education' is seen as a way of lifting the tail of underachievement (NZEI), but with concerns about the numbers of qualified ECE teachers in these settings. However, a policy tension is that the shift of government funding to 'tertiary pathways' is leading to the reduction in ECE faculty in some universities.

The NZEI respondent noted that 'Success in education must be supported by children living in healthy and safe environments: sadly this is increasingly not the case in New Zealand'. This comment indicates that, even those countries identified as 'very highly developed' in the Human Development Index have pockets of high poverty and low achievement. The PPTA respondent also noted that an appropriate cultural approach has to be supported by considerable investment in time and people and resource development, and described the links between funding, quality and equity outcomes:

Schools in better resourced communities fare better in this respect than those in low socio-economic areas and Māori and Pacific Island communities, even during the current global crisis. The disparities that result are visually apparent from a simple drive by, and are also evident in the tail of educational underachievement as indicated in PISA and national achievement data.

The NZEI respondent considered that equity is not, in reality, regarded as an intrinsic feature of the quality of education. However, it is a strong feature of the unions' policy. A similar comment was made by PPTA: 'More tends to be heard in rhetoric than is seen in action'.

Curriculum

The curriculum is bi-cultural and children may access the curriculum through Te Reo immersion or bi-lingual classes. The success of the ECE curriculum has led to demands for a similar language and cultural approach in primary and secondary sectors, which is a significant challenge to current and historical policy contexts. However, despite



its success the ECE curriculum, Te Whāriki, is under threat due to funding and staffing issues.

There have been historical tendencies for the New Zealand curriculum to be 'Eurocentric', which reflects patterns of human migration, and the historical spread of ideas from the west. However, new patterns of migration and settlement require changes in curriculum design and content, in order to achieve cultural relevance as a means of ensuring equity. In secondary education, some Māori-based curriculum resources are available, but teachers are largely responsible for developing their own. The PPTA respondent indicated that changes to curriculum and assessment practices were seen as being more equitable for secondary students:

At a general level for students at secondary level, the abandonment of norm-referenced, national examinations and their replacement with standards-based assessments (unit and achievement standards) has allowed for the development of curriculum and learning options that are more suited to the diversity of the student population, more relevant to modern learning needs and more equitable in terms of status of the assessed learning outcomes at the end of compulsory schooling. This transition has taken place over the last decade.

However, whilst these changes were 'far-reaching', they were poorly planned and resourced, and risked foundering without the support from teachers and their union. This comment illustrates the fact that curriculum reform is, by itself, likely to have limited impact without support for teachers, and support by teachers.

Discrimination – equity issues (gender, ethnicity, sexualities etc)

The NZEI respondent identified the following equity issues as problematic for students:

There is increasing awareness of the impact of bullying, particularly homophobic bullying, and schools are trying to safeguard students. Unfortunately cyber bullying and child and young person suicide are increasing. NZ has the highest rates for this tragic occurrence in the OECD.

There is no human rights education (as such) in NZ schools, although there is an opportunity to include human rights education in the curriculum. Children and young adults learn about human rights violations in other countries, but nothing about their own rights as citizens in NZ and the world.

NZ schools may not be the safest environment for children who are 'othered' for whatever reason - sexuality, disability etc.

Schools in NZ are generally small; for the most part they do not model equitable societies. On the other hand NZ might not be an equitable society as we have the third largest income gap in the OECD countries and an increasing number of children (over 30%) are living in hardship or extreme hardship.

The PPTA respondent also identified specific inequities for the Māori and Pacific island communities, and advanced a number of strategies to increase cultural appropriateness of the curriculum, and to support inclusive practices:

While Māori is an official language in New Zealand there are insufficient numbers of fluent speakers trained as teachers. That needs to be addressed to enable Māori-medium education to become more widely available.

Equally, while a Māori curriculum has been developed within the formal NZ Curriculum the lack of teachers, resources and professional development hampers implementation and effectiveness.

Resources and capacity in the significant Pacific Island languages and cultures are scarce at best.

Confidence in and respect for one's language and culture, and confirmation of that through ongoing learning experiences, leads to much improved outcomes and significantly higher achievement rates for the students involved when compared with those whose educational experience is almost solely mainstream.

Concerns with language and culture are also important for teachers who are Māori or Pacific Island. This is because recognition and respect for their social status, prestige and cultural identity are integral to the concept of māna. The underlying value of māna is significant in terms of their confidence as effective teachers.

These strategies have implications for funding and resourcing, as well as for ITE/CPD provision. Achieving equity goals, and improving quality, are resource-hungry. As the PPTA respondent indicates where special projects have been funded, these have resulted in improving the experiences and outcomes for Māori in mainstream schools where the majority are excluded. However, reduced funding and support lead to reduced quality of the programmes, leading to 'cartoon versions'.

Some equity funding is provided on a contestable or project-based basis. The total is regarded as insufficient and schools seek to make up for shortfalls from locally raised funds, voluntary levies and foreign-fee paying students.

The PPTA respondent identifies some positive advances which impact on culture and diversity:

The Kapa Haka provision [for teachers] is also seen as an equity advance for Māori students for whom engagement in Kapa Haka is a significant language and cultural experience.

Those students lucky enough to be part of a specific initiative, programme or trial may have benefitted briefly but...such initiatives are not universal, nor enduring.

Special Educational Needs

The NZEI indicated areas of potential progress for children with SEN in the context of ITE programmes:

This year the Teachers' Council has emphasised the need for ITE programmes to include special needs education theory and experience. The government has also made this a priority. We have yet to see how this work will be realised in practice as there are already comments from university ITE providers that the costs of these and other changes make delivering ITE prohibitive.

In addition, general issues of funding and resourcing impact on provision for children with SEN.

Human Rights

In the Survey, the NZEI respondent made several references to human rights issues, and acknowledges that this is an area of personal interest: 'understanding of human rights and equity principles that underpin NZ society, particularly the Treaty of Waitangi'; 'learners' awareness of their own and others' place and rights'. These issues were developed in more detail in the case study, and in additional documents sent by the respondent. Human rights, and children's rights, feature strongly in NZEI policy, and in their policy advice to pressure groups and government organizations. The issues raised under this theme were related to discrimination, and the tail of underachievement.

There is no human rights education (as such) in NZ schools – although there is an opportunity to include human rights education in the curriculum. Children and young adults learn about human rights violations in other countries, but nothing about their own rights as citizens in NZ and the world.

There are few opportunities for EEO or human rights training (for the schools' boards of trustees), and the focus on literacy and numeracy is likely to impact on the scope for providing human rights education for children.

Commentary

Within the overall analysis, (as in the other case studies) there is a matrix of equity issues for teachers and for children, which are interdependent. Two key issues emerge from the NZ case study: the ongoing efforts to improve educational provision for children in the main Indigenous communities – Māori and Pacific Islands; and efforts to improve teacher education and conditions of service. The reasons for the first theme are clear: children from these communities are most likely to be 'over-represented' in low-SES households, and most likely to attend publicly-funded schools at primary and secondary levels. Several areas of progress were noted by both unions in this regard. The NZEI respondent highlighted the many benefits of the bi-cultural Early Childhood framework (Te Whāriki), and seems to have enjoyed acceptance and success. The PPTA respondent also indicated the significant improvement in students' achievement and engagement in formal education where the medium of instruction and the curriculum is language and culture based, and where students seem to be benefiting from special projects. In relation to the second issue, in common with other countries, efforts to improve teacher education and conditions of service are integral to efforts to improve educational outcomes for children. There are clear indications of areas where teacher training needs to improve, especially with regard to children from the Māori and Pacifica islands communities, and for children with special educational needs.

The pace and direction of changes in the curriculum, in conditions of service, and in performativity are similar to those in England, Ireland, Canada, Australia, and the USA. These countries are all 'Very High Developed' on the HDI, (See Appendix 1) but all identify concerns with neo-liberal or neo-conservative agendas regarding public sector reform, and specific changes to education (linking teacher pay and performance via pupils' outcomes, narrowing of the curriculum, testing arrangements, privatisation of public services). Like New Zealand, Australia and Canada have large Indigenous populations, and data from these countries indicates similar equity issues for children. These in turn make complex demands on teachers' professional knowledge and expertise. Whilst the unions argue for more resources for minority groups in particular, there are also calls for better targeted resources for children and for teachers (for example ITE and CPD training, financial incentives, culturally appropriate training and curriculum development).

Comparative data are used in New Zealand from OECD and EI, but because of proximity and jurisdiction comparability, close comparisons with Australia are more frequent, followed by UK and Canada, largely because of the migration of teachers to and from those countries.

Although both respondents identified a range of equity matters for children and for teachers, the NZEI respondent ended on a positive note:

...times are hard and there is little if any government will to advance equity issues in education, either for teachers or for children. Having said that I've been in this particular battle for some time and I think it's a winnable one, but I do believe it will take legislative support or unions to win.

3.4 IRELAND

Teachers' Union of Ireland (TUI); Irish National Teachers' Organisation (INTO); Association for Secondary Teachers Ireland (ASTI)

Three teachers' unions responded to the survey and case study: the Teachers' Union of Ireland (TUI), the Irish National Teachers' Organisation (INTO), and the Association for Secondary Teachers Ireland (ASTI). Their representatives provided detailed responses to the case study questions regarding equity for teachers and for children. Their responses provide an overview of the nature of government and unions' policies with regard to equity matters, and, at the same time, indicate the threats to further progress that have arisen because of the economic crisis in Ireland, and the subsequent 'austerity measures'. As in other countries, the equity issues are both general and relative. The Irish state has specific policies for promoting equity in education for the Indigenous community – the Traveller (nomadic community), and for children with special and additional needs. In common with the case studies for Canada and New Zealand, the Indigenous community emerges as experiencing both general and relative inequities.

The unions' statements on equity are as follows:

TUI policy on equity includes fair and transparent selection procedures for entry to second level schools requiring all schools to enrol a mix of students in accordance with the local demographic profile; disability/special needs, ethnic minorities, socio-economic profile etc; additional resources (staff, grants, facilities) to ensure schools can meet the needs of particular and special interest groups within mainstream settings; special educational needs; ethnic minorities; those for whom English is a second language; additional weightings for schools, teacher numbers, grants; supports for schools in areas of high socio economic disadvantage.

TUI promotes the interests of education and to support the concept of equal access to full education for all children and to strive for the raising of educational standards. INTO

ASTI has no formal statement as such on equity in general. ASTI has a strong reputation for being to the forefront in various advocacy and lobbying campaigns for greater equity in education policy. Our motivation for such campaigns has been driven by policy adopted at our annual conference which in turn reflects the views of the educators. The rationale therefore for support for equity campaigns is ethical.

The main equity issues for teachers

Schools do not have enough specialist staff; class sizes are too big so the needs of students are not being met; the policy for inter-culturalism is under-developed; there is no policy to ensure that the familiar pattern of migrant children does not occur; teacher allocation is internally linked to capacity of a school to offer wider subject, curriculum choice and provide additional supports and services according to student needs; pension issues for new teachers; pay and pensions; CPD for specific age/minority groups.

The main equity issues for students

Social and economic disadvantage, special needs, early childhood education; social class – literacy and overall achievement levels are closely related to income and class; emotional and behavioural problems; learning disabilities; 16% rate of early school leaving; weighting of resources; the digital divide (those who do/do not have access to ICT at home and/or in schools).

There are specific equity issues regarding early childhood education include funding, training and employment of teachers. Ireland is among a very small number of countries that lack a fully established early education service. Notwithstanding some efforts in this regard in the past 10+ years access is limited, restricted and very varied. Given evidence that effective early education gives children a head start in terms of educational development, increased investment is essential to maintain quality, and ensure an up to date service. There have been no cutbacks in services for children under five in terms of education. The free pre-school scheme will continue according to the budget. Provision for three year olds is in the private community and voluntary sector where the level of qualifications required by the staff is pitched at Level 5 on the qualifications framework, which is the equivalent of one year post-second level school. The INTO has expressed concern that this level has been pitched too low. Children of four and five who attend primary schools are taught by qualified primary school teachers who are graduates.

The INTO respondent proposed three areas for development in this sector to improve equity and quality:

- Enhance the level of qualification required of staff in the pre-school sector (three to four year olds) from Level 5 to graduate level for the leaders and a minimum of Level 5 qualification for support staff.
- Infant classes in primary schools need to be fully equipped and resourced to provide a play based curriculum which is age appropriate.
- CPD is required for teachers in the infant classrooms (ages 4-6) in order to ensure that the most up-to-date methodologies and approaches to learning for the particular age group are employed.

Investment and Resource Allocation

As noted by the TUI inadequate investment in education has many impacts and in this regard teacher numbers, teacher allocations and teacher expertise are interrelated equity matters. In some areas, progress that has been made is being halted or reversed due to reduced resource allocation to education and related services (such as support for Traveller education, and for special educational needs). Potential areas where reduced resource allocation might influence equity for children include:

Additional supports for children with learning disabilities and children with learning difficulties. The abolition of teaching positions of Visiting Teachers for Travellers (VTT) and the Resource Teachers for Travellers (RTT). In future, support for this group will be provided by 'learning support teachers', whose services can be applied for under the General Allocation System. Travellers are considered to be the most marginalised group in the country.

The TUI response indicates that it is a government policy to integrate those with special needs and members of the Travelling community into mainstream education. This has led, or will lead, to the closure of special schools and centres. The difficulty is not so much in these closures but in the fact that sufficient additional funding is not being made available to mainstream schools to support integration (TUI). While there are some enhanced allocations this is insufficient to truly promote equity of access and outcome for many students. Some schools, because of population mix, are unable to draw on any additional finances from private family contributions. Further enhancement of capitation grants is necessary to enable such schools to develop their supports and services to students in a manner that ensures greater equity, for example library services, additional in-school activities, and out of school activities. Additional resources are needed for support services such as educational psychologists, secretarial, support staff (especially for language and SEN) and classroom assistants.

The ASTI response concurs with these views:

The austerity measures brought in so far have raised class sizes, eliminated categories of specialist teachers... The capacity of schools to meet needs is very significantly constrained. ASTI has conducted in-depth qualitative research which shows that schools are not able to provide teacher-intensive, small group programmes for SEN students and students at risk of early school leaving. The official line from the Government for all public sector workers is "doing more with less".



The INTO respondent highlighted the importance of sustainability of initiatives:

Intervention programmes need to be sustained over time if progress is to be maintained. There is sometimes an assumption that if a child is doing fine, supports can be removed. However, the child is usually doing fine because the supports are there. Teachers' influence on pupils' learning is significant, therefore, there is a need to be constantly investing in ensuring that teachers remain motivated and up-skilled and informed of developments in education, teaching and learning, so that they can enhance educational outcomes for an increasingly diverse pupil population. Schools alone cannot compensate for difficult social and economic circumstances, therefore, family and community supports are also required if educational outcomes for disadvantaged children are to be improved.

Access to education

The Traveller community in Ireland has unacceptably low levels of educational participation and achievement. This is consistent with findings from other countries regarding Gypsy Roma Traveller (GRT) communities. However, it is clear that some strategies combine to sustain inequities for this minority group. A government survey found that 'some schools use all kinds of restrictive admission policies to exclude Travellers, those with special needs, the children of immigrants and low achievers'. However, the policy issues here are 'very complicated'; it is evident from the responses that funding to this community is being reduced, in spite of these equity issues, and in spite of the unions calling for additional resources, as the TUI respondent noted:

In practice, schools, especially those under private management and publicly funded, are able to frame general admissions policies that espouse equality of access but enable them to select certain students out.

These factors indicate some of the structural barriers to equity, and the ways in which these are being reinforced by government and school-level policies.

Public-private – the 'mixed economy' of provision and funding

The TUI response on this matter gives a detailed account of what policies are in operation, and the effects these have on equity in the education system, via funding mechanisms, school choice and selection procedures, admission and participation. As such, the response provides some insights into the tensions, and slippage, between policy and practice. In Ireland, each school is legally required to publish a policy concerning admission and participation for students with disabilities or special needs, and also advocates the principles

of equality and right of parents to send their children to a school of their choice. In practice this legislation is useful, but is a far cry away from what is actually necessary to bring about a more equitable system. A commitment to real equity or a substantial move in that direction is not explicit in national policy documents.

An audit by the Department of Education and Science on school enrolment practices in post-primary in 2008/2009 found that particular types of students (special needs, newcomers, those from low socio-economic backgrounds) were concentrated in certain schools within certain catchment areas due to some schools using restrictive admissions practices. However, this equity issue was not being addressed at government level. Instead schools are allowed to administer selection criteria such as: whether a sibling or parent been a previous student, religious background or the school is ill-equipped to cater for student need. In addition, although admission/entry tests are no longer acceptable to select students for entry, schools have been able to continue to administer such tests under the guise that they assist streaming of students after they receive a place. School practices have not been interrogated sufficiently to establish if such tests are still being used to actually select students for admission. The TUI sees this as enabling gross inequity.

This equity issue becomes more obvious when one examines the manner in which schools receive state funding both in respect of teachers' salaries, per student grants and other grants. In Ireland approximately 730 schools from three different traditions and origins provide post-primary education. The range includes vocational schools and colleges; community and comprehensive schools; voluntary secondary schools (Non-fee paying but may seek small voluntary contributions); voluntary secondary schools (Fee paying), and a small number (5) of 'for profit' private schools. Although the schools offer the same national curriculum, the subject choice and options, and type of supports available to students, vary considerably.

The vast majority of fee paying schools (56) fall within the voluntary secondary sector, with teachers' salaries met by the state. Although they have a marginally higher pupil: teacher ratio, and are not in receipt of a per student capitation grant, the level of fees charged by schools contribute to exclusive recruitment practices. Fees range from as little as €4000 to over €10,000 and are only affordable by those on high middle to high income. They therefore act as a selection mechanism based on socio-economic background, although some colleges reserve a small number of places for people living in their local communities or from less well-off backgrounds. This highly inequitable situation is well demonstrated by the fact that some of these schools draw in up to €4m (depending on size) per annum, far exceeding the monies that would be available under the per student state grant. While the private schools have to

maintain capital and day to day running costs from the fees collected or other fundraising activity, a considerable amount is used to bolster the educational and social experience of students by including additional tutorials, a strong pastoral system, additional subject choice and options at higher level studies (which affect progression to post-compulsory education), social activities and in some case access to exclusive and high quality sporting facilities. TUI believes this adds up to state supported educational apartheid (General Secretary).

Many non-fee paying Voluntary Secondary Schools serve communities or families that can afford to make small voluntary contributions to enhance the state grant per student. This enables wider subject choice/options and/or additional extracurricular activities and pastoral support to be offered. These advantages are borne out when progression to post-compulsory education is examined. Fee paying schools and others that levy parents for voluntary contributions show higher than average student progression to third level, higher progression to universities and colleges of education, as opposed to the Institutes of Technology that offer 'applied' studies, and also show higher progression to the high status third level courses.

The detailed TUI response indicates equity issues that are echoed in the overall findings of the study. If these comments are set alongside those made about the provision of early childhood education in Ireland it can be argued that inequities that emerge in the earliest years of education can be sustained and even exacerbated in later years for some children. In addition, the structural inequities that exist in society can act to sustain inequities for teachers and for children in education.

Continuing Professional Development for teachers

Major barriers to Continuing Professional Development (CPD) for teachers are funding and the lack of a framework. Teachers' contracts only stipulate the number of teaching hours, so they engage in CPD generally in their own time and at their own expense. Where national programmes are introduced they are supported by CPD during school time. However, CPD for teachers is far more comprehensive than up-skilling in new curriculum areas. Specific areas in which CPD is required are special educational needs; literacy and numeracy (especially in lower secondary); language needs; ICT across the teacher range and age group; pre-school (in order to implement the new Early Years curriculum – 'Aistear'); minority groups; multi-cultural education. The TUI also identified ICT as an area of concern, because of the 'digital divide' in society, the need to use ICT to bridge the 'home-school' divide, and to resource ICT infrastructure in schools to enable these developments. Teachers' professional development is

inadequate especially in terms of up-skilling for working with minority and disadvantaged groups. ICT is very poorly developed both in terms of access to broadband, hardware facilities and software and digital mediums.

It is not only additional or targeted CPD that is significant in addressing equity matters. INTO identifies the need for an increase in support services for children and for teachers, such as speech therapists and educational psychologists. The TUI indicates that, in recent years, CPD has incorporated more attention to generic issues such as differentiated materials, active learning strategies and classroom management. CPD support has typically being confined to a small number of teachers as opposed to targeting the full range of teachers involved. Inadequate professional development shows a failure to recognise the changing composition of the student group in many schools and the specific and general teacher expertise necessary to translate 'inclusion policies' into practice in classrooms and schools.

Implications for EI

ASTI has always highly rated the importance of international teacher unity and a strong voice for the profession at regional and global level. For Ireland, work that EI is conducting on current trends is vital to keep unions informed of new ideological paradigms which will invariably be reflected in Irish debate and public discourse. It is doing a good job currently, especially via its role in GCE and the achievement of the MDGS, 2 and 3.

TUI would like EI to provide comparative data and analysis across countries with special reference to strategies that have proven effective or ineffective. A specific study on 'class size' and implications for teaching and learning would be helpful. Primarily lobbying and raising the profile of issues and injustices. Strong, accurate and comparative data must be a feature of this.

INTO note that International comparative information is always useful. Continuing to highlight inequities and sharing information across unions, and influencing international organisations that then influence governments.

Summary

The responses from the three unions consistently paint a picture of high demands on resources to sustain equity, which are difficult to meet in a climate of austerity measures. The implication of these shared perspectives is that without effective CPD it may be harder to achieve the quality of teaching that is needed to support goals for equity and quality. The ASTI respondent commented that 'Schools cannot



compensate for society', as did the INTO respondent 'Schools alone cannot compensate for difficult social and economic circumstances, therefore, family and community supports are also required if educational outcomes for disadvantaged children are to be improved'. In common with the overall findings from the study, these comments do not imply a sense of 'helplessness' but rather indicate the need for the matrix of social and economic problems to be addressed from co-ordinated policy perspectives.

As in other regions of the world, there are structural inequities in Ireland. Patterns of achievement for children are related to income and social class: children from low income families have lower levels of literacy, leave school earlier and have more difficulties at school. TUI and INTO indicate the need for increased resource allocation, and changes in resource distribution, as the key strategies for addressing equity matters in education, and more widely in society. Each of the thematic areas identified in this case study are interdependent, so that changes in one area (such as resource allocation) will inevitably impact on other areas, such as teachers' salaries and pensions; CPD for teachers in specialist areas; access to specialist education support for children in minority groups. However, working within the current economic climate of reduced allocation, and more targeted distribution, creates a number of challenges for sustaining equitable policies and practices.

3.5 ENGLAND

National Association for Schoolteachers Union of Women Teachers (NASUWT)

The NASUWT is one of several teacher unions in the UK which includes members across the teaching profession, from pre-school (birth to 5) to post-compulsory (age 16) education. The NASUWT represents teachers from the four UK countries England, Wales, Scotland and Northern Ireland. Wales, Scotland and Northern Ireland have their own devolved governments, funding arrangements and education systems, which are not identical, but share some common features.

The NASUWT'S website address is www.nasuwt.org.uk

The NASUWT website carries detailed information about unions' and government policies, and about recent and ongoing campaigns that focus on equity matters.

Case study responses

In the survey response, the NASUWT emphasised that the issues on which this survey are focused are reflected in all areas of the union's work: the union's equity statement indicates its commitment to an approach that seeks not to compartmentalise its work in relation to equality and diversity.

The NASUWT has been at the forefront of campaigning for equality in the workplace, education and wider society. The Union is at the forefront of formulating policy on equality issues relevant to teachers and within education in general and we have a long and proud tradition of standing up to all forms of prejudice, discrimination and intolerance throughout society.

The NASUWT provided a broad policy statement, rather than a detailed specification of union priorities. The reason for this was that the union works to ensure that all aspects of its work embed its commitment to promoting equality and diversity and tackling discrimination and prejudice. While it would be possible to point to aspects of government policy and legislation that aim to address specific areas, the NASUWT's view is that inequities can be identified in all these areas. In this respect, none of these aspects of Government policies can be said to have been implemented fully given the incomplete achievement of these objectives.

The NASUWT did not specify any priorities or 'hierarchy' of equity issues for teachers or for children. This is because the union believes in a holistic view of equalities-related

activity which should be based on the clear principle that addressing all forms of discrimination and prejudice should be of equal importance, and that understands the connections between different aspects of equalities work as they relate to distinct groups. The union's website provides information on relevant union and government policies, along with past and current campaigns focusing on equity matters.

Examples of recent initiatives and campaigns are given with regard to barriers to achieving equity. Issues associated with barriers to achieving equity within the education systems in the UK are highly complex and continue to be the subject of significant debate. However, particular examples of policy in respect of equity have included barriers to access to leadership positions for black and minority ethnic teachers. On this issue the NASUWT has been involved in joint work with the National College, the body responsible for entry into and development within school leadership roles in England.

Other areas of recent attention have focused on the impact of far right racist and fascist organisations on the schools system, prejudice-related bullying, the extent to which the curriculum and qualifications structure supports the promotion of equality and diversity, and the impact of age discrimination on teachers and the education system generally.

The union has had a significant influence on the shape of Government legislation, policy and practice. For example, extensive information is available in the Trade Union Congress' 2009 Equality Audit which highlights the impact of the NASUWT's work in areas including, pay, pensions, health and safety and professional development.

The NASUWT believes that, where it is appropriate, pupils with disabilities and special educational needs should be educated in mainstream settings with effective access to additional support where necessary. However, the NASUWT is clear that a genuinely inclusive education system involves the provision of special and alternative settings, working in partnership with mainstream schools, for pupils for whom an objective assessment of their needs indicates that this would represent the most effective means of education.

Issues about the funding of different sectors raise comparable considerations in relation to the need to base funding decisions on the specific needs of these sectors (pre-school, primary, secondary, tertiary education). A crude policy of uniform funding of all sectors could result in serious inequities given the inability of such a system to take account of the distinctive needs each sector may have.

In respect of schools choice, in the context of the education system in place in England, parents have the ability to express a preference for a particular school but the necessary constraints in an education system working with finite resources means

that it is not always possible to ensure that this preference can be met. While there may be circumstances where it is legitimate for parents to seek to send their children to particular schools, a key concern is that the current system of school admissions is based on a particular notion of parental choice that casts parents as consumers of educational services within a context of a quasi-market for school places. The competition between schools generated by this approach not only seeks to secure choice between providers as a benefit in itself, but is also intended to encourage all schools to raise standards of achievement as a result of the serious potential consequences for any school appearing to be less successful than its competitors. The NASUWT believes that this conceptualisation of parental choice is based on an outdated and inappropriate view of the ways in which relationships between schools and parents should be developed and sustained. The existing model of choice generates competition between schools rather than the greater levels of institutional collaboration that are essential to the effective and sustainable delivery of key aspects of educational provision.

With reference to the extent to which educational provision should be personalised for individual children, the responses indicated that while a minority of pupils in the education systems in place in UK are educated in single-sex settings, the key point in respect of educational gender equality is that educational provision must be established that ensures that boys and girls are able to have their educational needs met effectively and which allows them to reach the highest level of attainment of which they are capable. This can require the deployment of approaches to curriculum design and implementation that specifically address gender inequalities. For the NASUWT, it is this consideration that should be given primacy in strategies to address educational gender inequality.

The extent to which educational provision should be made in a pupil's home language, or in the principal teaching language used in the setting within which they are educated, is a matter that should be determined for each pupil on the basis of professional judgements made by teachers and head teachers. Critical in this context is the extent of support made available to staff in schools to support pupils and staff in these circumstances. In the context of the education systems in the UK, significant proposed reductions in public expenditure announced by the Government place at risk the ability of local authorities to maintain current levels of support for pupils with English as an additional language.

The current pay arrangements in place in the overwhelming majority of state-funded schools in England involves, in effect, automatic periodic progression up the pay scale unless information gained from the performance management process gives rise to concerns that this would be inappropriate. Through its work in social partnership with the previous (New Labour) Government, the NASUWT was closely involved in

the development of guidance that recognised the need for these arrangements to be implemented in schools in a way that reflects fully the letter and spirit of equal pay and equality legislation and to ensure that comprehensive arrangements were put in place to ensure compliance with these statutory provisions. The future of these robust arrangements in respect of pay equality has been placed in significant doubt by the commitment of the Government (a Coalition government of Conservatives and Liberal Democrats took office in 11 May 2010) to alter radically the contractual provisions' under which teachers are employed and to place more schools beyond the scope of these provisions.

The respondent gave a comprehensive view of the ways in which EI can support the work of the unions at national and international levels, including through research-based activity that allows for objective and informed analysis of equity-related policy and practice in a wide range of education systems and with which practice in the UK can be compared. This would complement work to evaluate the effectiveness of provision in the UK with that elsewhere by highlighting potential strengths and alternative approaches where current arrangements have been identified as being in need of refinement or possible replacement.

The NASUWT respondent provided further suggestions for the future work of EI:

Education International has a well-established range of policy objectives focused on equity which it continues to pursue through its work in relation to the joint UNESCO/ILO apparatus on the status of teachers, its activity as part of the Global Campaign for Education which continues to focus on educational inequality in developing countries and in its commitment to the development of a comprehensive policy on education. There is a risk that these areas of activity may be given less emphasis as a result of understandable concerns relating to action being taken in a significant number of countries to tackle sovereign debt issues and the ongoing consequences of the global economic and financial crisis.

EI must make clear that, notwithstanding the importance of these matters, no excuse can be accepted for downgrading the importance of equalities issues for all those with responsibility for the development and implementation of education policy. In particular, EI must work closely with affiliates to counter pressures from business organisations in a range of countries, that equalities legislation should be relaxed given the alleged costs of compliance for employers. EI must use its influence to argue strongly that the solution to the economic challenges confronting many countries is not to reduce the legal protection against discrimination and prejudice members of affiliate organisations enjoy in their workplaces.

Commentary

As the NASUWT respondent notes, there are significant costs to employers of equalities legislation. The case studies for England, Ireland, New Zealand and Canada all indicate that the current economic downturn is influencing equity issues in countries that would be considered 'highly developed' in economic terms, and in the HDI index. In common with the case study for Ireland, equity matters are being influenced by the 'austerity measures' of the current British Coalition government, and by an ideological shift towards the privatisation of public sector services. In education this involves promoting free schools and academies in the primary and secondary education sectors, promoting parental choice, relaxing the requirement for some adults who teach in schools to have qualified teacher status, and the marketisation of education services.

These indicators suggest that continued progress towards equity matters for teachers and for children may be at risk, and that existing progress may not be sustainable. For example, the advances in early childhood education and care that were made under previous New Labour governments were widely regarded as contributing to greater social justice, but this sector has seen some of the most immediate cuts. Other, 'austerity measures' in the public sector mean that funding will be targeted on 'the most disadvantaged' children and families. For example, there is also the threat to buying in support services for at-risk children, as these services are now a 'commodity choice' for individual schools.

Those under threat include children with special needs and disabilities, and children from vulnerable groups, such as Gypsy-Traveller children. In addition, although teachers have parity of pay and status on entry to the profession, it is unlikely that this will be sustained over time. Career (and salary) progression is more varied in primary and secondary schools according to the size of the school, and the opportunities for leadership and management roles. (Qualified teachers in the private sector do not have to be paid on national scales).

This case study illustrates that unions in economically developed nations may find themselves having to fight new battles for equity, equality and quality because the gains made over time can easily be eroded under changed political and economic conditions.



3.6 POLAND

Polish Teachers' Union (ZNP)

Currently the Polish Teachers' Union (ZNP) is the largest affiliated union in the country, and was established in 1905. The following site has further details on the ZNP :

<http://www.znp.edu.pl>

The ZNP took part in the initial pilot survey, so information from this, along with the survey questionnaire and case study details are included here. In the pilot survey, the respondent provided the following background information about the education system, which illustrates the 'mixed economy' of public and private funding of education in Poland:

In 2008/09 almost all pupils attended public-sector schools (98 %). Most of the funds come from the state budget. In line with the Education System Act of 1991, schools can be of two types: public (state) schools, which offer free education within the framework of the core curricula, and non-public schools. The latter can be civic (social), church or private schools. All these schools may have their own curricula, which are approved by the Minister of National Education. They are financed by fees received from parents. Funds can also come from private enterprises and foundations. Non-public schools with the rights of public schools are eligible for a grant calculated according to the number of pupils, which equals 100% of the average cost of educating a pupil in a public school. Non-public schools in Poland have the right to issue school certificates that are recognized by all other schools and by the universities. They may be distinguished from the public schools by their individualized teaching programmes, by a wider range of curriculum choice and by a higher standard of foreign language teaching. The administration, organization and decisions relating to the use of financial resources by schools are the subject of consultation between the school and the body running the school, i.e. local authorities (gminy) – in case of kindergartens, primary and lower secondary schools, and district authorities (powiaty) – in case of upper secondary schools.

In Poland there are more than 326 private (non-public) secondary schools and more than 130 public secondary schools. However, the numbers of students in public secondary schools is much bigger (approx 1,300,000 [60% of pupils] to approx 600 thousand [30% of pupils] in private schools).

The union's policy statement/s on equity is as follows:

In its policy the ZNP applies a definition of the concept of equity included in EU directives. It appears in reference to: preventing discrimination in the workplace (salary, professional career); preventing discrimination on the basis of trade union membership; fighting against a limited access to education for certain social groups (depending on their financial status and social background); religion; promotion of sexual education despite the opinion endorsed by the church. The ZNP trade union does not have one policy paper concerning equity/equality in education. There are many statements on different issues, fragments of which include opinions on different aspects of equality in education. In Poland teachers have lowest salaries in Europe. This situation is unfair but rules about how the salaries are established are the same for all teachers in Poland independent of type of school or region.

The following items were identified as the most important issues in the union's policies for children:

- Equality of educational access
- Equality of educational outcomes
- Equity for students of all cultural ethnic backgrounds

The following reasons were given for inequities in the country's system:

50% of pre-school children, mostly from socially and economically underprivileged areas, do not go to kindergartens, which influences considerably their educational pathway. As a result of the political transformation in Poland, there are more and more disadvantaged people. There are at present about 1 million malnourished children in Poland. Educational policy regulations do not include the question of gender discrimination (e.g. in curricula).

The following items were identified as the most important issues in the union's policies for teachers: Equity for teachers in terms of pay, career opportunity and status. Though officially, qualifications are required and provided, standards of education call for modernisation as they are inadequate to current needs. There is a discrepancy in working conditions and the quality of teachers' in-service training between public and non-public schools. Gender issues also need to be solved. Women employed in education receive a lower pension because of maternity leave and still must fight against the so-called "glass-ceiling". The Teachers' Charter, being a form of collective bargaining, guarantees the same pay conditions and working time conditions for all teachers. More than 90% of teachers receive higher education. So there is no

discrepancy. The government protects insufficiently people of a different sexual orientation. When it comes to the implementation of sexual education at school, it opts for the position typical of the Catholic Church.

The main inequities were identified as follows:

- lack of appropriate education provided for pupils
- lack of appropriate education for teachers
- lack of effective means of preventing discrepancies in infrastructure
- lack of effective means of preventing discrepancies between geographical regions

The ZNP takes part in international actions such as Education for All and tries to involve the government in such initiatives. It co-creates educational policy and undertakes civic initiatives. The ZNP is a member of the Coalition for Equal Chances, being an anti-discrimination group whose first meeting took place on 19th April 2010. At the ZNP there has also been created an Equal Treatment Committee whose aim is to promote equity and improve anti-discrimination law valid in Poland via e.g. training courses provided for equal treatment experts (anti-discrimination law, equality in education, good practice examples, etc.). The ZNP helps to prepare opinions, bills, legal regulations or protest letters addressed to the national authorities. Moreover, the ZNP has, over a number of years, been working on the code of conduct. The aim is to improve the status and legal protection of education workers and enhance professional and ethical responsibility towards pupils, colleagues and parents.

The respondent identified the following main goals which the education system should achieve in order to ensure equity:

- no discrimination to young teachers (salary)
- access to kindergartens (50% of children, mostly from disadvantaged backgrounds, do not go to kindergarten)
- access to education in socially underprivileged areas
- teachers' qualifications in non-public institutions

There are barriers to achieving equity in the country's education system, including:

...substantial discrepancies between local government units when it comes to education financing. There is also a demographic aspect: population decline brings about reduced expenditure on education. Fewer students means less money transferred to a given school according to the so-called principle of education vouchers.

The ZNP respondent noted that it was particularly difficult to answer some of the questions, as the existing legal regulations in Poland only theoretically guarantees equal treatment to all. This stands in opposition to practice. For example, the problem of children with learning disabilities is not easily solved, because although one should opt for their complete integration, such a decision would require adequate preparation of teachers and the implementation of infrastructural solutions, such as the adaptation of school buildings to ensure access. Parents prefer to choose institutions where their children could work with specialists and can feel comfortable.

Commentary

The case study for Poland illustrates many issues that are common to other case study countries. However, the particular equity issues arise from the rapid social and economic development of the country in post-communist eastern Europe. This in turn has brought aspirations that underpin equity issues, such as expanding pre-school education, and improving the quality of educational provision across all sectors. Although the biggest provider of education is the state, the mixed economy of private and public sector education indicates differences between the two in terms of class size, teaching programmes, curriculum choice, and foreign language teaching. In terms of equity and quality, it seems that the ZNP aims to develop its policies from a low base-line, which reflects concerns about large numbers of disadvantaged children, malnourishment, and access to educational provision from pre-school onwards. For teachers, gender and sexualities discrimination is also highlighted in a joint report by EI and Public Services International (2007). This report notes a measurable increase in homophobia in some parts of Eastern Europe, with Poland being a 'particular flashpoint'. In addition to poor pay and inadequate conditions of service, these equity issues demonstrate the need for collective action at national and supra-national levels to tackle entrenched inequities. The Poland case study illustrates the diversity of educational provision across European Union countries, and the extent of progress that needs to be made on a range of equity issues.

3.7 ZAMBIA

Zambia National Union of Teachers (ZNUT)

Zambia is situated in the east central area of the African continent and, like other African countries, incorporates indigenous African, Islamic-Arabic, and Western heritages. The Zambia National Union of Teachers was founded in 1953 as the African Teachers' Association, which transformed into Northern Rhodesia African Teachers' Association (NORATA) in 1960. On 15th June, 1962 the Association became a union and changed its name to Northern Rhodesia African Teachers Union (NORATU). On 4th March, 1964 NORATU was changed to Zambia National Union of Teachers (ZNUT) and had the first recognition agreement signed between it and the Ministry of Education.

Currently there are approximately 71,000 teachers and lecturers in Zambia, and ZNUT has over 38,000 members. Its membership cuts across all sectors (Early childhood, Basic, High, and Tertiary Education). Within the sector there are two other unions; Basic Education Teachers Union of Zambia (BETUZ) (16,000 members) and Secondary Schools Teachers Union of Zambia (SESTUZ) – 6,000 members. Further details of the ZNP can be found on the website: <http://www.znut.org.zm>

Zambia carries a historical legacy of colonialism and poverty which is more acute in rural than urban areas. However, it would be over-simplistic to position 'poverty' as the main influence on equity or as the main barrier to development. National policies are addressing educational provision, from early childhood onwards, drawing on national and international frameworks such as UNCRC and Education for All goals (Chinunda, in Education International, 2009).

These policy frameworks set out clear aspirations for the development of education in Zambia. However, the responses from the ZNUT indicate a range of challenges, and some structural barriers, to achieving equity, which are related to economic, cultural and historical contexts.

The ZNUT goals on equity include:

- Access to basic education for all children of school-going age, regardless of their economic and social background.
- Equal pay for equal qualifications.
- Employment of all trained teachers to give a chance to every child to have access to a teacher.
- Equal opportunities for career progress for all teachers, regardless of their sex.

Uneven distribution of resources emerges as the main equity issue, and impacts on children and teachers in different ways, for example:

- Equity of educational resource distribution
- Equity for students of all economic backgrounds
- Equity across all geographical areas (rural and urban)

These items are important for students because of the policy aspiration to give access to students from poor and disadvantaged families to quality education, regardless of their location. Equity for teachers in terms of career opportunity, conditions of service and job security are important because they relate to their motivation, promotion and career development. Inadequate resources, the shortage of teachers, and the uneven distribution of teachers between rural and urban areas were seen as barriers to achieving equity, with the main inequities being resource distribution, and imbalances of teacher distribution in terms of gender.

The case study questions aimed to explore these issues in more depth, with contextual explanations given for their impact on equity matters. The uneven distribution of teachers between rural and urban areas impacts in the following ways on the equity of provision:

- Higher pupil -teacher ratio (60 to 1) per class due to the shortage of teachers in rural areas.
- Reduced contact time between teacher and pupil due to large number of pupils in a class.
- Low quality of education - less individual attention is given to children due to the high numbers of pupils in some classrooms.
- Few female teachers to act as role models for rural girls hence reduced completion rates for girl child in rural schools.
- Shortage of classroom space, resulting in double class or shift for teachers.

The uneven distribution of resources impacts on equity for children and teachers in the following ways:

- Shortage of learning and teaching aids, 4 to 5 children sharing one text book.
- Shortage of teachers, high pupil – teacher ratio.
- Large classroom cause management problems and lead to poor teaching output, low quality of pupils being churned out.
- Increased dropout rates at both grades 7 and 9, because the number of places available reduces in higher grades.

The uneven distribution of resources impact on the quality of education in the following ways:

- High dropout rates from schools
- Pupils reading below grade levels
- High illiteracy-levels
- Low numeracy levels among pupils

The main barriers to access to basic education for all children of school-going age, regardless of their economic and social background include:

- Legal frame and policy: for example the Zambian constitution has not enshrined education as a human right, so that every child would have the right to education. Therefore no one is held accountable for the provision of education.
- Budget allocations to the educational sector are below the UNESCO recommendation of 24% of the country's GDP. In Zambia it is currently at 19%.
- Shortage of classroom space.
- Distances between schools and homes, an average of 8km between schools in rural areas, making it difficult for children below the age of 7, and girl child, to walk long distances.
- Poverty levels are too high in some rural parts of Zambia, hence some parents prefer using the kids to work in fields or work for food.
- Hunger, in some cases, children have nothing to eat - health and nutrition provisions in educational institutions not attractive to learners.
- In some cases people see the type of education being provided as not being relevant to the environment.

Inadequate resources, the shortage of teachers, and the uneven distribution of teachers between rural and urban areas were seen as barriers to achieving equity. The main reasons for resources being channelled into urban areas are political, economic and structural:

- Because of the large population in urban areas and the number of literate people, their voices are louder than those in rural areas.
- Urban areas tend to expend very fast because people are migrating from rural areas in search of employment, and demand for education is greater.
- Stronger lobby groups
- Private schools are emerging more in urban areas because parents can afford to pay for their children.
- Resource allocation also goes with population.

In addition, there is an equity issue regarding the low deployment of female teachers to rural areas. The reasons for this are cultural and structural:

- Female teachers shun rural areas because of distances they have to travel to find their basic needs, as most of our rural areas are less developed in terms of infra-structures such as shops, markets, roads, and hospitals, no piped water, electricity etc.
- Fear of not finding male partners to marry them. Very few working men (in rural areas).
- Sometimes it is just attitude.
- Implementation of the policy on teacher deployment has not been implemented effectively.
- Policy on teacher deployment not being implemented, especially with AIDS policy advocating against separating partners for a long period of time.
- Administrators tend to listen to female teachers.
- Marriages, most female teachers are married in urban areas and past practice in Zambia has been that females who get married to join their husbands and not vice versa
- Employment opportunities in urban areas, such as mines and other industries are concentrated in urban areas and the workforces mainly are males.
- Transfer policy: when men are transferred from rural stations to urban areas, they also move with their spouses.

The survey identified 'unfriendly infra- structure in schools' as a barrier to equity. The nature and impact of this was identified as follows:

- Sanitary problems (no availability of water borne toilets and also the location of toilets within the schools). In the absence of proper sanitation girls and females would prefer to stay away from school to avoid embarrassments.

Other barriers to equity include:

- More schools being constructed in urban areas. More resources being channelled into urban areas.
- Too much concentration on basic education.
- Infrastructure in most learning institutions is not user-friendly to the disabled.
- Lack of appropriate equipment for those with learning disabilities.

In spite of some of these barriers, the ZNUT indicated the ways in which the union had influenced government policies. These included:

- Equal pay for equal qualification.
- Teachers with degrees, whether in primary or secondary education, get the same salary.
- Salaries for both female and male teachers with same qualifications are the same.
- Posting of teachers, emphasises the posting teachers in rural areas and the introduction of rural hardship allowance has encouraged teachers to go and work in rural areas.
- Introduction of re-entry policy for girls who get pregnant while in school.

Three of the main goals for achieving equity are:

- Access to basic education for all school age children.
- Distribution of resources to both rural and urban areas.
- Removing gender disparities at all levels of education.

In order to achieve these equity goals, the following areas need to be addressed: more classrooms and schools; training of more teachers; learning and teaching materials for both urban and rural schools; providing more females in rural areas as role models.

The main gender disparities for teachers and for children are as follows:

- Opportunities for further studies are limited for female teachers due to lack of sponsorship.
- Promotions are limited for female teachers, because available positions are only available in places far away from their marital homes or hard to reach areas.
- Most female teachers and girls are allocated to Arts subjects as opposed to sciences and this limits their opportunities to pursue other challenging courses.
- Most of the schools or institutions, especially in rural areas are manned by male administrators.

The ZNUT identified areas in which EI could help the country to achieve its goals at national and international levels:

- Lobby our governments to increase funding to education and recruit all the trained teachers not yet employed. (national)
- Lobby with donors and multinational corporations to increase funding to developing countries in the education sector. Organise forums for education to sensitise government officials from developing countries on equity. Sensitise member organisations on the roles they can play to promote equity in their countries. (international)

Commentary

The case study for Zambia indicates many structural problems that arise from the country's historical legacy, and from its current economic position. However, the equity issues identified here should not be seen as insurmountable barriers to progress. The ZNUT is active in national and international forums, and is well-informed of the wider socio-cultural and contextual features of Zambian society. Zambia was a case study in the Pan-African Early Childhood Education seminar (Education International, 2009). This report noted that Zambia has high poverty levels of around 67% of the population, which are exacerbated by rural to urban migration. Provision of ECE education and services is constrained by availability and accessibility (for example to private fee-paying settings that are beyond the reach of poor families), and by other social factors such as child labour, and the impact of HIV/AIDS on family composition. As indicated in the findings of this study, access to early childhood education is an equity issue because it can provide a 'head start' for children, which can lead to virtuous cycles of achievement in subsequent education. The Zambia case study demonstrates how one equity problem may need several solutions, based on an alignment of resources and priorities across different government departments and/or funding providers.

It is worth making some comparisons with other African nations, based on the survey responses from Liberia (ALPO) and Kenya. ALPO identified all equity issues in the survey as being important, with poverty and social class being the main inequities. ALPO does influence government actions, but did not give any details. The main equity goals were to make education a priority through budgetary allocations, to increase the number of schools, to increase resource distribution across urban and rural areas, and address gender issues. One practical solution was being proposed by ALPO, namely providing basic rural housing for teachers to attract them to areas of historical teacher shortage. In common with Zambia the ALPO wants EI to provide support and interventions at international level.

The Survey response from Kenya indicated four main goals: free primary education; government aids to secondary education; bursaries for less fortunate children; and



constituency development funds, with 50% channelled to education i.e. building classes, buying books and stationery. Additional perspectives on teacher education and supply in African nations are provided in the case studies detailed by Kruijer (2010) specifically on strategies for up-grading unqualified primary teachers in Tanzania, Malawi and Nigeria. These initiatives propose that positive outcomes can include improving the position of female teachers, increasing the proportion of female teachers in primary schools, providing positive role models for girls, improving skills needed for teaching children with special educational needs, and improving the quality of educational provision in rural areas.

The case study of Zambia indicates that many different factors are implicated in equity matters, for teacher and for children. This means that they are not amenable to simple solutions. Although some of the proposed strategies are inevitably resource-hungry, it would be inappropriate to see poverty as the main cause and explanation of some of the equity issues described here, without some consideration of why such widespread poverty continues. Pence and Nsamenang (2008) see 'within-country' poverty in African nations as a direct outcome of previous and current colonial interventions, and pose the following questions:

Why can't Africa garner the means to provide for its next generations in spite of its rich material and human resources, which have thus far been drained by and for foreign interests?

Why does the development community stigmatise African children's participative learning, and deeply felt efforts to contribute to the family's survival as inappropriate child labour, whilst less actively criticising international economic systems that relegate Africans to being price-takers rather than price-fixers – a very significant contributor to poverty in Africa? (Pence and Nsamenang, 2008: 33).

The case study of Zambia indicates that contextual factors must be considered in individual country's trajectories of development. The issue that 'In some cases people see the type of education being provided as not being relevant to the environment' perhaps indicates that intergovernmental goals and aspirations (such as UNCRRC, EFA, MDGs) need to be carefully contextualized to avoid a dominant 'western' or 'Eurocentric' perspective on educational institutions and practices. The response of the NZ Post-Primary Teachers' Association noted a similar issue as one of the barriers to equity in the context of the country's diverse communities:

A system of education and curriculum that is still largely Eurocentric in nature that fails to cater adequately for those from different cultural/ethnic backgrounds.

One of the key themes of this report is that each country has its own trajectory of development regarding the evolution of its education system within wider social policies. There are common issues with regard to the cultural specificity of those trajectories, in that many of the equity matters are country-specific (especially with regard to indigenous peoples) as well as international (for example, with regard to human and children's rights to education). What differs in Zambia is the post-colonial legacy which continues the influence of minority world systems and values on majority world development. The findings from this case study indicate that Zambia, along with other African nations, needs the support to find its own ways forward to solve problems and challenges, and achieve its equity goals.

CHAPTER 4: DISCUSSION

The unions that have participated in the study have demonstrated their ongoing aspirations and progress towards equity, equality and quality in their education systems, and their roles in advocating and supporting equity goals for teachers and for children. The outcomes indicate that equity matters because education (perhaps more than any other public service) is expected to contribute to a social justice agenda for children, for families and for society. It is also evident that the pace and direction of social, economic and cultural changes are making complex demands on teachers' professional knowledge and expertise. At the same time, the financing and resourcing of education is changing as a result of global trends that are impacting in different ways on education systems. These economic conditions, in particular, raise questions about the progress and sustainability of equity matters across all regions of the world.

In summary, the main equity matters that have been identified in this study are as follows:

- Equity matters for teachers and for children are inextricably linked: teacher quality is fundamental to children's achievements and outcomes.
- There is a need for increased resources, and for redistribution of resources. However, in a reduced funding environment, unions may have to consider points of trade off between horizontal and vertical equity goals.
- Whilst progress continues to be made on equity matters for teachers, there are a number of threats to teachers' pay and conditions, arising from different influences. Progress that has been made in some countries towards equity goals may be reversed or stalled by the global economic downturn and 'austerity measures'.
- There are country-specific inequities, but it is important to avoid uncritical dichotomies between developed and developing countries (e.g. the responses from the Poland, Zambia and Canada unions mention hunger/malnutrition as barriers to learning and as an equity issue).
- There are equity challenges in different countries and in different sectors, from pre-school through to higher education. Decisions have to be made about where to target public funding, but those decisions may prevent rather than enable equity (trading-off rather than trading-up).
- There are threats to professional autonomy and professionalism, through the use of 'para-professionals', centrally defined curricula, testing and assessment regimes, and through the changing landscape of teacher education programmes.
- More funding is needed for professional development at pre- and in-service levels, particularly for diversity issues and children with special educational needs.

- Professional development programmes need to pay more attention to understanding diversity in society, specifically cultural ways of learning.
- The withdrawal or reduction of funds and special programmes is having a specific impact on minority and disadvantaged groups (e.g. indigenous communities in Canada and New Zealand, and Gypsy, Roma and Traveller communities in Ireland).
- The 'cascade effect' of inequities in education impacts on children's trajectories and opportunities, from pre-school through to higher education.
- The 'cascade effect' of inequities in education impacts on teachers in terms of career progression, deployment, and opportunities for professional development.
- Inequities in education are situated within a wider matrix of inequities in society.
- Multiple and coordinated solutions are needed across various areas of social and economic policy to address 'equity gaps'.
- Whilst unions aspire to trading-up in their equity goals, there are pragmatic reasons why trading-off occurs, because of structural barriers. Unions' and governments' policies are not always aligned.

4.1 Contexts matter

It is argued here that in terms of equity matters, contexts also matter. The literature review in Chapter 1 provided the background for considering the complex intersections between equity, equality and quality in education systems around the world, and incorporated many of the equity issues that are identified in 'global monitoring' reports from organisations such as the OECD and UNESCO. Whilst this review served to indicate broad issues and trends around equity matters for teachers and for children, the findings of this study indicate that these need to be contextualized within each country's socio-cultural-historical and economic 'niche'. No attempt is made here to compare different countries' education systems, or the goals and policies of the teachers' unions.

This is because each country's niche differs in many ways, and it is not possible to compare the mechanisms that sustain or disrupt equity goals, or the impact that one area of policy has elsewhere in the system. Each country is at a different stage, and is subject to ongoing internal and external influences, some of which may be perceived as common threats to equity (for example, the global economic downturn; privatization; teacher supply and deployment).

These factors go some way towards explaining why some equity items were more important than others at a particular time, and in the context of each country's trajectory of development. In some cases, the mechanisms did not exist at government level to implement unions' goals and policies. Some equity matters may be positioned as a challenge to the unintended or negative effects of government policies. It is also clear that some equity issues need to be addressed before others. For example, in Zambia, providing access to students from poor and disadvantaged families to quality education, regardless of location, is an important equity goal that aims to overcome some of the country's structural and historical inequities. In countries with scarce resources, access to basic education may have to be prioritised before other equity goals such as access for children with special educational needs and disabilities.

Although the trajectories of the countries surveyed in this study indicate that continuous improvement and development around equity matters is an aspiration, those trajectories may be disrupted, and even reversed, by factors that are beyond the control of unions or national governments. These factors pose new challenges for teachers' unions and for Education International. For example, in several 'very highly developed' countries the impact of the global economic downturn has resulted in 'austerity measures' that are impacting on teachers' salaries, pensions, and recruitment. The 'digital divide' was identified as a problem in Ireland, and is, therefore, not just an equity issue for developing countries. In New Zealand the gains made in the early childhood sector are being eroded because of cuts in public sector funding. In Finland, choices are being made between shifting to more privately-funded provision in early childhood education, and sustaining more publicly-funded provision in tertiary education. As indicated in the literature review, there are equity impacts of these 'trade-offs', and it seems evident that trading-up to more equitable systems, with higher quality is increasingly problematic.

These findings indicate that there are complex intersections between equity and quality. Both are vulnerable to reductions in public sector funding, and to increases in fees. The achievement gaps identified by Milner (2010) have been conceptualised here as equity gaps and, as such, are also vulnerable to changing economic contexts. The question of which groups stand to lose the most benefits from the economic downturn remains open. For example, in England, educational provision and related services for children under five will no longer be universal. Instead, funding will be targeted not just at 'the disadvantaged' but at 'the most disadvantaged'. In terms of equity it is not yet clear just how disadvantaged children will have to be in order to receive provision and services. In education, and in society, such policies have potential knock-on effects in relation to individuals' life chances, and to social justice. Such choices are not just technical or resource-driven, they are deeply ethical in relation to equity and equality.

Whilst the case studies have predominantly descriptive value by portraying national contexts and trends, there are some comparative elements regarding national, regional and global concerns, and the ways in which these are also reflected in unions' policies and goals. The range of choices available (for example, where and how funding should be targeted), is also influenced by the range of constraints, and the range of demands that are made on a country's education system, especially in relation to wider inequities in society. These influences operate at the level of national governments and in the governance of education, along with national and regional differences in the demands and expectations of what education can accomplish. However 'equity gaps' can also be seen as spheres of influence for teachers' unions when deciding where to focus specific campaigns and policies that are aimed at vertical equity. The study also exemplifies that achieving and sustaining equity is a dynamic and shifting process. These are clearly matters for national governments, but also for unions' policies in relation to how they work with (or contest) government policies.

However, it should be recognized that unions' and governments' policies for equity may not be in agreement or in alignment. More nuanced research is needed how structural barriers to equity work in individual countries, and for specific communities, and what are the implications for teachers, and for unions' goals and priorities. Such research would also provide the contextual detail that is missing from global monitoring reports that focus on educational outcomes in a narrow range of curriculum subjects. The findings regarding structural barriers, and the ways in which these create barriers to equity for teachers and for children, indicate that more attention needs to be paid to equity goals as well as curriculum goals in international measures of achievement and effectiveness.

4.2 Funding and Resourcing Matters

It is perhaps not surprising that the findings from this study indicate that resources are the most important concern in human, material and financial terms. In addition to calls for more resources for minority groups in particular, there are also calls for better targeted resources for children and for teachers (for example ITE and CPD training, financial incentives, culturally appropriate training and curriculum development). This reflects the arguments made by Brown (2006) regarding horizontal and vertical equity. Whilst the findings indicate that unions uphold in principle the equal treatment of those who are equal, in reality the nature and scale of equity matters suggest that vertical equity may have to be a strategic priority. That is, unequal, but equitable, treatment of those who are not equal has to be considered in order to reduce inequality. There is evidence that unions focus on horizontal and vertical equity, in order to look at whose situation can and should be improved, and how that can be achieved.

Achieving equity goals is undoubtedly expensive, and it is tempting to state that more resources are the answer to improving equity and quality. However, the issues are complex. Much of the literature in the field points to the need for redistribution of resources in order to improve equity in education: this is because equal treatment of everyone does not necessarily result in equal opportunities (e.g. Brown, 2006; Deluca and Stillings, 2008; Matear, 2007; Motala, 2009; UNESCO, 2008). Moreover, increased resources do not always result in better outcomes for children. As noted in the literature and analyses of the data, structural inequities in society need multiple solutions, and may need very specific solutions in education. At a national level, there are four aspects that affect how much is spent on education as a whole: the national wealth of the country; what proportion of that wealth is allocated to the budget revenue; what proportion of the budget is allocated to education; and what external resources are provided (e.g. through aid, or private financing).

Countries with lower levels of national wealth may spend a lower proportion of that wealth on education, which means that achieving equity goals may be more challenging. Those people with a higher income are less affected by underfunding in public services, as they are able to buy those services privately. Those who are already in poverty, however, must rely on publicly funded services, and when the funding of these services suffers, so does the quality of the services that disadvantaged people receive (UNESCO, 2008). Even relatively small top-up fees (including in the private/dependent sector) can prove to be a barrier to participation for families at the lower end of the socio-economic range. Therefore sustaining equity goals and aspirations is intrinsically linked with sustaining access and quality of services for the most disadvantaged groups within societies.

The patterns of resource distribution (be that financial or human capital) within education are also subject to wide variation. Resources may be allocated to schools in many ways, including: proportionately depending on the number of pupils; as a reward for good performance; to specific programmes designed to fulfil certain functions; in combination with private funding; and weighted according to perceived need. Although there is an international commitment to achieving universal primary education, some countries (particularly those in the majority world) use a fee-based system to 'top-up' school resources. There may be some exemptions for the most disadvantaged families, but only in schools where this can be afforded (for example through public or charitable subsidies).

Different schools, however, often charge different levels of top-up fees, dependent partially upon the level of disadvantage of their intake, so more disadvantaged families would pay less for their child's education, but this might be at the expense of the quality of the school environment (Penny et al, 2008; Motala, 2009; UNESCO, 2008).

More generally, there are calls for centralized resource allocation that is based on need, in order to better support the schools who work with the most disadvantaged children (e.g. Brown, 2006; Lemon, 2005; Motala, 2009; Welsh, 2004; West, 2006), rather than resource allocation based on outcomes, that does little to address the wider structural and social inequalities that often lay behind variations in performance (Cele, 2005), or decentralized resource allocation that leaves schools in disadvantaged areas least able to resource quality education (Penny et al, 2008).

Resource allocation for students with special educational needs and disabilities is, in some countries, dependent on need, and extra resources are channelled towards schools where such children attend. However, as Perry (2009) argues, the level of support given to the least able children in school varies widely between countries, and this is evident in the findings of this study. The level of support is dependent on a range of factors such as teacher supply, teacher development and training for children with special educational needs and disabilities. In addition, providing access to education needs to be aligned with accessibility to buildings, to resources, to ICT, to the curriculum, and to teachers. In contrast, resourcing for more general socio-economic disadvantage does not often work in the same way: how disadvantage is defined is important in determining levels of resourcing (Deluca and Stillings, 2008).

While there is clearly a reduced capacity of schools in disadvantaged areas to raise their own funds, governance and decision making can still be devolved towards the school level (Brown, 2006; Deluca and Stillings, 2008; UNESCO, 2008). This can help schools work towards appropriate strategies for their own context, and also involve the school users more in decision making. Such reforms may need to be supported by help for schools and communities to develop their own governance capabilities (Brown, 2006; Singh and Taylor, 2007), which is an area in which unions might have some influence.

However, in a reduced resource environment a school's capacity for fund-raising is likely to be compromised, and the evidence from this study indicates that schools in low SES areas are already making difficult choices. These factors raise questions about current directions in the overall policy environment for education at national and international levels.

4.3 Policy matters

Policy-making in education has increased substantially in the last forty years, with many countries in the majority world continuing to look to the minority world not just to find out what is happening, but to find out what works. Policy technologies in education have been driven by neo-liberal and neo-conservative agendas, with increasing control over curriculum, pedagogy, assessment and teacher education, and inspection and regulation via national standards and testing regimes.

The performativity agenda links child and teacher performance, regardless of the differential conditions that influence achievement gaps and equity gaps. Whilst such policies have been formulated to improve outcomes and promote accountability, some have had unintended negative consequences (Delandshere and Petrosky, 2004). Not surprisingly, there is evidence of resistance to some aspects of these policy technologies in England, USA, Canada and New Zealand, with unions playing a key role in mediating their reach and impact.

The findings from this study indicate that policy activity is needed across a number of areas in order to address equity in education. However, from a policy technologies perspective, national and international policy drivers may not consistently work together in order to achieve equity goals. The evidence indicates some tensions between monitoring of performance goals and monitoring of equity goals, as discussed in recent critiques of the school effectiveness paradigm (Gorard, 2010).

The former may focus on specific 'curriculum-focused' outcomes such as literacy and numeracy, which narrows the range of options available in other areas. Not only are some equity goals in education difficult to 'measure', they may also be difficult to achieve in isolation from other policy drivers (such as housing, health and nutrition, resource distribution).

The internationalization of policy-borrowing and policy-making has potential benefits and limitations. In a comparative study of education policy making between two UK countries (Scotland and England) and other EU countries, Grek and Ozga (2010) discuss the concept of 'policy soup' in which different stakeholders try out their ideas in a variety of ways:

The proposals that survive over a series of meetings, that meet several criteria, are technically feasible and fit with dominant values are translated into the domestic policy sphere in order to test their relevance to the national mood, their budgetary workability and the support they will receive. (2010: 947)

If social justice and equity matters are not part of the 'policy soup', then they will not become integral to the overall mix, perhaps because they are part of a wider ethical and moral commitment to what, and who education is for, rather than just technical matters. Furthermore, budgetary workability (especially in countries with declining public sector funding, or in countries with World Bank or substantial NGO funding) may be likely to dominate over less tangible issues as national mood and overall support for certain policy directions. The success of Finland's education system is based on an alignment

of societal, ethical and educational goals, as described by Halinen and Jarvinen (2008: 94) in the context of inclusive education:

First, the concept of inclusive education is based on the value choices a society makes. The Finns' underlying philosophy is that people have both rights and responsibilities in developing as human beings and contributing members of society. Securing a similar basic education for all requires making both mental and economic commitments to reaching that goal.

This comment indicates that trading-on of equity and quality is both possible and desirable, and is a means of using horizontal equity to achieve vertical equity. However, part of the ethical commitment in this context is to high quality teachers, with specialist expertise (where necessary), and with access to high quality teacher education. In contrast to the low-trust regimes of performativity and accountability, Halinen and Jarvinen argue that:

Teachers must be empowered to reach solutions based on both their expert estimation of students' needs and the local opportunities they see. Teachers must not be burdened with time- and resource-consuming tests, evaluations or inspections. Instead, they need high quality pre-service education and opportunities to continue their professional development through in-service training and networking with other teachers. (2008: 17)

In summary, horizontal equity has positive effects for all, and vertical equity might be seen as 'most desirable' in terms of raising quality for specific groups through specific mechanisms. Whilst resources (financial, material and human) have been identified in this study (and in the wider literature) as one of the key issues in achieving equity and ensuring quality in education, it would be erroneous to see this solely as an issue of 'costs' to public funding, or to individuals. Education is an investment, which has benefits for young people, and for society as a whole. In the context of global trends, it might be tempting to see the 'pay-off' from investment in education solely in financial terms, such as creating a better educated workforce, where all can contribute to economic progress. This is very much the rhetoric of neo-liberal and neo-conservative governments. However, the most tangible 'pay-off' must be to provide education for all, and to enhance equity for all, which entails a commitment to embedding equity goals in the policies of national and supra-national organizations, and refining the strategies through which these can be achieved.

4.4 Curriculum matters

There is some evidence from this study that the school curriculum may be implicated in sustaining inequities in relation to differentiation, cultural relevance, subject choices and the sustainability of special programmes. Traditional as well as new patterns of migration and settlement require changes in curriculum design and content and in teacher education in order to achieve cultural relevance as a means of ensuring equity. It can be argued that one of the main policy errors in policy directions of the last forty years (certainly in some developed countries in the minority world) is that governments have increasingly mistrusted professionals and sought hegemonic solutions to curriculum reform (the 'one size fits all' approach has been driven by school effectiveness studies). Universal notions of 'best practice' or 'effective practice' may fundamentally undermine opportunities for equity. In particular, the neo-conservative discourse of performativity creates a culture of blame, which potentially positions teachers as responsible for factors that are well beyond their control, and that operate at international as well as national levels (as evidenced in the matrix of 'achievement gaps' identified by Milner, 2010). However, where educational reform programmes are linked to wider social reforms, there may be increased capacity for reducing non-academic barriers to learning, and to place more value on the forms of social and cultural capital that children develop in their families and communities. Thus it can be argued that unions' goals and policies need to sustain their reach and impact beyond educational contexts.

It can also be argued that true equity is only likely to be realised if the (typically western) educational discourse breaks away from individualized concepts of ability and motivation, and recognises that these are socially constructed. In addition, there is much that teachers and others could do in a suitable resource and policy framework to raise outcomes for people who are positioned as 'less able', marginalized or disadvantaged, and therefore not able (or less likely) to succeed. It is mainly the professionals who are close to children (and often to their families and communities) on a day to day basis who can achieve the depth of understanding of these complex issues. However, additional support and training across all dimensions of diversity was identified as a strong equity issue in this study.

4.5 Teacher education matters

Some countries are continuing to improve teacher education, and to extend qualified teacher status across all phases, along with equitable pay structures (from preschool to the end of compulsory education). In the UK context, Kirk (2010) describes the characteristics of teachers for the 21st century, in terms of increasing and more complex demands on their professional knowledge, skills and dispositions. In contrast, neo-conservative

movements towards greater privatization of public education are freeing schools (such as Charter Schools in the USA, and Free Schools and Academies in England) from legal mandates around the employment and working conditions of teachers; the employment of para-professionals; and ensuring minimal inspection and quality assurance requirements. The threats to equity for teachers that are posed by government decentralisation, marketisation and privatisation of public education are detailed by Ball and Youdell (2009) and Kamushiro (2010). These trends may serve to undermine the goals of equity, equality and quality by privileging private (corporate) needs, and individual choice, rather than public good. A contrasting perspective is that decentralisation may free teachers from the constraints of some of the reforms of the last thirty years, and may enable them to regain some control of education, especially via curriculum design, pedagogical approaches, using technological innovations and incorporating multi-modal approaches to learning (artistic, technological, creative).

With reference to local and global agendas, there are areas of tension between global trends and discourses, particularly around standards, performativity, and country-level trajectories of development (Ball and Youdell, 2009). The global discourse privileges uniformity, on the assumption that if teachers are trained to specific standards, and will deliver curriculum goals to specific standards, then this will result in similar outcomes for young people (as measured via standardised test scores). Such reform movements do not recognise the diversity of students and their circumstances, and of the knowledge bases that teachers need to cater for different ways of learning and understanding. Delandshere and Petrosky (2004: 8) argue that a uniform ideal can only be coercive, in that it can only reflect the status quo – it is not open to debate and therefore excludes certain views.

Concerns about equity and diversity have emerged as central themes in this study. There are calls for greater understanding of the values, cultures and beliefs of Indigenous populations, as well as migrant groups. The survey and case studies demonstrate that just as dimensions of diversity intersect, so do dimensions of inequity and inequality. The findings indicate that increasing social and cultural diversity has implications for pre- and in-service teacher education programmes. It is not sufficient to include 'diversity' issues at a surface level: rather there is a need to include cultural and contextual diversity in teacher education, in relation to understanding child development and home-based child-rearing practices, to promoting cultural theories of learning, and to defining culturally relevant pedagogies and curricula. This applies to majority and minority world countries, for different reasons. In majority world countries, western discourses of child development have sometimes been privileged over local (country level) perspectives and issues, as exemplified by Pence and Nsamenang (2008) in African nations. In addition, with contemporary patterns of global migration

and settlement, as well as the needs of Indigenous communities, all teachers require knowledge of 'deep' rather than 'surface' cultures. Minority groups cannot be treated as homogenous or static, as there will be many variations within communities, as well as changes over time. It is also important for teachers (and unions) to understand the ways in which dimensions of diversity intersect, and how those intersections might exacerbate inequity (such as socio-economic status/ethnicity/gender). Where diversity is used as an umbrella term it can serve to homogenize groups, rather than revealing diversities within those groups. Thus more nuanced understanding of 'diversities within diversity' may be needed in order to refine unions' goals and policies around equity and quality.

4.6 Unions matter

There are continuing international demands for improving the quality of education, and setting more ambitious goals that will prepare young people for the complex demands of the 21st century. However, it can be argued that national policies, institutional practices and structural factors act in different ways to mitigate for or against equity for children and for teachers. The unions' responses have demonstrated their focus on human and children's rights as the basis for aspiring to and achieving greater equity and quality in their education systems. Unions' goals and policies in education (as well as in related areas such as health, social care, welfare) are an effective means of leveraging change, but there have to be pragmatic adjustments between trading-up and trading-off equity matters. Trade-offs may occur across all areas of the education system. Dynamic and shifting social, political and economic agendas also influence the extent to which unions can sustain holistic rather than fragmentary approaches.

In addition to equity matters being ongoing aspirations in unions' and/or governments' policies, it is also pertinent to remember the matrix of achievement gaps identified by Milner (2010), which have been re-asserted in this study as equity gaps. This matrix indicates that some aspects of equity in education are reliant on equity in other areas of social policy (such as housing, welfare, health). The work of teacher unions is sometimes seen as defending the special interests of teachers. However, the scope and remit of their policies and activities, indicates shared advocacy for teachers, children and parents, across all stages of education. Thus equity is a consistent value in unions' goals and policies, but at a broader societal level, these are difficult to implement and achieve. Because teacher quality broadly underpins educational equity and quality, it may be that achieving horizontal equity for teachers is not an adequate basis for addressing the achievement and equity gaps discussed here. Horizontal equity may be the pre-condition for developing vertical equity through specialized training, additional qualifications, and salary and career progression incentives. Specialized training and

qualifications may also need to be developed for those teachers who come from within minority communities so that they can work effectively, and with the requisite knowledge to provide culturally-responsive educational programmes. These recommendations are consistent with the model of horizontal and vertical equity, developed in Chapter 1, from the work of Brown (2006).

This study has contributed to understanding the complex interplay of different historical and socio-cultural contexts and structural dynamics that influence equity, equality and quality in the education systems of different countries. That equity matters for children and for teachers is indisputable. Education is seen as being a social benefit, and not just a commodity. Education can and does contribute to social justice through the commitment of professional teachers, and their national unions and federations. The evidence from the Equity Matters study proposes that this commitment needs to be nurtured and sustained in light of contemporary changes and challenges. What remains at stake is how unions can continue to work effectively towards achieving greater equity for teachers and for children, with the support of Education International.

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APPENDIX 1

Below are the unions that participated in the country-wide questionnaire. Those countries that participated in the case studies are indicated

Country	Union	Acronym	Case study
Australia	Australia Education Union	AEU	
Canada	Canadian Teachers' Federation	CTF	<input checked="" type="checkbox"/>
Cyprus	Association of Teachers of Technical Education Cyprus	OLTEK	
Cyprus	Cyprus Turkish Secondary Education Teachers' Union	KTOEOS	
Denmark	Danish Union of Teachers	DUT	
France	Syndicat national des enseignants de second degré	SNES-FSU	
Germany	Gewerkschaft Erziehung und Wissenschaft	GEW	
Ghana	Ghana National Association of Teachers	GNAT	
Ireland	Association of Secondary Teachers Ireland	ASTI	<input checked="" type="checkbox"/>
Ireland	Irish National Teachers' Organisation	INTO	
Ireland	Teachers' Union of Ireland	TUI	
Israel	Israel Teachers' Union	ITU	
Kenya	Kenya Union of Domestic, Hotels, Educational Institutions, Hospitals and Allied Workers	KUDHEIHA	
Liberia	Association of Liberian Professional Organizations	ALPO	
Lithuania	Christian trade union of education workers	CTUEW	

Country	Union	Acronym	Case study
Malaysia	National Union of the Teaching Profession	NUTP	
Malta	Malta Union of Teachers	MUT	
Morocco	Maroc Syndicat National de l'Enseignement Supérieur	SNESup	
Netherlands, the	CNV Onderwijs	CNV-O	
Nevis of St. Kitts and Nevis	Nevis Teachers' Union	NZEI <i>Te Riu Roa</i>	
New Zealand	The New Zealand Education Institute	NZPPTA	<input checked="" type="checkbox"/>
New Zealand	New Zealand Post Primary Teachers' Association	UEN	<input checked="" type="checkbox"/>
Norway	Union of Education Norway	ZNP	
Poland	Polish Teachers' Union / <i>Związek Nauczycielstwa Polskiego</i> (with additional response from the National Science Section NSZZ Solidarność)		<input checked="" type="checkbox"/>
Slovakia	Independent Christian Trade Union of Slovakia	ZPŠaV NKOS	
Sri Lanka	All Ceylon Union of Teachers	ACUT	
Sweden	Swedish Teachers' Union	<i>Läraryrbundet</i>	
Switzerland	Union of Public Service Employees / Schweizerischer Verband des Personals Öffentlicher Dienste	VPOD	
United Kingdom	National Association of School-masters Union of Women Teachers	NASUWT	
Zambia	Zambia National Union of Teachers	ZNUT	<input checked="" type="checkbox"/>

Plus pilot questionnaires from unions in Poland, South Africa and USA.

APPENDIX 2 : COUNTRY-WIDE QUESTIONNAIRE

Equity Matters in Education



Education International
Internationale de l'Éducation
Internacional de la Educación

This survey of Teachers Unions worldwide by the Graduate School of Education, University of Exeter seeks to answer these key questions:

1. How do education unions conceptualise equity and equality in education?
2. How are these concepts operationalised, as evidenced in union policies?
3. What are the issues for teachers, with regards to implementation of these concepts in their practice?
4. How can Education International contribute to international debates on equity and equality in ways that benefit members?

The Survey has four general themes:

1. Contextual information
2. Union's concepts, goals, policies
3. Country-specific factors regarding equity issues
4. Implications for EI goals and policies

You can save your survey at any time and get back to it.

Thank you for your time in contributing to our work.

1. Contextual information

Name of Respondent :

Gender (*Choose one of the following answers*)

- Male Female No answer

Position in Union :

Name of country:

Name of national teacher union :

What level/sector of education does the union represent?

Check any that apply

- Pre-primary
- Primary
- Secondary lower
- Secondary higher
- Vocational
- Higher education

How many members does your union have?

Only numbers may be entered in this field

What percentage/proportion are males approximately?

What percentage/proportion are females approximately?

Only numbers may be entered in this field



Who provides education in your country?

Please tick all those that apply and indicate the percentage of provision from this source in the box alongside each option that you tick e.g, state sector central 50%, state sector province/regional 40%, private 10%. The percentage is for amount of provision not percentage of pupils.

If this model does not fit your country's provision please describe it in the text box below this question.

If it is easier please send relevant attachments to PTSNash@exeter.ac.uk

Check any that apply

State sector central

State sector province/regional

Local/municipal

Private

Faith (religious/denominational sources)

Voluntary (other charitable sources)

Other:

Please describe your model of provision if it is not covered adequately by the above question.

.....
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2. Your union's concepts, goals and policies.

Could you please give your union's policy statement(s) on equity below.

If there are no such policy statements could you please outline your union's viewpoint on equity matters.

Which equity issues are included in union and/or government policies and which have been implemented in practice?

Tick the one that applies for both union and government policies.

	Not in Union polices	In union policies but not recommended to government yet	In union policies and recommended to government	Not sure	Not in government policies	In government policies but not implemented as yet	In government policies and implementation ongoing	Not sure	N / A
1. Equity of educational access.i.e. all students have access to every phase of compulsory schooling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Equity of educational outcomes i.e. all students have equal opportunities to achieve positive outcomes from their schooling.					<input type="checkbox"/>				
3. Equity of educational resource distribution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Equity for students of all socio- economic backgrounds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Equity for students of all genders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Equity for students of all cultural ethnic backgrounds.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Equity for students with physical disabilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Not in Union policies	In union policies but not recommended to government yet	In union policies and recommended to government	Not sure	Not in government policies	In government policies but not implemented as yet	In government policies and implementation ongoing	Not sure	N / A
8. Equity for students with learning disabilities					<input type="checkbox"/>				
9. Equity across all geographical areas e.g. rural and urban	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Equity for teachers in terms of career opportunity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Equity for teachers in terms of conditions of service.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Equity for teachers in terms of job security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Equity for teachers in terms of pay and the phase of education taught.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Equity for teachers in terms of pay and gender	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Equity for teachers in terms of pay and level of qualifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please add any other equity issues included:

1. In your union policies indicating if they have been recommended to government.
2. In your government policies indicating if they have being implemented or not.

.....

.....

Looking at the 15 areas above, please identify the 3 which are the most important in your union's policies relating to students.

Check any that apply

- 1.
- 2.
- 3.

Please give explanations as to why these are important for student outcomes.

.....

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Looking at the 15 issues again, please identify the 3 which are most important in your union's policies relating to teachers.

- 1.
- 2.
- 3.

Please give explanations as to why these are important for teacher's careers.

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Are your country's union and government policies publicly available?

Choose one of the following answers

- Yes Not sure No No answer



If yes, please give details of how they can be accessed e.g website details and address.

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Are there any barriers to achieving equity in your country's education system? e.g. lack of government funding to provide compulsory education for all children or lack of transport to schools?

- Yes No No answer

If so, please give examples

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.....
.....
.....

What do you think are the main inequities in your country's education system? e.g.unequal access to provision, urban versus rural issues, gender issues.

1.
2.
3.
4.
5.
6.



Please can you give examples of these inequities. Please send attachments if more convenient.

.....
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Has your union influenced government actions on any inequities in your country's education system? Choose one of the following answers.

- Yes Not sure No No answer

If Yes please give examples.

Could you please outline their impact on your education system.

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What are the 3 main goals which your education system should achieve in order to ensure equity?

1.
2.
3.



Please could you give examples for all these 3 responses above.

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Which of the aspects of equity in education listed below does your union's policies include?

	Yes	Yes to some extent	Not at all	No answer
1. Students with physical disabilities should be integrated into regular/mainstream classrooms.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Boys and girls should have equal access to all phases of compulsory schooling.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Students of all cultural and ethnic backgrounds should have equal access to all phases of compulsory schooling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Students of all socio economic backgrounds should have equal access to all phases of compulsory schooling.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Resources should be distributed equally across the country per capita of student population.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Teachers should have equal pay structures across all phases of compulsory schooling (pre school, primary, secondary).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Teachers in the different phases of compulsory schooling should have the same status.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Yes	Yes to some extent	Not at all	No answer
8. Teachers should receive different pay according to performance-related indicators (e.g. student learning outcomes).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Students with learning disabilities should be integrated into regular (non specialist) classrooms.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Students of different cultural and ethnic backgrounds should be enabled to receive education in their home language.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. More government funding should be available to support parental choice of school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Teachers in the different phases of compulsory schooling should have the same level of qualifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Students from different religious groups should be able to attend schools which respect their diverse beliefs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. All phases of compulsory schooling (e.g pre school, primary, secondary) should be equally resourced per capita of the student population	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please add any comments about any of your responses to items 1-14 in the Box below

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Here are some statements relating to outcomes for students and teachers in compulsory schooling. Please indicate your union's agreement or disagreement to these on the Likert scales provided

	Strongly agree	agree	Un-decided	Dis-agree	Strongly disagree	No answer
1. Students with physical disabilities will achieve poorer outcomes in special separate schools.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Girls do not benefit from accessing all the phases of compulsory schooling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Students from all religious groups have the same outcomes from compulsory schooling because it respects all their beliefs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Access to all phases of compulsory schooling improves the outcomes for all children from low socio-economic backgrounds.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Children who attend fee paying schools achieve better outcomes than those in state funded schools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Students achieve poorer outcomes in rural schools because of the lack of educational resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Equal pay structures for teachers across all phases of education leads to better outcomes for all students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Equal status for teachers across all phases of education leads to better outcomes for all students.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Students with learning disabilities will achieve better outcomes in special separate schools.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Separate education for boys and girls achieves better outcomes for both sexes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Strongly agree	agree	Un-decided	Dis-agree	Strongly disagree	No answer
11. Equal pay structures for teachers across all phases of education leads to better quality teaching in all phases of education.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Students from some cultural and ethnic backgrounds have poor outcomes from schooling because it does not respect their home and community cultures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please add any comments you may have to your responses to items 1-12 above in the Box below or send relevant attachments.

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3. Country-specific Factors regarding Equity

What are the main constraints for your country in achieving equity for students and teachers in practice? Please indicate on the Likert scales the degree of importance of each possible constraint listed. Use the nimportant end of the scale if these constraints are not an issue in your country.

A. Teacher Education and Development

	Very important	Important	Neither important or Unimportant	Unimportant	Very unimportant	No answer
Access to quality initial teacher training for all phases of compulsory schooling.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to quality in-service teacher training for teachers across all phases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The same level of initial qualification for teachers across all phases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunities for career progression across all phases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunities for peer learning and collaboration across all phases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

B. Conditions of Service

	Very important	Important	Neither important or Un-important	Un-important	Very un-important	No answer
Pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working conditions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Status of teachers in society	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

C. Working Practices

	Very important	Important	Neither important or Un-important	Un-important	Very un-important	No answer
Lesson preparation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Administrative work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Timetable for teaching	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Testing and assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to support staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to educational resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

D. Student Population

	Very important	Important	Neither important or Un-important	Un-important	Very un-important	No answer
Number of students in class	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Age range of students in class	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability of students in class	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Diversity of students in class (race, ethnicity etc)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discipline/anti-social behaviours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

E. Classroom Conditions

	Very important	Important	Neither important or Un-important	Un-important	Very un-important	No answer
Adequate classroom spaces	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to educational books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to computers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to writing materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to other teaching aids e.g. games, T,V, interactive whiteboards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please add any other constraints not listed above which are very important or important.

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4. Implication for Education International's goals and policies

What role can Education International play in helping you to achieve your goals in your country with regard to equity?

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What role can Education International play in promoting goals for equity at an international level?

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Please add any further comments you feel are relevant to the aims of this survey.

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If you would be happy to be interviewed about your responses please give your best contact details below.

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.....

Thank you for your cooperation and time in completing this survey, we are very grateful.

Prof. E Wood, Assoc. Prof.K. Postlewaite
Dr.M. Levinson, Tricia Nash.
Graduate School of Education, University of Exeter

Guntars Catlaks, Senior Coordinator
Mireille de Koning, Professional Research Assistant, Education International.

APPENDIX 3: CASE STUDY QUESTIONS

Generic

1. With reference to your government's policies, to what extent is equity regarded as an intrinsic feature of the quality of education?
2. In what ways are government policies used to enforce equity (e.g. through the measurement of teacher performance, school effectiveness criteria, targeted resource provision, CPD)?
3. Are there any specific trends or influences in your country which may undermine equity goals in education?
4. Are there any specific trends or influences in your country which may enhance equity goals in education?
5. Are there any current targets in your country to improve equity for teachers? For children?
6. What are the main means of delivery for these targets (e.g. curriculum policies; accountability via testing, teacher appraisal; teacher training and supply; teacher remuneration)?
7. All country respondents identify a lack of equity for disadvantaged groups in their societies. Please can you comment on which groups in your country are more or most disadvantaged, and why.
8. Are there any incentives to recruit teachers from minority groups?
9. Are there any incentives for teachers to work with minority groups (e.g. through strengthening professional development; using a multi-cultural or anti-bias curriculum)?
10. What are the main issues around resource allocation? Is resource allocation based on needs (at individual school-level), on local area, or regional priorities?

Country specific

11. In your country, which aspects of equity in education are becoming more important?
12. In your country which aspects of equity are becoming less important?
13. Give examples of policies or programmes which are good examples of addressing equity in education.
14. What, in your view, would be the outcomes of an education system that fully addressed the issue of equity?
15. What, in your view, would be the outcomes of an education system that failed to address the issue of equity?
16. What steps should be taken to make the education system in your country more equitable?
17. For each example, please indicate who has prime responsibility for taking this step (e.g. government; unions; educational administrators; head teachers / principals; teachers; parents; students)

APPENDIX 4 :

AUSTRALIAN EDUCATION UNION – STATEMENT ON EQUITY

1. INTRODUCTION

- 1.1. The AEU supports public schooling. Public schools and public school educators provide an inclusive and comprehensive environment in which all students are welcome, in which their special needs are recognised and met, and in which each student is supported to develop to his or her maximum potential regardless of cultural, social, economic, ethnic background, gender, sexual preference or personal circumstances.
- 1.2. It is important that disadvantage is recognised as a community issue affecting whole schools. Programs designed to address disadvantage should be aimed at building community capacity to improve outcomes for students
- 1.3. Within this context the AEU recognises that there are many schools that need additional resourcing in order to provide their students with the same opportunities as students in other schools.
- 1.4. It is therefore imperative that funding address disadvantage on a whole school, community, and system basis, with greater resourcing going to those schools in greatest need.

2. POVERTY AND EDUCATION

- 2.1. Socioeconomic disadvantage is a key factor that overarches and exacerbates other problems of inclusive practice and therefore must be addressed as a priority to achieve equality of outcomes for all students.
- 2.2. The AEU acknowledges that poverty and disadvantage are matters that originate outside of school, but that the nature of schooling can either increase or decrease inequality.
- 2.3. The AEU supports curriculum, pedagogical and educational practices that lead to greater access and equity for all students, which reject the exclusion and alienation of any students, and which recognises the importance of high expectations.
- 2.4. It will work with and support community organizations that are seeking to alleviate poverty in the community. In particular it will continue to support and contribute to the work of the National Coalition Against Poverty (NCAP).

3. RESPONSIBILITY AND FUNDING

- 3.1** The AEU notes as an improvement the principles of funding expressed by MCEETYA at its meeting in Auckland in July 2002, which give greater primacy to public education and call for a collaborative partnership between the states and territories and the Commonwealth in funding. It notes that these were endorsed by all states and territories, but not by the Commonwealth.
- 3.2** Commonwealth and state or territory governments must give greater priority to equity and disadvantage in funding decisions and work in partnership with each other, teacher unions and the teaching profession to achieve equity for Australian children.
- 3.3** The Commonwealth government should increase its role as a funder of initiatives and programs designed to create greater equity in Australian society.
- 3.4** It should resume funding for the Australian Center for Equity Through Education.
- 3.5** The AEU asserts that issues of disadvantage are inherently part of all funding and policy decisions and supports the idea of an "Equity impact study" for major educational decisions made by governments. Schools should also consider the impact on poverty and disadvantage in all decisions.
- 3.6** Within a context where schools are given the flexibility to find the most appropriate solutions, departments must accept responsibility for the situation overall. It cannot be left to individual schools to decide whether equity is an issue for it, and whether it gives priority to programs to counter disadvantage.
- 3.7** All jurisdictions should have a comprehensive and coordinated plan to tackle disadvantage and inequity through education. There should be clear responsibility for matters of equity in all education departments.
- 3.8** Some matters of equity and disadvantage are best dealt with by giving schools extra funding for the particular profile of student need in their school, as in the case of specific disabilities. The AEU also strongly reaffirms that in many circumstances disadvantage is a community issue and that the collective resources of the community are an important consideration in dealing with equity. There is therefore an ongoing need for programs that target schools and their communities that are collectively experiencing disadvantage.

4. CHARACTERISTICS OF DESIRABLE PROGRAMS

4.1. School programs designed to alleviate disadvantage and create greater equity are likely to have the following characteristics:

They are directed at schools where disadvantage is greatest.

They focus on capacity building and enabling at the school level.

Financing is sufficient to make a substantial difference to the school, and sufficiently ongoing to allow at least medium term certainty.

They provide resources which can be used flexibly through school and community based decision making.

The objectives, targets and outcomes are explicit, measurable where appropriate, and broad enough to tackle fundamental and ongoing issues that may not be susceptible to measurement.

The school works cooperatively with other schools, government and community departments and agencies.

They focus on improving outcomes for students.

They engage teachers, parents and other education staff in the development of programs.

They are focussed on the whole school.

4.2 Whilst each school must be given the opportunity to decide its own solutions to its own problems, the following areas should be targets for expenditure: Reduced class size with a priority for disadvantaged schools; Public early childhood facilities; Early problem identification and additional support in literacy and numeracy; Provision of additional teacher support; Additional staffing to provide time for parent, community and interagency liaison; Additional promotion positions with a focus on welfare; Additional time for induction and mentoring; Additional time for teachers to meet, and for counselling of students; Professional development in relation to behaviour management and changed pedagogies.

4.3. Within a context which provides adequate funding and staffing levels and does not further increase workloads, and where agreement is reached between the relevant Branch or Associated Body and employing authority, the AEU will support initiatives which have the potential to increase equity and lessen disadvantage. Potential areas for further work include: Curriculum/school change; Middle years schooling; Appropriate pedagogies; Full service schools (including related health issues); Alleviation of disadvantage; The role and delivery of VET in schools, and other matters related to the relationship between school and work; Funding of school based initiatives; Sectoral inequalities (EC, Primary, Secondary, etc.); Targeted Resources for Special Programs; Student welfare and behaviour management; Whole of school mapping and tracking of whole of student issues;

Congruence between home and school in development of integrated programs;
The use of targets, and their relationship to other assessment and reporting issues;
The importance of teacher recruitment, training and induction.

- 4.4.** The AEU supports the idea of pilot projects in a number of these areas. In particular, it believes it is time for Commonwealth and state/territory governments to initiate well-funded and researched projects in the area of full service schools. This Charter should be read in conjunction with other AEU policies, including, (but not limited to): Aboriginal and Torres Strait Islander Education (2002); Anti Discrimination (1989); Combating Racism (1987); Early Childhood Education Policy (2003); Education in Rural Areas (1989); Elimination of Sexism in Education and Employment (1988); Gender Equity (2002); Sexual Orientation and Gender Preferred Identity (1995); Special Education (1987); and, Students with Special Needs (1996).

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