

Alistair Ross *Editor*

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# Educational Research for Social Justice

Evidence and Practice from the UK

# Education Science, Evidence, and the Public Good

## Volume 1

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Alistair Ross

Editor

# Educational Research for Social Justice

Evidence and Practice from the UK

 Springer

*Editor*

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# Preface

My colleagues and contributors started work on this volume in the early summer of 2019. We completed the final editing of our copy in late March 2020, and the checking of proofs in December. The times had changed, and the messages in our chapters have acquired an unforeseen and dramatic resonance as a consequence of the COVID-19 pandemic.

Firstly, expertise based on systematic and thorough research is critical in supporting the making of policy for the public good. Our messages are about the importance of this in education: but they apply with even greater import in other areas of policy, such as public health. There is a need to consider the dispassionate and considered arguments of researchers' expertise in policy-making circles: the experts may not always agree, but policy-makers have a duty to act in the public interest to understand and evaluate the evidence. Researchers have an obligation to investigate with the public interest in mind, and to report openly in clear language what they find. Equally, policy-makers always have a responsibility to take heed of the evidence.

Secondly, we need to agree on what constitutes public interest. We argue in these chapters that we cannot simply rely on the aggregation of individual desires, but have to consider the good of all people, across the globe, of each and every one of them. We argue here that research suggests that the neo-liberal order in the United Kingdom in many instances fails to provide education services for the public good. A similar message can be seen today – with dramatic clarity – with respect to public health services across the world. The early seventeenth-century English poet, John Donne, expressed this well.

No man is an island,  
Entire of itself.  
Each is a piece of the continent,  
A part of the main.  
...  
Each man's death diminishes me,  
For I am involved in mankind.  
Therefore, send not to know  
For whom the bell tolls,  
It tolls for thee.

London, UK  
30 March 2020

Alistair Ross

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I am very grateful to all the contributors of this book, who worked together as a team, commenting on each other's writing and making suggestions to help develop and polish each other's work. I am especially grateful to the efforts of Merryn Hutchings and Ian Menter, who took on particularly heavy critical roles, specifically Merryn for her scrupulous and thorough checking and proofing.

We are also grateful to our editorial and publishing team at Springer, and to the series editors, who have seen this book through to production in times and circumstances that have been unprecedented in modern times.



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# The Education System in England and Scotland

*Alistair Ross and Sarah Minty*

Many of the chapters in this book relate to the educational structures and systems found in the United Kingdom (UK), particularly those of England, and sometimes of Scotland. This section offers an outline description of these, and the ways which we will refer to it in this book. Table 0.1 gives figures for educational establishments and student numbers for each of the four countries in the UK.

Most education is provided by the state, but there is in England a system of private education that constitutes about 5.5% of pupils under 16, and 14% of 16–18-year-olds. While many private schools confusingly call themselves ‘Public schools’ or ‘independent’ schools, we will refer to them here as private.

The curriculum is established differently in each of the four countries, and is arranged by subjects. Where details of the curriculum are relevant to a particular chapter, details are given, but no overall synopsis is provided here.

In **England**, education is the responsibility of a Department of State, the title of which has changed six times over the past 40 years (see Table 0.2). (Universities have been largely the responsibility of the same Department up to June 2007<sup>1</sup>, when they became part of the responsibility of a new Department of Innovation, Universities and Skills, which was changed to become a Department of Business and Skills 2 years later. Within this a specific Minister of State focussed on the Universities brief. In May 2015, Universities were returned to the Department for Education, since when they have had a series of six appointments of Ministers of State for Universities (though only four individuals)) (Table 0.2).

State schools are commonly divided into primary schools, that run from 4 years old to 11, and secondary schools, from 11 to either 16 or 18. Secondary schools are generally comprehensive (mixed ability) in their intake, but in some areas (about 5% of the total) there are selective grammar schools with an entrance examination (known as ‘the 11 plus’), and most private schools have some form of selection. Both primary and secondary schools are either Academies, Free Schools on under

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<sup>1</sup>Responsibility for some research funding was transferred to a separate Office of Science and Technology in April 1992, where it remained until subsumed into the new Department of Innovation, Universities and Skills in 2007

**Table 0.1** Numbers of schools and students in different countries of the UK

		England	Scotland	Wales	Northern Ireland
Primary schools	<i>Institutions</i>	17,200	2,500	1,400	900
	<i>Students</i>	2,330,000	194,000	135,000	90,000
Secondary schools	<i>Institutions</i>	3,400	360	210	200
	<i>Students</i>	1,604,000	140,000	90,000	76,000
Further education/sixth forms	<i>Institutions</i>	350	20	15	5
Special schools	<i>Institutions</i>	1,040	140	40	40
	<i>Students</i>	31,000	2,000	1,000	2,000
Private schools	<i>Institutions</i>	2,300	100	70	14
	<i>Students</i>	284,000	29,000	5,000	3,000

Sources: Department for Education (2017) Education and Training Statistics for the United Kingdom. London: DES. Table 1.1; Scottish Council of Independent Schools (2018) <http://www.scis.org.uk/facts-and-figures/>

Local Authority control: Academy and Free schools have greater independence, and greater business, religious denominational or parental control than Local Authority schools. Current policy is to make Local Authority schools become Academies if they are judged to be failing. Students take national assessment tests in the years in which they are 7, 11 and 14. At 16 students normally take national General Certificate of Education courses in a range of subjects (usually at least five, including mathematics, English, double science and a humanities subject). Education is compulsory to 18, but schooling only until 16. Post 16 education can be at school, sixth form college or a further education college to age 18, when students undertake Advanced ('A') Level examinations in normally two to four subjects, or alternatives such as Business and Technology qualifications, International Baccalaureate, or Apprenticeship qualifications. All state-funded schools are regularly inspected by the Office for Standards in Education (Ofsted), who publish reports on the quality of education of each school. Schools judged by Ofsted to be inadequate may be subject to special measures (such as replacing the governing body and senior staff, and becoming an Academy).

In **Scotland**, education has been devolved to the Scottish Government since 1997. State secondary schools are comprehensive in organisation, and have a range of names, such as High Schools, Academies, Secondary Schools, Grammar Schools, Junior High Schools and Colleges, but these do not signify any substantial difference in organisation, provision or status. There is a tradition of universal public education, with a significantly smaller proportion of private education than in England (although around a fifth of students in the City of Edinburgh attend independent schools). Inspections of educational standards are conducted by the Scottish Care Inspectorate (pre-school provision) and Education Scotland for schools.

Formal testing for primary pupils was introduced in 2017/2018, as part of a raft of changes related to the National Improvement Framework for Scottish Education in an attempt to tackle the attainment gap between pupils from disadvantaged backgrounds and their more advantaged peers. Scottish National Standardised

**Table 0.2.** Administration of education (schools) in England, 1980–2020

Department dates	Name of Department	abbrv	Secretary of State	appointed	Governing party <i>Prime Minister</i>
(1964) – 14 April 1992	Department of Education and Science	DES	Mark Carlisle	5 May 1979	Conservative <i>Margaret Thatcher</i>
			Keith Joseph	14 Sept 1981	
			Kenneth Baker	21 May 1986	
			John MacGregor	24 July 1989	
			Kenneth Clarke	2 Nov 1990	Conservative
15 April 1992 – 19 July 1994	Department For Education <sup>a</sup>	DFE	John Patten	15 April 1992	<i>John Major</i>
20 April 1994 – 7 June 2001	Department for Education and Employment	DfEE	Gillian Shephard	20 July 1994	
			David Blunkett	2 May 1997	Labour
8 June 2001 – 27 June 2007	Department for Education and Skills	DfES	Estelle Morris	8 June 2001	<i>Tony Blair</i>
			Charles Clarke	24 Oct 2002	
			Ruth Kelly	11 Dec 2004	
			Allan Johnson	5 May 2006	
28 June 2007 – 11 May 2010	Department for Children, Schools and Families	DCSF	Allan Johnson	28 June 2007	Labour <i>Gordon Brown</i>
12 May 2010 – (2020)	Department for Education <sup>a</sup>	DfE	Michael Gove	12 May 2010	Conservative-Liberal Democrat coalition
			Nicky Morgan	15 July 2014	<i>David Cameron</i>
			Justine Greening	8 June 2015	Conservative <i>David Cameron</i>
			Justine Greening	14 July 2016	Conservative
			Damian Hinds	8 Jan 2018	<i>Theresa May</i>
			Gavin Williamson	24 July 2019	Conservative <i>Boris Johnson</i>

Sources: to November 2017, Mortimore, Roger and Andrew Blick. (2018); thereafter, Wikipedia

<sup>a</sup>Note that the title of the Department of State responsible for education changes, but had the *same* title between 1992 and 1994 and from 2010. To distinguish them, we have used a capital F for the earlier Department, in both the full name and the abbreviation, and a lower case f for the later Department

Assessments are taken at age 5, 7, 11 and 15 (in P1, P3, P7 and S3). Traditionally, Scottish secondary education has been characterised as emphasising breadth across a range of subjects, unlike the rest of the UK, where there is a greater depth of education over a smaller range of subjects. However, the implementation of New National Qualifications in 2014 alongside the new Curriculum for Excellence have led to concerns of curriculum narrowing (Education and Skills Committee, 2019). The majority of students now sit six or seven National 4 and 5 qualifications (replacing the traditional eight Standard Grade qualifications) taken in S4 (age 16), before progressing to Highers at age 17 in S5. Most students go on to sit further Highers in S6 (age 18), while some also take Advanced Highers, considered to be equivalent to Scottish first-year degree programmes.

Across *the UK as a whole*, pupils are divided into age cohorts, and there are very few examples of pupils being held back or advances into a different year group. However, the year groups are described locally in different ways: through this book we will simply use the age of the pupil, in order to offer clarity for the international reader.

## Chapter 1

# What do educational science and the public good mean in the context of educational research for social justice?



Alistair Ross 

**Abstract** This book has been written by a group of researchers who worked together variously over 2000–2015, who broadly share a commitment to educational research that leads to social justice. This introductory chapter sets out what we understand social justice to mean, and how this gives a particular connotation to the terms ‘educational science’ and ‘the public good’. We share the same approach to the nature of educational policy research and its purposes, namely that it should be designed and conducted with the intention of illuminating or having an effect on public educational policy, and that this effect should be generally to counter the inequalities between the treatment and outcomes of different social groups within society, whether those groups were determined with respect to class, gender, ethnicity, disability, and other social categories. These values, we argue, are central and critical components of our professional and intellectual research and judgments. They contribute to what we conceive of as the public good: a society in which structural inequalities are minimised; where diverse identities are valued; outcomes (educational and other) for individuals and groups are broadly equal; all individuals are valued and have agency; and all members of society are engaged and empowered.

## Our purposes

This book has been written by a group of researchers who worked together variously between 2000 and 2015, who broadly share a commitment to educational research that leads to social justice. Our joint work was in a single research institution – the Institute for Policy Studies in Education (IPSE) – based in London Metropolitan University (UK), which collaborated with researchers across the UK and Europe, some of whom contribute here. Most of our work was funded by

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policy-oriented institutions, who commissioned research to meet particular briefs; some work was investigator-led, funded by research councils and foundations. We were established and developed as a research institute with a specific focus on contributing to social justice and equity in educational policy. We are thus a group of scholars who share the same approach to the nature of this kind of educational research and its purposes, namely that it should be designed and conducted with the intention of having an effect on public educational policy, and that this effect should be generally to counter the inequalities between the treatment and outcomes of different social groups within society, whether those groups were determined with respect to class, gender, ethnicity, disability, etc. This chapter sets out what we understand the terms social justice and equity to mean, and how this gives particular connotations to the terms ‘evidence’, ‘educational science’ and ‘the public good’.

We begin by setting out our objectives in writing this volume. We intend to justify a particular perception of knowledge and understanding of educational enquiry and research, examining through practical examples its foundations, validity and limits, based on the values of social justice and equity which we acknowledge in our approaches to educational inquiry, to our analysis and findings. These values, we argue, are central and critical components of our professional and intellectual research and judgments. They contribute to what we conceive of as the public good: a society in which structural inequalities are minimised, in which diverse identities are valued, and the outcomes (educational and other) for groups are broadly equal. All individuals are valued and have agency, and all members of society are engaged and empowered.

Secondly, we set out our understanding of social justice and equity, particularly as they affect educational policies and practice in the settings and contexts in which we work. This is based on a critique of the ways in which educational ‘efficiency’ is seen to trump equity in policy-making. We challenge the promotion of educational institutions as participants in the competition of league tables, and of individual learners in a zero-sum game of meritocracy. We argue that these are based on instrumental views of education and a human capital model of education that essentialises, commodifies and values a particular form of education that is underpinned by neoliberal ideology.

Thirdly, we examine how such an understanding impacts on the meaning and nature of educational science. Educational practice is contingent and contextual, taking place through a myriad of social interchanges between learners and learners, and teachers and learners. Their circumstances and settings mean that they are not necessarily reproducible, and are thus not part of those branches of science that require results to be replicated. Our scientific approach to education recognises this, and seeks to examine and describe the constraints of particular kinds of data, and to use this to both qualify and illuminate our analysis. The social construction of social structures and processes means that terms and categories are imprecise and may be understood in a variety of ways: the quantification of social categories needs to be approached with caution (and is not infrequently used by the state as a means of control and surveillance); but they can nevertheless be used in educational research

in a heuristic manner. We also recognise and try to account for structural inequalities in our research approaches.

Fourthly, we consider how our understanding of social justice influences our construction of the public good. We question whether and to what extent state institutions – even in those countries that profess to be liberal democracies – can be seen as necessarily in a position to define the public good. The way in which such states have embraced international competitive league tables of ‘educational performance’ illustrates how the notion that education should be based around individual needs and aspirations has been overtaken by an assumption that league table success will lead to improved economic outcomes. Such expectations were evident to us when we undertook the researches we describe in this book, and our critical distancing from such assumptions was evident in our analyses, even where we were commissioned by those who held these positions. There are many very germane examples of this in current UK government policies in education, most notably in England.

The emphasis on equality of opportunity over equality of outcomes is, we believe, used to justify social inequalities by victimising weaker social groups and constructing them as the authors of their own misfortunes. Our research tries to identify structural inequalities and point to their significance in educational outcomes, and is based on the premise that, if there are inequalities between groups, there should be a presumption that there are institutional prejudices behind this, at school and policy levels, and in wider society (albeit possibly unwitting and unintended prejudices).

We then briefly describe our own institutional setting, focusing particularly on the processes by which we operated. How we developed our research practice, how we recruited, and how we operated: all of these may help the reader understand how and why we believe that using educational research in the ways we describe can contribute to specifically democratic, humanistic and values-based educational development for individuals, groups and societies. As an institute that explicitly focused on educational policy, and that was dependent on commissioned funding from policy-making bodies, our focus inevitably was primarily directed at educational institutions and structures, rather than the learning that takes place in informal contexts: however, we did sometimes research the inequalities that occur in such settings, for example, in Fretwell (Chapter 5, 2021), Ross (Chapter 12, 2021b) and some of the material in Hartsmar et al. (Chapter 13, 2021). We conclude this Chapter with an outline of the structure of the book and the individual contributions within it.

## **Towards a social justice axiology of education research**

The intention of this book is to challenge what we see as the dominant epistemological norms of educational policy research in the neoliberal context, and to offer some steps towards the re-definition of what might constitute ‘the public good’ that stress the values of social justice and equity rather than the mere summation of each

individual member of society's conception of 'good'. What are the characteristics of educational research that contribute to our understanding of social value? Some of our IPSE colleagues have previously considered 'what would a socially just educational system look like' (Francis and Mills 2012; also Reay 2012). Here we consider the same question as applied to educational research.

There has been a long and consistent literature that shows how education systems serve to reproduce and perpetuate social inequalities, from Stan Bowles and Herb Gintis (1976) outlining the correspondence between the practices of schooling and the labour requirements of capitalist production, through Pierre Bourdieu and Jean-Claude Passeron's (1990 [1970]) work *La Reproduction*, to the work of Stephen Ball (1994, 2003) and Diane Reay (2017) on social class and education. Inherent in all of these is not simply a *description* of inequality, but an insistence that policies be devised to *change* this. There has been an equally distinguished – though less voluminous – literature on social justice in education and educational research. The contributions in Morwenna Griffiths (2003) explored the tensions between striving for and implementing equality while also acknowledging individual and group differences. Carol Vincent (2003) explored similar issues, particularly with reference to diverse cultural identities. Melanie Walker and Elaine Unterhalter (2007) took a rather different approach, taking Amartya Sen's 'capability approach' to social justice, in which fairness and justice are determined less by the overall impact on society as a whole than the freedom of each person to make decisions they value and remove obstacles to those freedoms – the expansion of their capabilities ('the ability to do valuable acts or reach valuable states of being; representing the alternative combinations of things a person is able to do or be': Sen 1993, p. 30). There have also been special issues of journals devoted to the topic, notably the *Journal of Education Policy* in 1998 (Gewirtz 1998) and in 2012 (Francis and Mills 2012).

Not all educational researchers feel this imperative: Becky Francis (2011) has criticised educational research as 'far too removed from policy and practice' (p. 4) in England and the UK, and that 'as educationalists, we should be concerned to increase our research 'impact'... beyond the narrow drivers of research assessment measurements' (pp. 4–5). But she also notes firstly the dissonance between researchers and policy makers embedded in neoliberal ideologies who drive 'instrumental understandings of the purpose of education as exclusively economic, and of education credentials as exclusive indicators of "quality"' (p. 7), and secondly the dominant ideology of many educational researchers apparently leading to a focus on deconstructing contemporary policies and their suppositions rather than proposing constructive alternatives. Francis attributes this lack of direct engagement with policy to four factors: (a) the relativism that encourages deconstruction rather than construction, discounting claims to 'truth'; (b) the research evaluation in UK Higher Education (and increasingly in other countries), which prioritises publication in relatively esoteric journals rather than communication with practitioners and policy audiences; (c) the expectation that policymakers will disregard research findings; and (d) a tendency to criticise, rather than to become associated with existing policies and practices. Elsewhere, Francis and Martin Mills challenge education researchers as possibly being 'in danger of becoming knowing observers of

psychological phenomena, comparing clever notes within our own exclusive circle, while practice and policies that exacerbate inequalities continue oblivious and unabated' (2012, p. 578).

Structural inequalities, both in educational provision and in educational outcomes, are an important part of the problem that needs to be addressed in educational research. Reay, however, makes the point that schools and education (and research) cannot compensate for social and economic injustices: 'social class [must be] recognised as a fundamental division in British education that requires urgent, far-reaching attention' (Reay 2012, p. 588), and she argues not just for broadening the idea of educational success beyond the academic, but that our focus should not be on 'perceived differences of ability and aptitude but rather [on] children's very unequal and unfair educational starting points' (Reay 2011, p. 2). She draws on Richard Tawney's seminal work, *Equality*, in which he describes the 'barbarous associations of differences of educational opportunity with distinctions of wealth and social position' (Tawney 1931, p. 210), that create perceptions of social inferiority to become 'the cannon-fodder of industry' (p. 203) that cannot be rectified until 'children of all classes of the community attend the same schools' (p. 204). The inequality between private and public education continues to persist nearly 90 years after Tawney wrote: private schools, with about 7% of the UK's pupils, consume 21.3% of total educational spending, and spending per private school pupil is 3.6 times greater than the amount spent on a state school pupil (Ryan and Sibieta 2010, p. 2; OECD 2012, p. 257).

Perhaps more significantly, Tawney also challenges the commonly perceived purposes of education:

individual happiness does not only require that men [*sic*] should be free to rise to new positions of comfort and distinction; it also requires that they should be able to lead a life of dignity and culture, whether they rise or not, and that, whatever their position on the economic scale may be, it shall be such as is fit to be occupied by men. (Tawney 1931, p. 146)

This is another cause of educational injustice: the utilitarian and instrumental imperative that the purpose of education is to valorise and maximise the *economic* capacity of every individual. Griffiths has challenged this, writing that education should 'also concern itself with living educational experiences as part of what makes a good life' (2012, p. 655). Education should be valued when 'it cultivates valued outcomes in an individual, such as autonomy, citizenship, imagination and critical thinking, all of which are significant for the establishment of cohesive, democratic and free societies' (p. 656). Such a conception of education, of cultivating or building the individual within and as part of broader society is cognate with the German educational tradition of *Bildung*, the cultural maturation of the self, recognising individual diversities, developing agency, talents and abilities. *Bildung* is thus, as Georg Hegel argued (1985 [1840]), about keeping oneself open to that which is the other (Jurist 2000).

Griffiths maintains that education should be liberal, in the *Bildung* sense, as being an intrinsically pleasurable process that is 'part of what makes a good life good, not just as part of what is requires to produce a good life [in the future]'

(2012, p. 656). Such a broader, humanistic education has at its core both individual, personal growth and fulfilment, but also the improvement of society (and the whole of humankind). Eleonora Belfiore refers to humanities and arts education as having the power to ‘instil civic values, thus contributing to the progress of humankind’ which ‘have a crucial moral function of guidance’ (Belfiore 2011, p. 32).

This contrasts most uneasily with the exposition of the English Minister of State for Schools, Nick Gibb, in an address on ‘The purpose of education’ (Gibb 2015a). In this he stresses that:

Education is the engine of our economy, it is the foundation of our culture, and it’s an essential preparation for adult life. ... [it is] about the practical business of ensuring that young people receive the preparation they need to secure a good job and a fulfilling career.

The purpose of schooling, he went on, was to ‘ensure that more people have the knowledge and skills they need to succeed in a demanding economy... [which] starts by getting the basics right. Here too, our long-term performance has lagged behind those of our international competitors’ (Gibb 2015a). This sense of education as a competitive performance has pervaded the UK’s neoliberal discourse for more than 40 years, as will be examined in more detail below, and Gibbs’ views on various aspects of teaching and testing in Chapter 3, (Hutchings 2021a). By comparison, the Scottish Executive’s policy of the purpose of education is significantly broader, less instrumental, and aspire to combine both individual and societal outcomes and benefits: ‘our aspiration for all children and for every young person is that they should be successful learners, confident individuals, responsible citizens and effective contributors to society and at work’ (Curriculum Review Group 2004, p. 12).

## What do we mean by social justice and equity?

Before examining our approach to the key terms that define this book series – ‘educational science’ and ‘public good’ – it may help to offer some notes towards a definition of our underlying axiological drivers, social justice and equity.

In some ways, equality has been a particularly British (or more precisely, English) obsession. Matthew Arnold (the poet and critic – and the Chief Inspector of English state schools in the 1880s) spoke of the English ‘religion of inequality’ (1878, p. 333). In an address to the Royal Institution, he spoke of the greed of the aristocratic and middle classes for ‘wishing and trying for the bigger share’ (p. 313). Arnold had at this point nearly 27 years’ experience of visiting elementary schools across England on a near daily basis: he deplored ‘the wall of partition’ between the middle classes and the working classes: ‘they seem to belong to two different worlds’ (p. 323).

A commonly used measure of economic equality is the Gini coefficient (Gini 1911, 1936), which measures the frequency distribution of a population on a scale from zero (perfect equality, all incomes are the same) to one (total inequality, one

person has all the income). The Gini coefficient on disposable income (after taxation) can be used to show both changes in a country over time, and comparisons of the relative distribution between countries (ignoring actual differences of overall or average incomes in each country). Most European countries had a Gini index of between 0.25 and 0.35 in the 2010s (Balestra and Tonkin 2018), and these have shown slight rises in inequalities over the past 50 years (for example, Germany rose from 0.25 to 0.29; Italy rose from 0.30 to 0.34; Sweden rose from 0.21 to 0.26 and the Netherlands from 0.26 to 0.29); in contrast, in the UK the index has risen more rapidly from 0.24 in the mid-70s to 0.35 in 2010 (thus a growing inequality). Another measure of inequality is the share of wealth or of post-tax income between each tenth of the population: Table 1.1 shows the changes in income distribution between 1979 and 2015/6 and the even greater disparities in the distribution of wealth in 2012–2014 by deciles.

John Rawls addressed issues such as these in *A Theory of Justice* (1971). He argued that the rules of distribution within a group would be fair if a person agreed to be bound by those rules, even when s/he was unaware of how those rules affected them – whether by adding to their personal share, or lessening it. Rawls thus combines egalitarianism with a form of mutual moderating liberalism: his innovation counters the way that utilitarian models of equality subordinate individual claims to the overriding demand for the general public good. Inequalities were only permissible to Rawls if they left everybody better off. From this he concluded that:

... resources for education are not to be allocated solely or necessarily mainly according to their return as estimated in productive trained abilities, but also according to their worth in

**Table 1.1** Distribution of post-tax income 1979 and 2015/6, and wealth 2012–14, United Kingdom

	Income		Wealth
	1979	2015/16	2012 - 14
Top 10%	21	23.0	40
Second 10%	14	15.3	20.5
Third 10%	12	12.3	13.5
Fourth 10%	11	10.3	9.5
Fifth 10%	10	8.8	7
Sixth 10%	8	7.7	4.5
Seventh 10%	7	6.8	3
Eighth 10%	7	6.0	1.5
Ninth 10%	6	5.3	0.5
Bottom 10%	4	4.6	0.1

Notes. 2015/16 income figures exclude non-taxpayers, and include tax credits for some in the bottom decile. Wealth includes property, financial, physical and private pension fund wealth

Sources: Income: 1979/97: Joseph Rowntree Foundation. (1997). *Income mobility in Britain (Social Policy Research Report 121)*. York: JRF

Income: 2015/16: ONS. (2018a). *Household disposable income and inequality in the UK: financial year ending 2017* Table 3.1a. London: ONS

Wealth: ONS (Office for National Statistics). (2018b). *Wealth in Great Britain Wave 4, 2014 to 2016*. Figure 3. London: ONS

enriching the personal and social life of citizens, *including here the less favoured*. (Rawls 1971, p. 107; emphasis added)

He observed that this countered the model of meritocracy, because the upper classes had disproportionate access to means, rights and organisational authority: ‘Equality of opportunity means an equal chance to leave the less fortunate behind in the personal quest for influence and social position’ (Rawls 1971, pp. 106–7; see also Chapter 14 in this volume).

Meritocracy has proved to be an unusually and perversely interpreted concept. It was by no means a twentieth century construction: imperial China had established this through competitive examinations for bureaucratic office in the Tang dynasty in the eighth century, and the ossification that followed in the effective inheritance of posts into closed circles of families (Moore 1967, pp. 164–5). Both Rawls and Barrington Moore were drawing on the seminal satire by Michael Young, *The Rise of the Meritocracy, 1870–2033: An Essay on Education and Equality* (1958) – the title is usually abbreviated to the first five words: the two dates in the title should have alerted all those who have subsequently referred to the book without reading it that this was no ordinary ‘essay on education and equality’. Young’s work is a satirical fiction, supposedly written in 2034 – a half century after George Orwell’s *Nineteen Eighty-Four* – as a sociological explanation of the populist riots of May 2033. Young took the term from an article by Alan Fox (1956), who wrote of ‘the “meritocracy”’; the society in which the gifted, the smart, the energetic, the ambitious and the ruthless are carefully sifted out and helped towards their destined positions of dominance’ (Fox 1956, p. 13). In an academic style, Young sets out – with references to real social analysts before 1957, and many fictional reports and articles after this date – an explanation of how the development of equality of opportunity and attempts to increase social mobility, building on Tawney and many others, had led to the rise of a closed group of wealthier families, who gained privileged access to the educational systems that validated their children’s entitlement to power and position.

Many people were catapulted forward by their parents’ riches and influence ... they were sent to the best schools and colleges, dispatched on trips abroad and given expensive training for the Bar, counting-house or surgery [i.e. the professions of the law, banking and medicine] ... Educational injustice enabled people to preserve their illusions, inequality of opportunity fostered the myth of human equality. Myth we know it to be; not so our ancestors. (Young 1958, pp. 104, 106)

Young’s thesis was intended as a dystopian warning: if equality was reduced to the mere *opportunity* to succeed, then it would impede and militate against social mobility. As Reay, writing 60 years later, observes, a small number of elite universities:

... reproduce the British elite ... polishing, refining and accentuating the elitism and sense of superiority acquired in earlier schooling. ... Educational choice is based on the resources and social power and networks of the parents rather than the ability and effort of the child. Meritocracy is all ideological bluff with no substance. (Reay 2017, p. 123)

Meritocracy has turned education into a competition for accreditation. Equality of opportunity is used to justify the concentration of educational resources on the

fraction of the population who are judged to ‘best benefit’ by its efforts. Those with ability and application are rewarded with examination grades and access to particular higher education that entitle them to positions of power, influence and wealth. Those judged not to have ability, or not to make sufficient application to their studies, will fail: but this failure will be justified as a consequence of their lack of talent or of effort. It is turned into a game, with the metaphor of ‘a level playing field’ being used to justify winners and losers. Despite the rhetoric of ‘raising standards’, the objective of the educational system is to identify and mark sheep and goats. The losers – and there must be losers, if winners are to emerge – become the authors of their own subsequent misfortunes, and are encouraged to believe and accept this.

Young wrote in 2001, six months before his death, how ‘sadly disappointed’ he was at the misuse of his book:

It is good sense to appoint individual people to jobs on their merit. It is the opposite when those who are judged to have merit of a particular kind harden into a new social class without room in it for others. Ability of a conventional kind, which used to be distributed between the classes more or less at random, has become much more concentrated by the engine of revolution. A social revolution has been accomplished by harnessing schools and universities to the task of sieving people according to education’s narrow band of values. With an amazing battery of certificates and degrees ... education has put its seal of approval on a minority, and its seal of disapproval on the many. (Young 2001)

Access to higher education, in the UK and in most other countries, expanded dramatically in the 1990s and 2000s. But it did so differentially: most of the growth was achieved by recruiting more and more middle-class young people. Instead of a relatively small proportion of the middle classes attending university, as in the 1940s and 1950s, it became for them a *rite de passage*. For working-class young people – always a tiny minority of university entrants – it remains a far less common route (Archer et al. 2003). This is a global phenomenon: Oliver Nachtwey has recently analysed what he calls the ‘regressive modernization’ of Germany, concluding that ‘the more a society is based on equality of opportunity, the more unequal it becomes, and the more legitimate its inequalities’ (Nachtwey 2018, p. 99).

There is an argument that this does not matter: the size of the pot is increasing, and almost everyone is, in historical terms, better off than before. Steven Pinker insists that there has been very real progress and change in the world. He is particularly dismissive of the concept of equality, referring to it as ‘spiteful envy’ (Pinker 2018, p. 98). He suggests that inequality is frequently confused with unfairness, and that most people are unconcerned by inequality, and more concerned with ‘fairness’. Pinker cites a study that suggests ‘there is no evidence so far that children or adults possess any general aversion to inequality’ (Starmans et al. 2017, p. 5). But this study firstly shows that people generally are unaware of the scale of inequality, and secondly assumes a context in which fairness is broadly constructed using Rawls-like understandings of equity. For example, another study of American adults showed that, given a choice between three distributions (two based on real, but unidentified wealth distributions, the third based on absolute equality) and asked which country they would prefer to live in if they were randomly assigned to a distribution, 90% of Americans would wish to live in a more equitable state than the



USA (Norton and Ariely 2011). When asked to estimate the actual distribution of wealth in the United States, they thought it dramatically narrower than is actually the case, and they said they would prefer an even more equal distribution than the one they erroneously believe exists. The responses were broadly similar for women and men, Republican and Democrat supporters, and by income group.

Inequalities matter even more when they correlate with particular groups. The examples used above relate mostly to socioeconomic class; but there are also inequalities in income, wealth, power and influence between men and women, those with disabilities and those without, and members of different ethnic groups. When there are inequalities between such groups – in competencies or educational attainment, as much as in income and wealth – then there are a consequential range of invidious consequences, as shown in the work of Richard Wilkinson and Kate Pickett (2009, 2018). More unequal societies (countries, even different states in the USA) have greater levels of illness, premature death, social discontent, violence, and social immobility) than more equitable societies, and the same is true for groups with a society.

Ides Nicaise (2000) has suggested that educational inequalities arise from two forms of failure. Those ‘on the demand side’ occur when the socioeconomic characteristics of a group lead to individuals in these groups not taking up educational provision. Failures on ‘the supply side’ happen when educational policies and practices disadvantage members of a group: this includes both institutional prejudice against these groups and the inability of institutions to actively respond to the specific and different needs of particular groups. Both are structural failings; and each interacts with the other. If the ‘supply side’ institutions cannot adequately support a group, they create a situation in which members of the group lower their aspirations and expectations, and make fewer demands on the educational system. This interaction creates self-sustaining failure.

Many students, teachers, schools and governments have low expectations of groups that do not, on average, do well at school, and such groups need to be supported to expect that they can achieve.

In most educational settings, those responsible for educational provision also have different expectations of how different groups will perform, and make decisions about what level of performance to expect based on the student’s gender, ethnic origin, social class – or whatever distinguishing characteristic they believe may impact on attainment and potential (for an example of this, see Strand 2012). Low teacher expectations of a group create the conditions in which attainment is low: low pupil expectations lead to underperformance. We need to tackle both supply and demand in order to achieve equitable outcomes. Learners with low self-expectations perform less well. As Young observed, those judged by the educational system not to have merit are ‘easily demoralised by being looked down on so woundingly by people who have done well for themselves’ (Young 2001). A teaching profession that represents all in society might be a first step towards raising self-esteem (Ross 2002, 2012). David Olusoga, a distinguished historian and broadcaster, brought up in a working-class part of Newcastle, illustrates the point:

I never had a black teacher or lecturer, I never once met a black British person who held any sort of professional or managerial role. And by the time I was a teenager in the 1980s, I had, through some process of societal osmosis, internalised the idea that black people didn't, or perhaps couldn't, do certain jobs or hold certain positions ... That is how racism operates. (Olusoga 2019)

It is the *outcome* of policy and practice that is significant, not the *intention*. That various groups suffer educational disadvantage, despite policy initiatives to counter this, suggests that whatever the intentions, educational systems institutionally discriminate against the disadvantaged. The term 'educational institutional inequality' might be used to identify the collective failure of an educational institution(s) to provide appropriate educational services for minority groups, social, cultural, linguistic, behavioural or other characteristics. Such policies amount to discrimination through unwitting prejudice, ignorance, thoughtlessness and stereotyping which result in the group as a whole achieving lower educational outcomes than the population as a whole (Chapter 13, Hartsmar, Leathwood et al. 2021).

Concerns and ideas such as these about the nature and purpose of educational research, and its potential role in moving towards a greater sense of social justice and the need for striving towards equality of outcomes have permeated most of our work, collectively and individually. But they raise particular issues in the contemporary world: how do they equate with current conceptions of educational research as a science, and how do they relate to various understandings of what might constitute 'the public good' and how and by whom this might be determined? It is to these concerns that we turn in the following two sections.

## **Educational science in the context of social justice and equity**

Most of the authors of this volume have worked within postmodern and poststructural theory in our research. This creates particular issues when researching policy if one has the ambition of informing and effecting the practice of policy making. Policy makers want to know definitive answers: what works, and how can policy achieve this. Four issues about the nature of 'science' particularly appear to impinge on social justice and equity objectives: ontology, measurement, reproducibility and categorisation.

In everyday life, we look for patterns and certainty, for effects to be the consequence of causes. Working in the social sciences, many of us have rejected notions of a single 'truth' (Francis 2011, p. 8). But one of the shibboleths of much science (or at least, common perceptions of it) is that science is a value-free objective process that produce results that can be replicated, and that social research must be judged by these criteria. In the UK, a government minister (Sir Keith Joseph) decided in 1983 that the country's Social Science Research Council – the conduit for government funding of social science research – did not operate 'scientifically', and required it (under threat of removal of its funding) to redesignate itself as the Economic and Social Research Council. This view of the nature of science does not

seem to be that of many scientists. Roberto Torretti (1999) observes that many physicists hold what is termed an instrumentalist position: that science can show nothing true or false about nature's unobservable objects, properties or processes. Scientific theory is simply a tool that allows no more than the prediction of observations and the formulation of laws that summarise regularities, but do not (and cannot) reveal aspects that *explain* such laws. Niels Bohr's (1928) 'Copenhagen interpretation' holds that reality is determined by the scientist's choice of experiment: some experiments cause light to behave like a particle, while others make it act like a wave – there is no fundamental 'truth' about what light 'actually' is. Sub-atomic particles do not have a precise location until a scientist measures it, and the act of measurement itself determines its position. Werner Heisenberg's (Born and Heisenberg 1925) indeterminacy principle is that if an electron's position is determined in this way, then its momentum at that point cannot also be known, and vice-versa. The more accurately one of these values is known, the less accurate is the other. This is not a function of experimental limitations, but of the nature of the electron. The 'reality' of physics only provides 'answers' when it is directly questioned.

The same seems true of the social sciences. In education, for example, policy makers want to know about how well reading is being taught, on the assumption that reading is capable of both definition and measurement. There is a common-sense notion of what 'being able to read' is, but there are many texts, in English, that many of us are unable to make sense of – we can 'read' the words, but cannot understand what the text means. But 'teaching to read' is something that governments increasingly expect to measure, and common-sense again expects that there is a best way to teach reading and to measure the success of this process. The UK (England) government (among others) has decided that 'the most effective way to teach a child to read is a robust programme of systematic synthetic phonics' (DFE 2015, p. 4). A proxy for measuring progress in reading is thus to assess how well a child can attribute a phonic sound to a set of letters. Policy makers decided in 2012 to 'introduce ... a phonics screening check for pupils at [the age of 6]... The simple check asks pupils to read 40 words, of which 20 are pseudo-words. This allows teachers to identify those pupils with a genuine grasp of decoding, and those in need of further support' (DFE 2015, p. 4). Thus to 'measure' something as complex as reading, a proxy is selected that is 'not reading', which is used to indicate a reading ability level. Teachers are required to teach a system of phonics (an analysis of which shows that the English language is full of exceptions to phonic 'rules': Berdiansky et al. 1969). Teachers must prepare children to be able to 'say' words that do not exist – which they do, as within two years of the introduction of this test the proportion able to do so rose from 58% to 74% (DfE 2015). Merryn Hutchings (Chapter 3, 2021a) elaborates further on this. This is as classic an example of the taking of measurements causing the nature of what is being observed to shift as any indeterminacy principle in sub-atomic physics.

Policy makers – and researchers themselves – want research findings to be reproducible: conducting the same study, under similar conditions, should produce the same results. There is, however, a current concern that many scientific findings – in the non-social science area – are not replicable. A survey in 2015 of over 1500

scientists by the journal *Nature* found that 52% thought that there were significant problems over reproducibility, and a further 38% thought it an issue of a lesser order (Baker 2016). Some 70% had tried and failed to reproduce another scientist's experiments, and more than half failed to reproduce their own experiments. Education researchers in general have been castigated by David Hargreaves (1996) as producing findings that were non-cumulative, unsystematic and non-replicable: moreover, the research was not known of, or conducted by, practitioners, in contrast to medical research. 'Replications, which are more necessary in the social than the natural sciences because of the importance of contextual and cultural variations, are astonishingly rare' (Hargreaves 1996, p. 2). His advocacy of Randomised Control Trials in educational research ignores the essential contingencies of educational/learning settings (Hammersley 1997; Koutsouris and Norwich 2018). Hargreaves contrasts educational research with medical research: 'the spread of evidence-based medicine is rooting much medical research firmly in the day-to-day practices of doctors' (Hargreaves 1996, p. 3). Martyn Hammersley's counter to this was to deny that teachers' work could be compared to that of doctors: their work 'is a matter of making judgements, rather than following rules' (Hammersley 1997, p. 147). And medical research itself suffers from the same issues as the other natural sciences: a recent study found that 47 out of 53 medical research papers focused on cancer research could not be reproduced (Begley and Ellis 2012). Social science research in general 'suffers' from non-replicability, but, as has been shown, this is no more than in the natural sciences (Camerer et al. 2018; considered in greater detail in Chapter 2, Menter 2021).

Much empirical social science research has also been criticised for drawing subjects from a very narrow base: one estimate is that 80% of the subjects of non-USA studies are drawn from psychology undergraduates in the capital city of a country (Arnett 2008), which are then extrapolated to be representative of the country's inhabitants in general (Rozin 2001). Samuel Gosling et al. (2004) found that social science research articles purportedly representing the general population were based on samples in which 85% were undergraduates, 71% of the participants were female, and over 80% were White. Joseph Henrich et al. (2010) characterise much social research as being based on 'WEIRD' population samples – Western, Educated, Industrialised, Rich, and Democratic. Philippe Rochat (2010) points out that:

in academia, *a priori* claims of universality sell better than diversity, which complicates rather than simplifies matters. Universality claims get more attention because they are cleaner and sharper, encompassing control and predictive power ... [with] greater impact and appeal. This tends to relegate diversity to noise rather than as a primary object of study. (Rochat 2010, p. 107)

The social subject is, by definition, socially constructed, and its activities take place within the context of social interactions (Hammersley 1997). The subjects of the processes of learning – students, teachers, school leaders and policy makers – are grouped and classified as having particular identity characteristics that are often regarded as essentialised and immutable. It can be argued that even what the individual might think to be an intrinsic and natural element of their identity is at least

partially determined by social interaction (Foucault 1977 [1975]; Brubaker 2016). Social constructivism is based on the premise that we can only develop our sense of self-identity through social processes: all our identities are socially determined as we define ourselves in relationship to others, whether in a direct relationship or as the same as or different to the other. Others will also be simultaneously defining our identity in their terms, based on their perceptions and constructions of what they think – or assume – our identity to be, and this will not always correspond, and might even be the opposite of the identities we wish to assume.

Categories of nationality, citizenship and ethnicity are not fixed and predetermined, but dynamically constructed. Francesca Decimo and Alessandra Gribaldo (2017) have referred to:

the strain of categorization and the proliferation of boundaries ... Census records, vital records, passports, identification documents, church records and medical research data establish and grant materiality to the categorisations that inform our identities: beyond sex and age, they designate citizenship, nationality, lineage, religion, ancestry, health, language, ethnicity and race. (Decimo and Gribaldo 2017, p. 5)

Modern states require the classification of their populations: Benedict Anderson pointed to their need to distinguish between ‘peoples, regions, religions, languages’ in order to impose a ‘totalizing classificatory grid’ (Anderson 1991, p. 184). A Foucauldian model of the surveillance of state is used by David Kertzer and Dominique Arel to explain how ‘the use of identity categories ... creates a particular vision of social reality. All people are assigned to a single category, and are hence conceptualised as sharing, with a certain number of others, a common collective identity’ (Kertzer and Arel 2002, p. 5; also Nicoll et al. 2013). Instead of situationally-determined complex social linkages, the reification process of identity categories creates neat boundaries between mutually exclusive groups (Kertzer 2017). The process of enumeration and assignation through:

... body-counts create not only types and classes ... but also homogeneous bodies, because number, by its nature, flattens idiosyncrasies and creates boundaries around these homogeneous bodies, since it performatively limits their extent ... Statistics are to bodies and social types what maps are to territories: they flatten and enclose. (Appadurai 1996, p. 133)

The presumption that everyone will easily fit into such groups becomes increasingly unlikely as migration patterns in Europe are creating new diversities: more people of mixed origins makes it increasingly difficult to use these identity categories (Vertovec 2007).

These issues – of ontology, of measurement, of reproducibility and reliability, of sampling and categorisation – significantly impact on educational research directed towards developing policies of social justice and equity. It is critical to recognise and emphasise the pragmatic compromises necessary in conducting research in these areas:

- the very processes of both policy and research in education necessarily impact on and alter the processes and nature of teaching and learning;

- defining and analysing and educational activities require the measurement of proxies, that not only approximate but change the character of what is being observed;
- social interactions are so contextually created that they can never be reproduced; and
- classifying and characterising populations is no more than a heuristic device, and should be made contextually, at the time and in the context of the particular research activity.

## Determining the ‘public good’ in the context of social justice and equity

How does our understanding of social justice influence our construction of the public good? There must be questions about whether and to what extent state institutions – even those that profess to be liberal democracies – can be seen as necessarily the best agents to define the public good. States and their policy agents operate in what they see as the *state’s* best interests (or the best interest of the *individual policy maker’s* career or political affiliation), rather than necessarily in the public’s best interests, or even the best interests of the subset of the public that are citizens of that particular country. Governmental processes, particularly in democracies, operate on a relatively short-term basis, largely related to election cycles: they procrastinate and deflect concerns for longer term conceptions of the public good (as we continue to see in relation to the climate crisis). States distinguish between their citizens, in whose interest they ostensibly operate, and resident non-citizens – who are nevertheless part of ‘the public’. States see themselves as competing globally, operating to maximise their position – economically, politically, educationally – at the expense of other states (and their ‘publics’) in what is construed as a zero-sum game. And states (whether oligarchic, democratic or meritocratic) are essentially operated by self-perpetuating elites, who rationalise their best interests as being the same as the public’s best interests.

Neoliberalism is the ideology that so pervasively frames the action of the state in a way that it is often scarcely recognised as an ideology. It appears to be so firmly embedded that it appears a natural, neutral law, similar to evolution or gravity (Štremfel 2018). But it acts to define competition as the central characteristic of social relationships, and the market as a system for allocating values and priorities. Individuals are consumers, and we exercise our citizenship through making choices in the same way as we do through buying and selling. The market trumps planning, direction and control by the state, and the state forfeits its ability and right to make decisions to the market. Limiting competition is regarded as an affront to individual liberty: taxes and regulations are minimised. The market produces a natural hierarchy of winners and losers in a zero-sum game, so inequality is virtuous and consequential. The market rewards those who create wealth and supply the needs of the