

# EDUCATION GOVERNANCE AND SOCIAL INTEGRATION AND EXCLUSION

Final report to the European Commission

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*Abstract:* Education Governance and Social Integration and Exclusion

A major tendency in late modern education in Europe is a transformation in governance from governance by rules and directives to governance by goals and results, often in combination with deregulation and decentralisation of decision-making. The implications of such a transformation is discussed in the Report in relation to different contexts of educational traditions and ideas of *Bildung* as well as in relation to societal consequences in terms of social inclusion and exclusion.

The EGSIE project explored the implications of these transitions in education governance during the 1990s. We worked with nine national cases – Australia, Finland, Germany, Greece, Iceland, Portugal, Spain, Sweden, and the UK (England and Scotland). The studies were organized around three sets of theoretical questions: (1) What are the narratives or sagas of changes in education governance? (2) How are the subjects in education constructed? (3) What are the relations between governance and social inclusion and exclusion?

The research reviews and conceptual analyses resulted in two distinctive problematics dealing with relations between education governance and social inclusion. The first is an *equity* problematic, where access and participation as well as social integration is focused over different categories such as gender, socio-economic status, ethnicity, or minority, such as travellers. The second is a *knowledge* problematic where we focus on the construction of categories that are used to identify inclusion and exclusion. Our main focus turned out to be the knowledge problematic. The studies were organized around national cases and local contexts as expressions – and not sources – of changes in education governance. The research was built on studies on different levels; text analyses of policy documents, interviews with *system actors* such as politicians and administrators as well as *school actors* (teachers and headteachers), a survey of students in different national and local contexts. These studies were combined with analyses of international and national statistics.

The results can be summarized in two distinct sets of outcomes. The first set deals with the problematics of equity. A basic notion is here that (a) patterns of social exclusion and segregation increases during the current period, and (b) educational systems are expanding and including more adolescents for longer periods of their life. This is combined with (c) organisational decentralization and an increased steering through management procedures, assessment, and resource regulations. The first two outcomes mean that increased access to education is combined with increased exclusion by means of education. Within this set we also note the lack of difference in perspectives among system actors and school actors.

The second set of outcomes deals with the knowledge problematics and the systems of reason, which enables a consideration of (c), the new steering mechanism in relation to social exclusion. Our studies resulted in different, but similar categories, conceptions, and patterns of reasoning. These were presented in texts, and interviews as well as in statistics. Similar narratives on the necessity to transform education governance were presented. In sum these narratives reveal a fatalism among actors as there appears to be no alternative to current changes. Further, we raised questions about the ways in which external, social and cultural distinctions of deviance travel with institutional practices through which reforms are formulated at all levels of the system. The changes in narratives governing reforms are combined with new demands on teachers as well as students. There was a silence about those who did not fit in this new way of governance

A major conclusion in terms of education policy making is the need to problematize current stories of educational progress. There is a need for more reflexive and intellectual understanding of changes in education governance and the systems of reason that are used for educational changes as well as for social inclusion and exclusion of youth.

# **1 Executive summary**

## **1.1 Background and objectives**

Our approach to education governance and social inclusion and exclusion involved both an institutional and a cultural understanding. We approached changes in education governance as related to transitions towards a “late modern” society. Such an approach enabled us to consider not only national contexts but issues of globalization that are embedded in the changes occurring within the European Union. Thus, we gave attention to institutional changes in the governing practices of education related to social inclusion and exclusion. But we are also interested in the changes in the systems of reason on education. The latter gives focus to a little considered element of educational policy, that is how the categories and distinctions of education generate principles about the participation of the ‘new’ citizen in terms of social inclusion and exclusion in the educational system. Within this study is the background of current restructuring measures of European states in terms of decentralisation, deregulation, marketization connected with changes in accountability and in management.

The EGSIE project is to identify relationships of education governance to social integration and exclusion of youth in European contexts and to discuss policies on governance that will help to minimize social exclusion and maximize inclusion. Of special interest were students transitions between different levels or kinds of education or from education to work or unemployment. In the context of the relation of educational governance and social inclusion/exclusion, our project reviewed and analysed current research, different national/regional systems of education, the discourse on education governance in international organisations and the potential impact of this on national discourses; national and international statistics on social integration and exclusion related to education; the narratives of school change among politicians, school system administrators, teachers in different European countries; with the intention of comparing different national cases in Europe.

## **1.2 Approaches to Reaching Research Objectives**

The different national contexts are often described as a transition from a system of steering from behind towards a system of steering by means of goals and results. We focus on relations between changes in education governance on the one side and social inclusion and exclusion on the other side in order to consider two interrelated changes. One are those that relate school, culture, and society. Two are recent and internationally widespread changes of education governance. We view these two sites of change as overlapping and mutually related rather than distinct and in some hierarchical relation. Further, these different changes have implications for the restructuring practices related to citizenship and, thus, the meanings given to processes associated with democratization. Thus, we put forward two main empirical questions:

- What characterises the new governance structures of educational systems in different European countries and what are the conceived implications of this for social integration and exclusion?
- What are the implications of different national contexts for the social meaning of restructuring measures and the consequences of these measures in these contexts in terms of integration and exclusion?

## National Studies of an International Movement.

Identifying the case of research is an important theoretical problem that enables the proper focus of data collection and analysis. In this research, the comparative case is the relation of educational governance and social inclusion and exclusion. That case is explored through various field studies formed through national studies conducted by the European partners from: the Nordic welfare states of Finland, Iceland, and Sweden; the Anglo-Saxon cases of England and Scotland; the Continental and unified Germany; and the Mediterranean cases of Greece, Portugal and Spain. Furthermore, our studies were carried out in co-operation with an Australian research team.

Our approach considers schooling comparatively and theoretically as part of a world system. Following such research in sociology and education studies, we recognize that focusing on individual nations as the case does not enable an understanding of how the narratives, institutional governing patterns and images of teaching and curriculum travels globally and changes overtime. Further, the focus on schools as part of world system changes enable us to consider how policy and education system knowledge (what we call ‘the systems of reason’) circulates among various institutional settings to create patterns of social cohesion and collectivity that simultaneously produce divisions related to social exclusion. In this sense, our study departs from existing studies of world systems and traditions in the sociology of education in both its concreteness and its broadness. The concreteness is related to our focus on the European Union space and our emphasis on interviews with multiple layers of policy texts and actors in the political as well as educational arenas. The study also broadens the focus of existing studies of education and world systems through its detailed discursive analysis to consider how educational knowledge not only describes and explains the phenomena of youth but is also a social ‘fact’ in the construction of social inclusion and exclusion. Importantly, this strategy of research enables to investigate how institutional rules and the systems of reason in schooling differentiates and divides, a central issue in the relating of issues of governance to that of social inclusion and exclusion.

As a consequence, the methodological approach of the EGSIE study contributes to world systems analysis, comparative research, and policy considerations related to social exclusion. It provides a way of methodologically exploring how the school is embedded in a world system of modernity that is changing historically. The interdisciplinary quality enables an understanding of the ways in which school policy and school practices intersects in production of similarity and difference. With this overview we will now turn to the different parts in our research.

### Considering social and historical contexts of the problematics

At the end of the last century the French sociologist Emile Durkheim dealt with transitions from a traditional society to a modern society, the role of education in that transition, and the implications of that for social cohesion, integration, and fragmentation. In many ways, we find ourselves today in a new situation as questions of social cohesion are being reformulated and redefined through an amalgamation of institutional and political changes. The struggles about social inclusion and exclusion cross state welfare and economic policy issues with that of issues of globalisation.

This is evident within the European Union. Long term migration patterns has long been part of the European context, but which has a new meaning with the European Union space.

Further, significance of the changes are related to new work patterns and educational requirements as the post-Fordist economies of the European Union are coupled with, for example, changes in the politics of cultural movements, such as in contemporary feminism, green movements, and multi-culturalism in many European states. The new cultural, social and economic spaces of the European Unions place the educational system as a central institution in late modernity in confronting issues of integration and cohesion as well as that of disenfranchisements, and exclusions. The school is the central credentialing agency concerned with providing access, social progress and skills for the labour markets. Further, schooling makes possible the types of individualities which can perform as productive and responsible persons in the different arenas of the modern world.

The institutional and socialization roles of schooling directed our study to two notions of governing. One the governance related to the organization procedures and institutional practices that define access and participation in education and through education into the labour and cultural fields. Second is governance as related to the systems of reason embodied in policy and educational practices. Governance, in this second sense, entails examining the principles that order which problems are formed for action in education, how the objects of rectification in policy are differentiated, and the classifications that shape what is deemed as reasonable possibilities for the future paths of reform. Both notions of governing - the processes through which actors gain or are denied access to decision-making and the principles of ordering and classifying - we argue have important implications to the issues through which individuals are qualified and disqualified for action and participation.

### Transitions: time and space continuum

As our earlier reference to Durkheim suggests, we can think of the current situation within the European Union as one of a transition. The transition concept refers to changes over time - from an old to a new system or from changes of the characteristics of actors or conceptions of knowledge through which the objects of equity and justice are constructed. Our notion of transition, however, is not a normative principle that traces a teleology of evolution and progress. The notion of transition in this research is one that considers changes in institutional and knowledge (systems of reason) that relate educational governance, and social inclusion and exclusion. The notion of transition requires not only examining the internal changes in education but how those changes stand as points that relate education to other social arenas such as economy, culture, and political systems. Thus, we view decentralisation and restructuring of the fiscal polities in education and social/cultural securities nets of the welfare state as the data for considering the practices of schooling. The transition concept, then, is used to distinguish between "mere" events that maintain existing rules that structure school systems and changes that have significance to the principles that relate governance, schooling and social inclusion/exclusion.

### **1.3 Schooling, governing, and social inclusion/exclusion**

The first task of the research was a critical literature review concerning different theoretical perspectives and conceived research results relating education governance and social integration and exclusion. Each participant in EGSIE reviewed national policies and organizational changes related to education governance and social integration and exclusion. In addition, a general international review was done.

The review of the literature indicated that there is a taken-for-granted assumption that governance is the rational process of planning and evaluating the outcomes of policy. In our

research, that assumption of governance in policy practices is not so much challenged, but rather diagnosed in how it functions and some of its implications. Further, our ambition is to consider the ways that policy and political and system actors discourses overlap in creating 'kinds of people' that are targeted by state practices related to exclusion.

### Some Conceptual Difficulties with the Ideas of Social Inclusion and Exclusion

Our review revealed no discussion of the problem of governance. Yet while we found no conceptual discussion of the governance, there was some discussion of the conceptual difficulties in the concepts of inclusion and exclusion. These difficulties were (a) the lack of consideration of the underlying premises and assumptions in the formulation of problems and practices in relation to the idea of governance; (b) the classifications of groups to be included or as deviant in social policy were not scrutinized as to its assumptions and implications, thus conserving the political systems of reference embedded in the categories and distinctions that are to order political changes; (c) the continual imposition of value and normativity in research through which the boundaries of inclusion/exclusion are drawn, such as the tensions between the values of collective and community obligations and that of individual values; and (d) the ways in which contemporary discourses of inclusion can deflect attention from issues of citizenship, class and racism.

### Governance and inclusion/exclusion: Equity and Knowledge Problematic

To methodologically pursue our research aims and the conceptual limitations of existing studies, we considered inclusion and exclusion as mutually related rather than as distinct concepts- expressed conceptually as inclusion/exclusion. Further, we identified two problematics or ways to think and conceptualize the relation of governance and inclusion/exclusion.

One is *the equity problematic* as a tradition in policy and research that focuses on the means by which activities are controlled or directed to deliver an acceptable range of outcomes according to some established social standard. It emphasises rational action and a collective authority through the production of expectations and entitlements of individuals who act as agents of their own interests. The problem of governance is to define the administrative practices that promote or limit social, cultural and economic integration or access of social groups and individuals. Governance is to order and to judge what is appropriate action to correct social imbalances. The notion of governing in the equity problematic relates to the procedures and processes that enable groups and individuals access and representation. This notion of governance appears among different ideological positions about the outcome of change itself.

Inclusion in the equity problematic needs to be considered in relation to the notion of governance. Governance is typically related to a concept of the State that gives attention to the formal administrative practices in organising institutional practices and social actors. The State is considered as an actor that controls, mediates the benefits in existing arrangements and the allocation of values to be distribution among social groups to challenge inequities.

The equity problematic dominates social policy and research throughout Europe, North America, and Australia. Research in the European countries in which our research project is undertaken has assumed that governance occurs through policies and administrative rules that are to encourage participation, and the allocation of resources in tackling problems of inclusion and exclusion.

One can think of the belief in the modern school as an institution to promote equity and justice as operationalised through the problematic of equity. For many of the respondents in our study, the school was viewed as a progressive institution and teaching formed by an ethos of caring. But within a context of rational choice making and the parents/teachers as clients in a market place. In Iceland, for example, the saga of progress is built around the school, with indicators (such as TIMSS) making it a national project to revise the curriculum and make the country the best in the world through making the school as the best in the world. In Sweden, that belief in the school still exists but with it no longer assumed that the schools are "centres of knowledge and competence" and that the position of the school needs to be actively re-legitimated. Our study also suggests, as in the Portuguese study, that there is a new context of uncertainty of schooling in which the faith in the school is challenged through disillusionment in the role of the school that no longer is able to appear as a fair institution in unfair world. Yet this disillusionment occurs with increasing demands for access to longer school itineraries for studies as this is continually thought of as fulfilling the hope of equity and justice.

The knowledge problematic is a second but complementary to that of the equity problematic. The knowledge problematic focuses on the rules and standards of reason through which policy and actors 'make sense' of the capabilities and characteristics of the youth who succeeds or fails in school. It asks how the actors represented in the equity problematic are constructed through different discursive practice, such as the 'seeing' children as a minority and "at-risk", or the classifying the 'family' as 'single parent' and 'at-risk.' For our purposes, we view the system of reason in education as not so much as about which groups are represented or marginalised, although that is important to policy. Rather, we are concerned with the historically constructed systems that circulate in policy and actors about what is possible to know, and to be acted on to improve both the individual and the society. In this sense, we could think of governing as related to the principles that how the youth and teacher act and participate; and, by omission, the characteristics that are not valued and thus excluded from what is classified as normal.

At this point, then, we can differentiate between the problematic of equity and the problematic of knowledge, as the following. The equity problematic treats governance of inclusion and exclusion as a problem of access and participation of groups or populations. Sometimes called representational politics, the focus on on groups not represented but structurally classified through categories of race, class, and gender. The knowledge problematic, in contrast, considers the construction of the 'qualities' that distinguish, differentiate, and 'makes' the individuality of the groups scrutinized. To think of it a little differently, the knowledge problematic focuses not race, gender, or class as central to research, but on the practices of normalisation and division that produce race-ness, gender-ness, or class-ness. The knowledge or systems of reason are not what are commonly considered as the biases, stereotypes, or beliefs that create exclusion. Rather, what is concerned is how distinctions, differentiations and categories of different layers of educational practices normalise and divide populations and the inner qualities and capabilities of the individual (such as, the dispositions associated with a child's 'self-esteem', the 'stages of child development', or the cognitive, rational characteristics of a 'learner'). Governing is in the distinctions, differentiations, and categories that are generated for action; and the inclusion/exclusion as the normalisations and divisions that simultaneously create an inside and outside.

The two problematics of equity and of knowledge are not only ways of conceptualising a relation of governance and inclusion/exclusion, but they also embody complimentary ways of

organising, interpreting and constructing the possibilities of change and of thinking about the transitions that are occurring. The equity problematic is to scrutinise the points of access and organisational processes through which access and participation occurs. The positive outcome of policy is to eliminate exclusion through full inclusion. The problem of governance in the knowledge problematic is related to the duality of inclusion/exclusion. Change is tied to the diagnostic of the systems of reason that order, divide and normalize populations that form the individuality acted on in schools and through policy. Our purpose in this section is to engage the two problematics in a conversation with each other to understand of the complex relations in which governance and social inclusion/exclusion are joined in contemporary schooling.

#### **1.4 Problems, theoretical questions and design**

The design is built around the two problematics described above. Within an equity problematic we study the construction of the educational system and relate that to the distribution of resources among different categories such as gender, ethnicity and social class. Within a knowledge problematic we focus on the systems of reason that construct or reproduce the playing field of social inclusion and exclusion.

#### Theoretical questions

This study is organised around three sets of theoretical questions presented above and preseted in table 1.1

*Table 1.1:* Theoretical questions for studies on education governance and social inclusion and exclusion.

I. Constructing subjects:	a. What are the concepts of the individual?
	b. What are the silences in these constructions of subjects?
II. Constructing narratives:	a. What are the stories of progress and its denials?
	b. What are the images, myths and sagas that are to place people into a collective whole?
III. Constructing governance and social inclusion/exclusion	a. How do the constructions of narratives and subjects produce systems of governance and social inclusion and exclusion?
	b. What are the conceived or constructed relationships between systems of governance and systems of social inclusion and exclusion?

## Design

The national cases consist of three Mediterranean states – *Greece, Spain, and Portugal* – and three Nordic welfare states under reconstruction – Finland, Iceland, and Sweden. To this is added the UK cases – *England and Scotland*, with a recent neo-liberal history, similar to that of *Australia*. Finally, from Continental Europe we have *Germany* with links to Eastern as well as Western Europe.

The studies include studies of the national context in which educational restructuring is occurring. These were followed by text analyses of significant texts dealing with the reconstruction of the education governance system. Interviews with politicians and administrators in the education field (n = 156) Interviews with school actors in different local sites: head-teachers, teachers, school nurses and so forth in compulsory and post-compulsory education (n = 360). Reanalyses of national and international statistics on education and social inclusion and exclusion.

In addition to these studies we carried out studies to adolescents in five cases – Finland, Sweden, Portugal, Spain and Australia selected due to different ways to organise education: Surveys directed to samples of students at the last year of compulsory education in the sites studied (n = 3 008).

By means of the case studies we noted context-dependencies in the categorisation of social integration and exclusion as well as in the uses of categories of national contexts used in research literature. Finally, we realised the impact of international organisation – such as the OECD – for the making of education policy agendas in national contexts. Policy text analyses revealed different versions of changes in education governance. The narratives presented notions of inevitable changes in combination with new constructions of self-governing subjects in educational systems. Analyses of interviews with education actors – where some of them were authors of the analysed policy texts – resulted in similar narratives. In the conclusions we will deal with findings from these studies more in detail.

The youth study presented distinct differences between different schooling contexts in as well as between national cases. We found for instance that in the Nordic welfare states students were more sceptical concerning educational opportunities compared to students in Mediterranean contexts. This corresponded well with notions concerning expanded education systems, where education merits at a certain level are necessities for entrance to the labour market. You are more or less excluded if you do not have this merit. On the other hand we found more signs of solidarity among the students in the Nordic welfare states, compared to e. g. students in the Australian contexts.

In statistical analyses frequencies and relations between frequencies are regarded as a way to perspectivise education – conditions, processes as well as outcomes. By means of categories and relations between categories we illuminate what we consider as important. Construction of categories are vital and not seldom a result of struggles. Categories as tools have other sides as well. By means of them we can divide and label people and define what is normal and what is abnormal. Categories are used to create

slots in which we fit people. But once the categories are there people fit themselves in. In this sense, we can think of statistics as technologies of governing that construct the boundaries of normality and also as a practical causality rather than a logic causality. The practical causality occurs as the different categories and magnitudes on statistic tables are compared and form the basis for judging the input characteristics that are related to what output characteristics.

The doxa of statistics is so powerful as a system to reason about social phenomena and people that its categories and the magnitudes of populational numbers surface in a variety of places. They appear not only in national policy statements, but also in the interviews that we conducted with political and system education within the countries of the EGSIE study.

Numbers are presented as describing pre-existing realities, but they also constitute it. The numbers provide a ‘clearing’ within which thought and action can occur. This ‘clearing’ occurs as the numbers establish a bond of uniformity about which objects are counted and where unlike orders of magnitude are placed in relation to one another. The findings of statistical reports stabilised what is in flux, and make change seem only as a technical problem - to change the magnitude of relations. In table 1.2 a matrix based on content aspects and context aspects is presented. Some implications of social inclusion/exclusion in the cross-sections between aspects are mentioned as well inclusion/exclusion.

Table 1.2: Aspects of social inclusion / exclusion.

	Accessibility	Integration – separation	Participation	Economic distribution
Education	Share of population who go to education at different levels (including preschool and adult education) schools free of charge / school fees	Comprehensiveness/ divisions in education at different levels divisions of private - public schools, choice between schools	Share of population who successfully complete education at different levels Exclusion rates (drop-outs, school leavers without complete education) Truancy rates	Principles of resource allocation (even – uneven, need-related etc) between municipalities, schools and students
Labour market	Employment and unemployment rates	Labour market divisions	Who are included and excluded in the labour market	
Society/ Citizenship	Who get access to society and who are considered as citizens	Ethnical divisions religious divisions regional divisions housing segregation	Participation in general elections Organisation rates Literacy rates	Income distribution, Poverty, Share of population on social welfare

We can think of the different categories, cross-referencing and comparisons of numbers that are embedded in statistics tables as constituting educational ambitions. The tables give us possibilities to compare the different national cases as well as gender issues by means of the structure of relations inscribed in it. In the statistics are two different stories of progress. The one – and older story – is about increasing access to education in combination with decreased lack of education. Here problematic stories are defined in terms of social class, gender, ethnicity as well as ages. The newer story is about

success to reach certain results as measured by tests or perhaps by use of certain resources, such as computers or the internet.

The subjects are constructed as individuals inside or outside an education system in progress. A way to construct individuals that deviate are those who fail to reach certain standards or who are low-achieving students. Sometimes this is made by distinctions of students social and cultural characteristics. Social exclusion is in general terms defined in terms of access, drop out, or failure by the students. Distinctive for social exclusion in the education world is failure to complete compulsory education. The education system is a system that disqualifies as well as qualifies.

### **1.5 Conclusions:**

Governance as procedures of management, laws and resource steering:

We can think of the particular categories of populations targeted in the policy documents and actor interviews as part of the governing of education. These categories relate to (1) economic inclusion in which education is related to labour markets, with issues of class and social stratification privileged. These categories have changed in the past two decade to include greater distinctions of marginalization and exclusion. The broadening of categories in the past decade or two include: (2) cultural inclusion in which access issues to include cultural representations of gender, race, ethnicity and religious minorities; and (3) inclusion of the disabled.

From this perspective, we can identify certain strategies of management, legal, and resource steering for change.

- 1) Resource and Law Steering as *Posteriori* Governing:
  - a) Changes in resource and law steering of education entail a replacement of center issues traditional form of control *a priori* based on normative prescription to *a posteriori* local regulation and control modes related to school autonomy. This type of steering is related to the decentralization that has occurred throughout the countries in which municipalities and local regional governments have more control over how resources are allocated.
  - b) One change in governance or steering of the schools systems is through new forms of resource steering (fiscal) and law regulation. Resource steering has involved the transfer of fiscal management to local districts, with changes resulting in the workplace, curriculum and professional relations, contract management, and new self-evaluation; and the promulgation of laws to modernize the system and at the same time to address problems of social exclusion.
  - c) National laws have introduced more explicit programs for character, moral and civic education to address perceived needs of cultural dislocation and disintegration.
  - d) Both legal, fiscal, and administrative rules of the State have enabled the partial the privatization of school to enable children of the poor and marginalized communities to have choice in educational suppliers.

- 2) Decentralization/Centralization Governing Strategies
  - a) *Decentralization of the educational system has increased.* Its purposes are to increase citizen involvement and the development of civil society, to introduce more efficient resource management, and to provide greater harmonization through reducing the disjuncture between communities that are marginalized and the school values.
  - b) *Centralization/Decentralization are coupled* as governing mechanism. The two different ends of the governance continuum co-exist. At one end are tighter assessment strategies in teaching, increased attention to measurement of children's and teacher performance, and other accountability measures. At the other end of the spectrum are school 'educational zones,' one example of recent policies to decentralize through partnerships among school, community, the State and business.
  - c) The relation of governing through strategies of centralization/decentralization also involves new governing discourses of assessment and management typically called *quality control*.
- 3) *Professionalization Strategies for Greater Autonomy and Involvement:* There are new governing strategies for the teacher's development. This entails greater professional autonomy through greater involvement of the teachers and local school administrators in school and community decision-making related to the decentralization processes of schools.

#### Fatalism and belief in the need for change among different actors:

We did not find as much differences among the different level of actors as we might have expected. In all of the school systems, system actors were experiencing a need for change and a fatalism about change. The fatalism was expressed as one of the globalism of the changes which influence national school systems. Changes appeared authorless, the product of anonymous forces of society. The fatalism embodied difference faces of *topoi*; that is, *the authors of change were expressed as banalities about universally accepted truths that did not need to be questioned.* The phrases were banalities were assumed as known by everyone but which had no points of reference or specificity other than as mobilizing a seeming consensus about change. Where the *topoi* assigned an actor, that actors was the European Union that stood a focal point by which system actors could justify local practices but at the same time provide rules of harmonization through regulatory ideas

#### Some consequences of changes in governing through management policies and law

- 1) There is a conflict between the two poles of centralization/decentralization. We can think of the conflict between involvement and rules for assessment as one between the logic of modernization and logic of democratization. One outcome of the ways was new divisions within the school organization that was also accompanied with new systems of dividing children through the newly created monitoring and assessment systems.

- 2) **Governing at a Distance: The New Professional Strategies**
  - a) The logic of action demands that teachers order and self-govern their action through particular types of self assessments that are to steer individual teaching and evaluation of work.
  - b) The new governing practices of decentralization/centralization introduces new expertise that is formed outside the school and when brought into the school reduces teacher's autonomy.
  - c) There is an increased bureaucracy and administration to monitor the school through increased differentiation in management, involvement of local and national politicians.
- 3) **Autonomy as Increased Demands and Steering:** The professionalization strategies, our study revealed, increased the demands and speed of work among teachers and school administrators. The new cultural and social organization of teaching has also produced a new hierarchy in levels of decision as the control of teachers' time has increased. But at same time, it is reported in multiple cases that there is a decrease or a maintenance of existing resources, and thus a reduced capacity to work with individual students.

#### **Governance through systems of reason: the characteristics of the good/successful and the poor/failing student and family**

When the interrelation of the management practices, fiscal and political decentralization, and the pedagogical distinctions about the teacher and the child are examined certain conclusions are identified.

- 1) *External Categories in Making of Inclusion/Exclusion:*
  - a) If we look at the categories governing the principles in which inclusion/exclusion are discussed, the major categories of education are formed in relation to external factors. The categories influencing inclusion in schools have seemed to remain the same since the 1960s. These are those that classify individuals and groups by socioeconomic status and poverty. But the categories of differentiation of marginalization and exclusion have shifted to include ethnicity, gender and race, including more detailed categories about family and delinquency to identify and target educational programs, such as single parent families and teen-age prenegancy.
  - b) A significant in the categories that define exclusion is that the old and new categories express certain cultural and social distinctions and relations. Both the 'older' structural categories of poverty and class as well as the more recent categories of ethnicity, gender and race are correlated with new distinctions of deviance that make for a practical cause-effect relation. For example, our data continually expressed the problem of marginalization and exclusion of different populations in relation to social problems of 'lack of discipline' in the community, unemployment, and dysfunctional families (single parent, teen-age pregnancy) and educational attainment. This, however, was not necessarily the

case with gender issues which we can surmise moves along structural lines of division in society.

- c) The importance of the overlap of the new categories with that of poverty and socio-economic is that the excluded groups become defined through new social categories of deviance.
- 2) *The Transportation of the External Categories into Internal Categories of School Failure and Exclusion:*
- a) The categories of deviance in education are expressed through external social and cultural categories that are transported into the school as distinctions of difference and division.
  - b) The external cultural and social categories form and interrelate with the internal educational categories of the divide students. The excluded student, for example, are 'transient students' who enrol for short periods of time, children with behaviour problems, and 'at risk' description of students. In some instances, the internal categories of deviance are invisible in the sense of not spoken about by the actors but whom everyone knows 'who' is being talked about when discussing the breakdown of discipline or family. This is evident in the silence about immigrants when discussion the need for discipline, tradition, and social harmony.
  - c) The discourses of reforms embody principles that assume that the problem of the school is re-socialize the child and family that are perceived as deviant. The focus on the family and the community involved norms of the dysfunctional family that the school is to remediate. The family background that is signaled as reinforcing dysfunctional cultural values and judgements that are lacking for educational success.
- 3) *Cultural and Social Distinctions of Deviancy in The Institutional Ordering of Reforms:*
- a) The reforms in the management and institutional practices supported indirectly and unintentionally the disjunction in values and the needs for discipline and order. Incorporated into the decentralization discourses were the categories of social measurement and policy that gave reference to questions of family problems, the decline of rural communities (and values assumed related to ideal of the rural).
  - b) A practical causality is established in the ways in which the categories of marginalization and exclusion are placed in a textual proximity to social and cultural categories of difference and deviance. We say practical causality as it is produced through the ways in which different sets of categories and magnitudes in statistical analysis place different phenomena together to provide seeming explanations about the cause and effects of social inclusion and exclusion that are not born out in any logical analysis.
  - c) The different practices of governing through assessment, management and quality control are governing systems, but not only in the activities organized

through policy but also at a discursive level. The categories and distinctions of management inclusion/exclusion normalize and divide the child who is succeeding or failing in schools.

### **Individualization, new centralization/decentralization management practices, and governing inclusion/exclusion**

- 1) The new management strategies for governing education overlap with new remediation strategies for including the child. The pedagogical and measure strategies focus on an individualization. Individualization is thought to provide greater success and thus inclusion for children. There is a reported shift in the principles governing teacher's actions from the social situation to a pedagogical focus about the knowledge and attitudes that pupil has (individualization).
- 2) The characteristics of the 'good' student across the countries is a student who is flexible, problem-solving, collaborative and perpetually involved in a self-monitoring and active 'lifelong learning.' The quality of child is one that embodies an entrepreneurial logic.
- 3) If we consider the images and narratives of the 'good' child in the practices of individualization of pedagogical practices, particular divisions govern practice. The governing relates to differentiate the child who is a lifelong learn from the child who lacks the characteristics described above, such as lacks discipline, moral character or cultural norms that are deemed important for success. Thus, social and cultural notions of deviance are embodied in the characteristics that embody the child who is not entrepreneurial and continually 'learning.'
- 4) The data also suggests that curriculum discourses have intensified discussions about the problem of inclusion and exclusion through categories of difference, flexibility in curriculum multi-culturalism. However, the discourses of inclusion/exclusion are viewed as having not changed in relation to the substance of discourse.
- 5) The expansion of categories that differentiate the external social characteristics of the excluded student and the expansion of the categories of internal to the institutional ordering of the school have two consequences for our discussion.
  - a) They embody images and narratives of deviance through making 'kinds of people' who are targeted as socially excluded. As stated above, the new sets of distinctions and differentiations overlap external and internal categories that are practically related as governing principles in the educational discussions.
  - b) The focus on the new discourses of school restructuring at the management, institutional and pedagogical level make the cause of exclusion as the inner characteristics of the child, as opposed to earlier classification which focused on systemic factors of poverty and class. This makes alternatives and resistance more difficult.
- 6) The new management approaches and curriculum approaches to govern education are to be more inclusive: to provide students who are more self determining through the action that they initiate by themselves. At the same time, respondents report that the individualization makes the individual drop out form socially accepted

communities and position of fully authorised citizenship as a personal and subjective condition to give up.

- 7) The individualization, management changes of decentralization, when combined with other changes, produces a regression toward the mean that is expressed as a leveling of pupils and special teaching. At the same time, the assessment procedures increased differentiation of pupils and increased centralization through tests and grade criteria.

### **Statistics and social inclusion/exclusion**

- 1) The categories and divisions in national and international statistical comparisons of education that are constructed to seek a more inclusive society contains its own irony of modern social planning. There are increased and finer national and international distinctions and elaboration of policy statistics. Thus, we can reach a counterintuitive conclusion to the problem of governance.
- 2) Although with contestation along the way, statistics categories and magnitudes as they are woven with other discourses form a systems of reason that governs how problems to be acted on are constituted; ordering the objects and characteristics of the people to be acted on, the relations through which causes are established and problems remedied, and pathway for the possibilities of change itself. Statistics is not about numbers instituted in political projects and whose biases are to be corrected by better statistical formulas or more correct applications. Statistics is a material practice in that they circulate in fields of cultural practices to generate principles of action and participation.
- 3) Statistical categories ‘make-up kinds of people’ as individuals are transformed into calculable and governable groups. The ‘kinds of people’ targeted in the statistical formulates have typically been drawn from theories of deviancy, with the groups and individuals designated by social planning for rescue or redemption in the name of progress.
- 4) If we think of statistics as embodying the idea of social administration, there has been a dramatic increase in the governance through the making of finer distinctions of the kinds of people governed.
- 5) It is important that the formulation of statistical reports do not exist on an equal playing field. Groups that are marginalized or moralized as deviant appear as the categories targeted for intervention. At the same time, we do recognize that the ‘targeted’ populations also use the political categories to gain greater resource allocation and access in this unequal playing field.

### **1.6 Policy implications**

This study can be used to rethink the way in which we understand the politics of schooling and thus the problematic of research as it relates to policy. Our method of research has been not to measure educational systems in relation to a normative principle of ‘the good’ that dominates contemporary policy studies, such as whether the educational systems are more or less inclusive. We have not pursued this approach for

a number of major intellectual and policy related assumptions that historically cannot be sustained in social science research.

One is that the full range of social, cultural, and political variables can be assessed, controlled, and measured in order to provide a rational plan for achieving the expressed goals of the educational system. Yet while research continues with this tacit assumption, its ironies are to continually point to the complexities of social systems that limit if not prevents such a knowledge of the totality in which planning is to procedure.

Second, if we think of the hallmark of political decision-making is that is depends on assessments of multiple and contingent interests and decisions that prescriptive and instrumental research is unable to satisfy.

Third, such research fails because research is always of the past. Its understandings of the present are through what has been and not what is or will be. The philosophy of science has long made the distinction between social and natural phenomena. This discussion can be expressed as the difference between atoms that do not know they are being talked about when called atoms and thus unaffected by language and meanings, and people where the categories and distinctions of social science, once made, become part of and influence the world in which we live. In a difference sense, for ideas to be useful, they need to be adequately conceptualised in order to consider their implications and consequences to the practices of policy. But this is not one that provide schemes for direct intervention but schemas that enable a public dialogue in which to think about possibilities.

As a result, our approach to policy implications is one that diagnostic in order to consider the relations between governance and social inclusion and exclusion. Rather than seeking to be prescriptive or didactic, our approach is to focus on the assumptions, implications and consequences of those relations as they are expressed in the educational restructuring and reform constituted across the spaces of the European Union. In this sense, our research intervention in policy is to explore the rules that organize policy so that those rules can be open for discussion about their possibilities and other alternatives.

1. *Reason as a Cultural Practice of Policy*: Policy needs to consider the significance of systems of reason that orders and classifies who is included and the excluded as a practice of governing. As we have argued, the principles that order the ‘problem-solving’ of policy and actors are not neutral but constructive and productive of educational practice. They should not be taken-for-granted.
2. *Two Different Politics in Policy*: Policy recommendations need to take into account two different elements of the politics of schooling. There is a politics related to who is represented and have access among different populational groups in a society and across the European Union space. But the politics of policy cannot only be concerned with whom benefits from organizational or pedagogical changes, but it needs to consider as well the principles generated to make the objects of schooling known, comprehensible and capable of action.
3. *Problematics of governing as both equity and of knowledge*: The ordering and dividing practices are not solely who is represented in school classrooms, such as

who has higher achievement, or who goes on to college or who drops-out. While these are important indicators of equity, policy also needs to address the systems of reason in schooling as establishing a continuum of values that normalize certain types of dispositions and capacities that qualify and disqualify individuals for participation. In this sense, policy needs to consider the two problematics of governing: that of equity and of knowledge.

4. *Topoi in Policies*: Policies need to carefully examine the different *topoi*, that is, banalities that are universally accepted as truth about social policy and thus seem as unquestionable. While rhetoric strategies are important to any document, policy needs to consider where rhetoric becomes a *topoi* and obscures rather than clarifies the issues under consideration.
5. *Understanding the Complexity of Policy*: The new calculus of intervention and displacement are being placed in policy. The organizational changes that are to call forth a new democratization of the school are more than procedures and processes of some pure notion of democracy but are inscriptions that embody particular ways of classifying and dividing the world and its objects for action.
6. *The Policies Of Decentralization/Centralization*: The policies of decentralization, for example, need to be considered in relation to that of centralization in the configuring and redesigning of the relation of the State as the arena for securing the obligations to its citizens and decentralization that focuses on local involvement and *partnership* for participation through civil society. The governing patterns in these new relationships for increasing participation are not straightforward and needs careful scrutiny.
7. *Neoliberalism and its Downside*: While notions of market, individualization, and more efficient local management of educational systems seem to have a certain orthodoxy in reforms, policy makers should consider the downside of such reform, such as how new patterns of segregation and exclusion are produced.
8. *How Kinds of People Who are Vested as Objects of Policy*: It is through considering the knowledge systems of educational practices that policy makers can consider how particular kinds of people are vested with the capacities and capabilities for action and thus groups and individuals are qualified and disqualified for participation.
9. *Practical Causality In Policy and Creating Notions of Deviance*: It is important that policy makers consider the practical causality inscribed in current policy through its systems of reason. The categories deployed in policy ‘say’ that certain phenomenon should be viewed as going together and how certain people are to be given attention in planning for a more equitable society. But the practical relations among the categories do establish a causality based on notions of deviancy and ironically, not making it possible for groups to be considered as normal and included.
10. *Universals About Learning, Curriculum, Students and Cultural Divisions*: Much of the data in this study points to how the pedagogical content of teaching and curriculum is organized through policy that seems as universal set of rules - rules about the growth and development of childhood, rules about the cultural values and

disciplines that children need to participate as a citizen in society, and the curriculum knowledge of school subjects that will produce the ‘knowledge society,’ among other universals. But policy makers should consider the rules of learning, pedagogy and curriculum are not universal rules about children and their development but particular historically mobilized divisions, norms, and displacements.

## **2 Background and objectives**

This research project had its background in two different but related backgrounds. The first was current restructuring measures of European educational systems in terms of decentralization, deregulation, marketization connected with changes in accountability and in management of schools. The second background was found in the research controversies concerning such restructuring and its implications for education and schooling.

In the restructuring of education changes in governance was considered to be of vital importance. Such governance changes is dealing with combinations of measures such as transitions in terms of (a) steering by rules and directives to steering by goals and results, (b) increased opportunities for parents and students to make choices at a market of schools, and (c) new ways to manage schools. Research controversies are mostly dealing with implications of such restructuring for qualities in the education process and for students with different social and cultural background. Questions are asked such as: Do education restructuring measures lead to an improvement or a deterioration of education? Is education restructuring contributing to an increased segregation in education and in society?

The EGSIE project started with the overall objective to identify relationships of education governance to social integration and exclusion of youth in European contexts and to discuss and propose policies on governance that will help to minimize social exclusion and maximize inclusion. We had the ambitions to clarify different positions within this field and to inform current discourses on education governance in Europe. Of special interest were students transitions between different levels or kinds of education or from education to work or unemployment. In order to reach this overall objective we put forwards the following subsidiary objectives:

- To review and analyse current research on education governance and social integration and exclusion among youth.
- To describe and analyse different national/regional systems of education in the context of educational traditions and governance strategies in different European countries.
- To describe and analyse the discourse on education governance in international organizations and the potential impact of this on national discourses.
- To analyse experiences of and strategies to deal with new governance structures in education among politicians and administrators as well as teachers and head-teachers in different European countries.

- To analyse national and international statistics on social integration and exclusion related to education.
- To describe and analyse implications of education governance for the social integration and exclusion of youth.
- To compare different national cases in Europe with a focus on relations between education governance and social integration and exclusion.
- To inform and discuss results and conclusions of our studies with education actors in different contexts.

During the research process we changed our perspective on education governance towards a more cultural understanding. Changes in education governance became considered as parts in transitions towards a “late modern” society. Thus, there was an increased need to capture changes in the systems of reason on education and in the making of subjects and citizens in terms of social inclusion and exclusion.

### **3 Scientific description of results and methodology**

#### **3.1 Introduction**

In this text we are dealing with recent and internationally widespread changes of education governance in different national contexts. Such changes are often described as a transition from a system of steering from behind towards a system of steering by means of goals and results. These transitions are coupled to patterns of deregulation and decentralization, and sometimes also to school choice and privatization of education. More precisely we focus on relations between changes in education governance on the one side and social inclusion and exclusion on the other side in order to consider changes that relate school, culture, and society to each other. We put forward two main empirical questions:

- What characterises the new governance structures of educational systems in different European countries and what are the conceived implications of this for social integration and exclusion?
- What are the implications of different national contexts for the social meaning of restructuring measures and the consequences of these measures in these contexts in terms of integration and exclusion?

Based on a research review of education governance and social integration and exclusion we organized research around three sets of theoretical questions concerning (a) narratives of changes in education governance, (b) constructions of teachers and students as subjects, and (c) relations between education governance and social inclusion and exclusion.

#### **National cases of an international movement.**

These questions made us organise an international research project with partners from a variety of European contexts: the Nordic welfare states of Finland, Iceland, and

Sweden; the Anglo-Saxon cases of England and Scotland; the Continental and unified Germany; and the Mediterranean cases of Greece, Portugal and Spain. Furthermore, our studies were carried out in co-operation with an Australian research team.

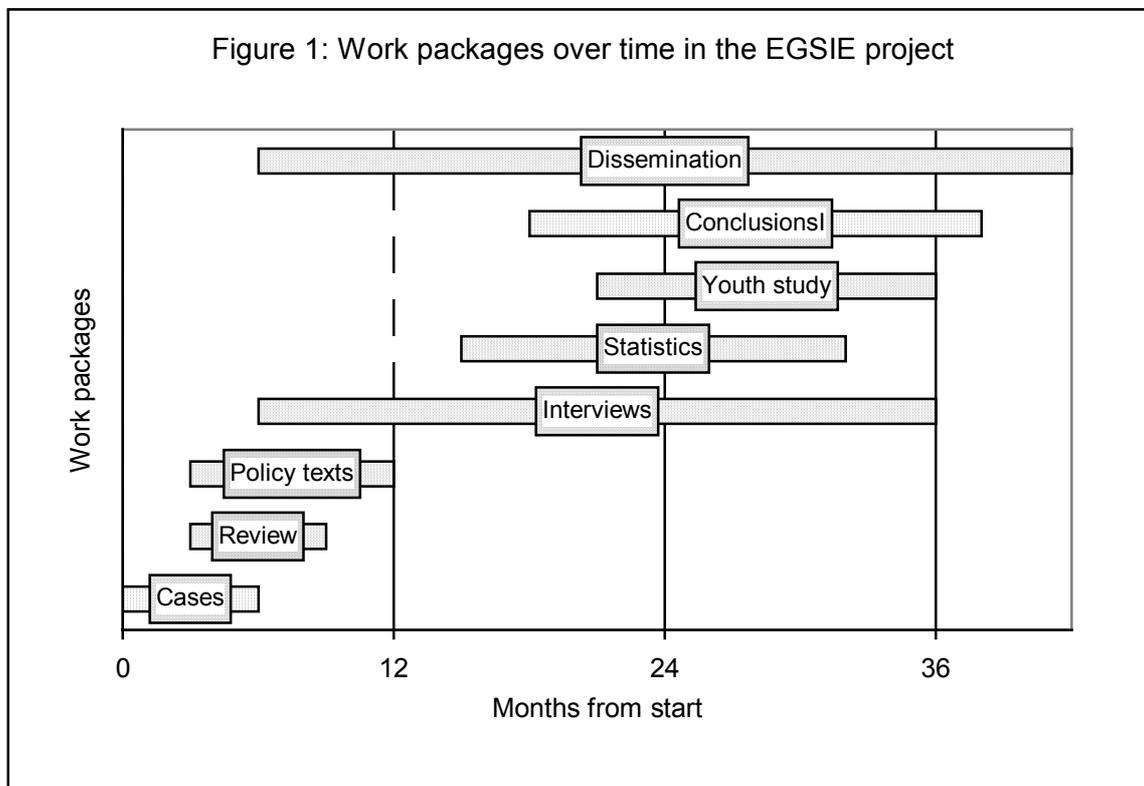
### Research trajectory

The EGSIE research was carried out as a set of work-packages with different functions in the total research process, as presented in table 3.1.

Table 3:1: Work organization in the EGSIE project. Labels, contents and annexes.

Label	Content and references
1. National case studies:	Descriptions of national cases with a focus on recent educational reforms and changes in education governance (Lindblad & Popkewitz, 1999; Annex 1).
2. Research review:	The research review focused on conceptual issues (Annex 2: Popkewitz, Lindblad & Strandberg, 1999; Popkewitz & Lindblad, 2000a). This review led us to formulate two basic and qualitatively different research problematics on equity and knowledge.
3. Text analysis of policy discourses:	A careful selection of important policy documents (n = 54) in each national and local context was subject to text analysis. By necessity different types of texts were selected in different contexts (Annex 3: Lindblad & Popkewitz, 2000b).
4. Listening to education actors:	Interviews with system actors (politicians and administrators at central and local levels) and school actors (teachers, head-teachers, and e.g. school nurses) working on different education levels. In sum 516 actors were interviewed (Annex 4: Lindblad & Popkewitz, 2001a).
5. Analysis of national and international statistics:	Uses of statistics in texts and among education actors were empirically identified. Based on these uses collection and analysis of international and national statistics were carried out. Of vital importance here is statistics as a system of reason (Annex 5: Lindblad & Popkewitz, 2001 b).
6. Survey studies of youth in four national cases:	A survey of students (n = 3 008) about to leave compulsory school in different national and local contexts was carried out. Results of analyses based on research-informed hypotheses are presented (Annex 6: Rinne, Kivirauma, Aro & Simola, 2000).
7. Summarising and concluding research:	Texts focusing on answers to theoretical questions in different national and local contexts in combination with overarching conclusions on transitions in education governance. (This report plus Annex 7:Lindblad & Popkewitz, 2001c, d).
8. Dissemination of results:	Results were disseminated to system and school actors in various ways. This is still in process in accordance with our plan. See section 5, this report.

The organization of these work packages over time is presented in figure 1. Here, we can note a few things. First, the cases studies (1) and review of research preceded the other work packages. Second, that the survey of the youth study anteceded work in all other work packages, since we used the other studies to formulate our field of study on youth. And third, that dissemination continues after the formal end of the research project.



With this overview we will now turn to the different parts in our research. We start with a general background informed by our research. Then we turn to the more specific results of the studies.

### **3.2 Considering social and historical contexts of the problematics**

At the end of the 19th century the French sociologist Emile Durkheim dealt with transitions from a traditional society to a modern society and the implications of that for social cohesion, integration, and fragmentation. *The social division of labour* was a result of his work to understand these social transitions. In Durkheim's work, education was considered as a means to produce social cohesion and conditions for solidarity. In many ways, we find ourselves today in a new situation, as questions of social cohesion are being reformulated and redefined through an amalgamation of institutional and political changes. Today's struggles are over identity as well as class, with a focus on minority rights and gender, for example. These struggles have produced new exclusions and taboo zones, as monolithic notions of identity within nations clash with the convictions of identities that are heterogeneous.

The struggles about social inclusion and exclusion are evident within Europe and the European Union. Long-term migration patterns have long been part of the European context. But the changing complexions of nationhood and issues of citizenship in changing migration patterns have made more visible the related issues of social cohesion and progress as a policy domain. Further, changes in the work patterns and educational requirements as the post-Fordist economies of the European Union were coupled with, for example, changes in the politics of cultural movements, such as in contemporary feminism, green movements, and multi-culturalism in many European states.

The problems of social cohesion, integration, and fragmentation are compounded by contradictory movements that join questions of citizenship with national and global cultural and economic practices. The European Union is a case in point.

But with the issues of integration and cohesion of the citizen are anxieties, disenfranchisements, and exclusions that have made school a central policy focus. From one perspective, school is one of the central credentialing agencies concerned with providing access and social progress. Schooling provides transition points for entrance to or exclusion from other arenas of society, particular occupational careers.

But schooling has also performed another function that interrelates and, at the same time, makes possible the subjectivities in which one can think of having a career in the spheres of the economic world. The world-wide institutionalization of the school since the 19th century has formed around the socialization the family and child. This socialization is not only about a productive worker, but also about the governing principles that order the dispositions and sensitivities in which the child or the adolescent acts and participates as a citizen. This introduces a second notion of governing principles that historically relates individuality to national identities and its tales of progress. This notion of governing gives attention to the principles through which problems are formed, the objects of rectification in policy ordered and differentiated, and the classifications that shape what is deemed as reasonable

possibilities for the future paths of reform. Both notions of governing – the processes through which actors gain or are denied access to decision-making and the principles of knowledge – have important implications for the issues through which individuals are qualified and disqualified for action and participation.

The problematic of the relation of governance to social inclusion and exclusion embodies a configuration of cultural, economy and social struggles. This section proceeds in the following way. We discuss the design and questions that guided the various case studies of the eight countries. In particular we focus on the relation of governance and inclusion and exclusion, as well as the concept of “transition” in thinking about the changes discussed in the European Union countries. Next we discuss some of the conceptual difficulties of current research and policy. This is followed by a discussion of two problematics in research about governance and inclusion/exclusion, what we call an *equity* and a *knowledge* problematic, respectively.

### Transitions: time and space continuum

We can think of the current situation within the European Union as one of a transition. The transition concept refers to changes over time – from an old to a new system or from changes of the characteristics of actors or conceptions of knowledge through which the objects of equity and justice are constructed. When we are talking about changes and transitions, we do not use criteria such as development or improvement, as such terms introduce a teleology of evolution and progress that are not historically useful for inquiry. We are interested in changes over time, but do not assume that these changes are of a certain quality.

At the same time, the transition points in economy are related to changes in cultural and political systems, such as those introduced in the media and politics which emphasize greater decentralization and restructuring of the fiscal politics and social/cultural securities nets of the welfare state. While decentralization and increased local decision-making is lauded as the furthering of democratic tendencies, it also has its implications for inclusion and exclusion.

We also need to consider the social spaces in which education is placed. At one level, the school systems of the countries in this study have developed educational and social infrastructures. Yet, within this general category of development there are also distinctions. While we can think of the participating nations as having high enrolment and graduate rates, there are differences among the nations in expenditures and relation of educational finances to gross national products. In most of the countries, the percentage in secondary school reaches 90% or above. In Greece, Spain, and Portugal, there is still a high educational rate, although the degree of urbanization and gross-national income are lower than those of the northern tier countries. Further, the comprehensive school is universal across the nations, but with variations in the ways in which streaming and tracking occurs. Finally, the economic climate across the countries has been relatively good since the middle of the 1990s.

The countries in our study have important and different positions within the EU and internationally. For example, some are centres in relation to mediating with periphery countries (Portugal), while being peripheral in the centres (that of the EU). At the same

time, we enter a caution that certain changes may on the surface seem significant (extending the years compulsory schooling, for example) as evidence of changes in access to school. But, as numerous research projects on compulsory schooling have indicated, such changes in organization of the school may not change the governing patterns in which the transitions are being culturally articulated within educational sectors.

Notions of transition can be put forward, such as: what do the changes in governance imply considering the school system and its agents, such as: the school as an institution, curriculum changes, teachers and teaching, students and studying. Furthermore, we ask: what do these changes imply considering premises, processes and consequences of schooling in terms of social inclusion/exclusion?

The transition notion is a way to go beneath the slogans about progress and education in Europe to consider those changes as historical events in which the categories of inclusion and exclusion and ways of governing through social policy are not only viewed as expressive of producing a more progressive society. The very policies and “data” of schooling are, in contrast, the events to be interrogated and scrutinized for what can be understood about the transitions themselves. That is, the new ways to govern education and the modernization of the school as an institution, the curricula that embody new constructions of students and teachers as well as new ways of working are examined to provide a diagnosis of the changes occurring

This sense of transition also enables us to think about transitions through a varied notion of time/space. The changes that are now appearing are not a single or progressive movement. It is a time that moves in different trajectories — changes in the economy, for example, are not one as older technologies of mass production move in relation to the new economies of “just-in-time” production. These changes also coincide with changes in cultural fields as uncertainty, flexibility and ambiguities arise in thinking about change and identity.

These elements of time and space as related to the idea of transition can be also considered practically as we further explore the relations of governance and inclusion/exclusion.

### **3.3 Schooling, governing, and social inclusion/exclusion**

At first glance, the relation of governance to social inclusion and exclusion seems obvious, almost natural. What was interesting as we started this research is how deeply ingrained is this belief in the rationality of planning in different institutional contexts, from state policy-making to the social science research that investigates problems of social integration and exclusion. The relation of governance and social inclusion and exclusion were taken for granted. It is assumed that state planning functions are governing mechanism in producing social progress.

In our research, the assumption of governance in policy practices is not so much challenged, but rather diagnosed, with reference to how it functions and some of its implications. In this sense, our ambition is to find out implications of transitions in education governance for education and its consequences. Our second ambition is to

consider the fabrications of policy and research through which the subject of inclusion and exclusion are constructed. We use the notion of fabrication in its dual sense, that is, as a fiction and as making. The category of “minority” is a case in point as it is a kind of person that is invented to respond to certain perceived issues of, for example, poverty, marginalization, and exclusion. But the category of minority is not only a fiction, as anyone familiar with welfare policies knows. It is acted on as “real” and is one that circulates not only among policy makers and researchers but also among those who are so classified.

### **Some Conceptual Difficulties with the Idea of Social Inclusion and Exclusion**

While we found no conceptual discussion of the governance in our review of research, there was some discussion of the conceptual difficulties in the concepts of inclusion and exclusion.

One of the major difficulties is that governance is assumed and not theorized in policy or research. At this moment we will focus on other issues that emerged in how social inclusion and exclusion were conceptualized in contemporary research. Some of these difficulties can be outlined as:

First, social policy and research often coincide with the classification of groups to be included or deviant. A consequence of this tendency is that such research conserves the political systems of reference through accepting the categories of political practices as the categories of scrutiny in research.

Second, there is a continual dilemma of value and normativity that entails contrasting purposes of modern schooling that can and do collide in how problems of inclusion and exclusion are explored.

Third, the concept of social inclusion can subsume and thus obscure a more focused discussion of social issues that was previously given attention through concepts of participation, citizenship, and racism.

### **Governance and inclusion/exclusion**

We think of schooling as a complex and ambivalent project. The governance of schooling and education is a highly critical aspect of the joining of questions about what knowledge and practices are necessary for social and economic access, but also what subjectivities are to be produced so that individuals can participate and act in productive ways. In asking this question, there is a recognition that schooling not only provides the procedural access for social participation but that it is about the types of individuality that are possible in society. It is here, at this point of normalizing particular types of people, that we can begin to think of a different way in which inclusion and exclusion can be considered. This approach focuses on the divisions that make and differentiate types of people as generating principles that qualify and disqualify individuals to act and participation. It is this duality of inclusion and exclusion in schooling, teaching, and childhood that we will continually turn our attention to in this report.

## Two problematics of social inclusion and exclusion

We can think further about the relations between governance and the importance of social inclusion/exclusion for our study through two different paths or problematics for investigation (Popkewitz and Lindblad, 2000). One is considered as the equity problematic, the other as the knowledge problematic. We call the different approaches problematics to emphasize how the methods of science, concepts and “theories” of social affairs organize the construction of educational problems and overlap with policy discourses to generate rules that govern the problem of social inclusion/exclusion. In the two problematics of equity and of knowledge are not only ways of conceptualizing a relation of governance and inclusion/exclusion, but they also embody complimentary ways of organising, interpreting and constructing the possibilities of change and of thinking about the transitions that are occurring

We can differentiate between the problematic of equity and the problematic of knowledge in the following ways. The equity problematic treats governance of inclusion and exclusion as a problem of access and participation in the representation of groups or populations, typically classified through categories of race, class, and gender. The knowledge problematic considers the construction of the “qualities” that distinguish and differentiate the individual being for action and participation. It is not race, gender, or class that is the central concern of research, but the production of race-ness, gender-ness, or class-ness of individuality. The practices of normalization and division embodied in systems of reason are not what are commonly considered as the biases, stereotypes, or beliefs through which people act. Rather, the normalizations are realized through the distinctions, differentiations and categories which construct the inner qualities and capabilities of the individual (such as, the dispositions associated with a child’s “self-esteem”, the “stages of child development”, or the cognitive, rational characteristics of a “learner”). The knowledge problematic governs through the distinctions, differentiations, and categories that construct identities for action and participation. The exclusion and inclusion together (inclusion/exclusion), are embedded in principles of reason (the distinctions, differentiations and categories of knowledge) which are divisions that simultaneously create an inside and outside.

Each problematic embodies different notions of change. The equity problematic is to scrutinize the points of access and organizational processes through which access and participation occur. The positive outcome of policy is to eliminate exclusion through full inclusion. The problem of governance in the knowledge problematic is related to the duality of inclusion/exclusion. Change is tied to the diagnostic of the present, that is, to disturb “that which forms that groundwork of the present, to make once more strange and to cause us to wonder how it came to appear so natural” (Rose, 1999, p. 58). To show the contingency of the arrangement that we live by is to show how thought has played a part in holding those arrangements together and to contest the strategies that govern human possibilities.

### **3.4 Problematics, theoretical questions and design**

Changes in education governance are part of cultural complexities – for instance in systems of reasoning – as well as in relations between citizens and the state. Thus, it is

necessary to avoid a technical conceptualization of the problem in focus. Instead, it is important to capture the problem as part of a cultural pattern of reproduction and change.

It is the ambition of the EGSIE project to be interpretative of relations that are historical as well as empirical in the sense that we treat the texts and the interviews of significant actors in the field of education as exemplar, or monuments, to the cultural patterns and governing practices that are related to issues of inclusion and exclusion. Our study departs from existing studies in that we consider the organizational procedures and policy rules as governing practices about access to participation; the rules and standards that order teaching, learning, and the notions of the student or the child are also considered. These rules and standards embody distinctions, differentiations and divisions that normalize the characteristics of the healthy, active, and competent child or adolescent.

The design is built around the two problematics described above. Within an equity problematic we study the construction of the educational system and relate that to the distribution of resources among different categories such as gender, ethnicity and social class. In this way we find out what “the playing field” looks like in terms social inclusion and exclusion and the implications of this in terms of integration and segregation in society. Here we look for information concerning access to education, enrolment, as well as drop-out rates and unemployment.

Within a knowledge problematic we focus on the systems of reason that construct or reproduce the playing field of social inclusion and exclusion. This is a highly important aspect in the EGSIE project, since it is our main ambition to understand how education governance and social inclusion and exclusion work as cultural phenomena. The theoretical questions below are of interest within an equity problematic as well as a knowledge problematic. However, they are based on a knowledge problematic – which turned into the key problematic in our research.

### Theoretical questions

This study is organized around three sets of theoretical questions based on the perspectives and analyses presented above. Our research task has been to develop answers on these questions in different contexts and by means of different sources. In table 1.1 the theoretical questions are summarized

*Table 3.2:* Theoretical questions for studies on education governance and social inclusion and exclusion.

<i>I. Constructing narratives:</i>	A. What are the stories of progress and its denials? B. What are the images, myths and sagas that are to place people into a collective whole.
<i>II. Constructing subjects:</i>	A. What are the concepts of the individual? B. What are the silences in these constructions of subjects?
<i>III. Constructing governance and social inclusion/exclusion:</i>	A. How do the constructions of narratives and subjects produce systems of governance and social inclusion and exclusion? B. What are the conceived or constructed relationships between

systems of governance and systems of social inclusion and exclusion?
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## Design

The notions of cases are considered as potential patterns of information on structures and relations in order to get answers on the theoretically significant questions (Kazamias, Lindblad and Popkewitz, 1999).

The national cases consists of three Mediterranean states – *Greece, Spain, and Portugal* – and three Nordic welfare states under reconstruction – Finland, Iceland, and Sweden. To these are added the UK cases – *England and Scotland*, with a recent neo-liberal history, similar to that of *Australia*. Finally, from Continental Europe we have *Germany*, with links to Eastern as well as Western Europe.

Our studies are designed to capture different levels in the education system and to make use of different sources of information:

- Text analyses of significant texts dealing with the reconstruction of the education governance system.
- Interviews with politicians and administrators in the education field (n = 136).
- Interviews with school actors in different local sites: head-teachers, teachers, school nurses and so forth in compulsory and post-compulsory education (n = 380).
- Reanalyses of national and international statistics on education and social inclusion and exclusion.

In addition to these studies we carried out studies of adolescents in five cases – Finland, Sweden, Portugal, Spain and Australia selected according to different ways of organizing education:

- Surveys directed to samples of students in the last year of compulsory education in the sites studied (n = 3 008).

A main point in this design is the use of different sources for analyses positioned at different levels of education systems in different national contexts. Thus, we are constructing and analyzing data emanating from different social circumstances.

Below we summarise findings in the different studies.

### **3.5 Case studies – educational reforms and changes in education governance**

What are the common aspects in the national cases and what are the distinctions necessary to capture in order to understand transitions in education governance and the implications of such transitions? Each research team presented their case as a basis for joint reflections in our research. This was presented in Lindblad and Popkewitz (1999). Our studies showed, for instance, quite distinct changing contexts for educational reforms such as the rise and fall of dictatorships, as well as the restructuring of welfare states. This was combined with ambiguity and complexity in recent tendencies in educational change as well as in discourses concerning such tendencies and changes.

From this point of view changes in education governance can be regarded as part and parcel of ongoing and ambiguous modernization in the current societies. We realized the impact of international organizations – such as the OECD – on the making of education policy agendas in national contexts.

### **3.6 Research review and equity and knowledge problematics**

In the EGSIE project we decided to present as early as possible a critical literature review concerning different theoretical perspectives and conceived results from research dealing with education governance and social integration and exclusion. Our method used to carry out the task was as follows:

To ask each participant in EGSIE to review national discourses on education governance and social integration and exclusion.

To explore existing databases – in practice the Science Citation Index and the Arts and Humanities Citation Index as well as ERIC Education Resources – in order to gather information on research from a variety of approaches.

To analyze concepts and relations between concepts on the basis of our outline of research as presented in the proposal, as well as in different texts from EGSIE partners.

The results of this work are presented by Popkewitz, Lindblad and Strandberg (1999), where work procedures, descriptors as well as results, are displayed. Using individual descriptors in the ERIC system produced thousands of references (e.g. governance produced 7,456 references at that time, and social integration 2,385 references, for instance, in the ERIC system). But combinations between these research fields were rare. Thus, in the ERIC we ended up with 41 references to research that dealt with education governance (and related terms) and social integration or exclusion (and related terms) on the other hand. With such work procedures relations between education governance on one side and social inclusion and exclusion on the other hand seemed to be “under-researched” considering current changes in education. However, since we used two different strategies we found several other texts dealing with our research field. In sum the research review based on the two strategies dealt with 203 articles and books.

Over to the findings: This review focused on research approaches and theoretical concepts and categories. Thus, it did not have the empiristic stance – focusing on methods and results – that is rather common in reviews of research in the social sciences.

#### **Focus**

Our review has two foci. The first focus is on education governance and related concepts and the other is on the social integration and exclusion of youth. Considering the first focus, there are a lots of texts dealing with this issue. A good example here is Gösta Esping-Andersen’s (1996) work on recent policy changes in Europe and other countries that he calls, “welfare states in transition”. Esping-Andersen presents different routes among welfare states to deal with internal as well as external factors that threaten welfare states -how to deal with increasing global competition leading to demands to

devalue the labour force in Scandinavia, for example. His emphasis is on education reforms as producing increased job qualifications and thus providing the greatest benefit to society in the long run.<sup>1</sup> Within the field of education research a number of studies have dealt with restructuring of education in terms of deregulation, decentralization, marketization and so forth.

The other focus deals with social integration and exclusion – especially on youth. Here we find studies dealing with e.g. exclusion in different ways; e.g. the merit value of education in relation to the labour market and the percentage of students that take a certain exam, e.g. from upper secondary education; or studies on gender, class and ethnicity as well as the consequences of being disabled.<sup>2</sup>

Connections between these two fields of research are relatively few in number.

In exploring these different problematics, this research project recognizes a need to join the equity and knowledge problematics. This joining of the two problematics, however, is not merely an additive problem of doing a little of one (equity) and a little of the other (discursive analyses). It is, we believe, rethinking the conceptual ways in which we have organized research on governance and inclusion/exclusion. We can think of our concern in this research as understanding the relations of the groups of actors influential in educational decision-making and the discursive rules about inclusion/exclusion deployed to construct the subjects and subjectivities that differentiate the different groups. This is not an equity problem nor it is solely one of knowledge, per se, but a relational question of fields of interaction.

## Conclusions and comments

For our purposes, we thought of inclusion and exclusion as a single concept, mutually related. Further, we sought to consider two different types of relations between the concept of governance and inclusion/exclusion: that of the problematic of equity and of knowledge. We assume that as our work moves further into the case studies and their comparative implications, these conceptual relations of the two problematics will be revised and re-examined.

For analytically purposes, we focused first on the relation of governance and inclusion/exclusion as a problematic of equity. This dominant problematic has many variations and different ideological agendas but can be summarized as defining the issue of governance through examining the policies and practices through which individuals and groups are given access and opportunity to participate in social, economic, and cultural activities. Class concepts and access to labour markets are the most prominent in this approach although concepts related to ethnicity, race, and gender have assumed greater prevalence in recent years. The particular mix and emphasis depended on the national context.

In the equity approach, we argued that the problem is generally to find the most effective ways to promote inclusion. Inclusion is often treated as an absolute term where

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<sup>1</sup> Esping-Andersen (1996, p 255f)

<sup>2</sup> See e.g. Lindblad, 1994

there is belief that, at least hypothetically, there exists a final point that is totally inclusive. Thus the concept of exclusion stands only for a different point that will eventually be eliminated through wise policy and governance practices.<sup>3</sup> When the equity approach is viewed at a macro level, it assumes governance and inclusion/exclusion tied to structural concepts. One prominent structural category is the State as an actor whose legislation, admission policies and steering efforts govern through fiscal policy, legislation, and bureaucratic practices. At a system level, conceptualization of neoliberalism and marketization of education provides one example of current policy research concerned with a problematic of equity, even when the literature is critical of the basic assumptions of the policy orientation. Discussions of decentralization are another category of governance that is linked to practices of inclusion and exclusion.

Our second conceptual discussion related to governance and inclusion/exclusion as related to a problematic of knowledge. This problematic focuses on the ways in which the rules and standards of reason organize principles that function to qualify and disqualify individuals at the level of being, that is, the dispositions, sensitivities and awarenesses that govern participation and action.

### **3.7 Studies in policy discourses**

#### **Introduction**

In this study we focus on texts that in different ways deal with transitions in education governance- sometimes through legal-administrative and financial changes in the structuring of education (e.g., decentralization or deregulation), sometimes through creating quasi- markets; sometimes through a normative steering in the symbolic formulations of professionalization and pedagogical practices, and other times through a rhetoric (*topoi*) that inscribes certain universal truths in the process of education. Since each country has different legal-administrative and rhetorical structures, the selection of texts in the following analysis varies according to national context. The texts are chosen in light of their importance within the ongoing debates and historical configurations through which each country is re-constructing educational systems and its allocation of resources in education. The study of multiple texts is viewed as (a) 'telling' about the means by which the activities of schools are controlled or directed in relation to some social standard; (b) generating principles through which the "problem-solving" of action and participation are to occur.

Our analysis starts within the specific contexts of regions or states as a basis for a joint analysis of discourses and texts regulating education. The central discursive strategies are "units of ideas". In the analysis, the interpretative strategies draw on multiple disciplines that include social and political theories of the state, current literary theories that consider the rhetoric the logic of the text, and the silences in the text, drawing on a post-colonial literature concerned with issues of exclusion.

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<sup>3</sup> There are exceptions from this. Thus, e.g. reproduction theories deal with reasons for reproduction of social inequalities (see e.g. Bourdeiu & Passeron, 1977) or state that school cannot compensate for society.

*On text analysis and text selection*

Given the international comparative nature of our study, and the basic recognition that each individual country will have its own unique set of policy texts from which to select, some shared points of comparison (at least analytically) were needed to be constructed for our work in policy text analysis.

Basic/Logistic Parameters: Given that we have been flexible in our temporal delineation (with each national case being constructed on the basis of time frames that make sense for that nation), it makes sense that we also choose our policy texts in relation to each individual nation's relevant time frame.

Analytical Parameters: Three main analytical parameters were listed thus:

1. Texts should be selected to be directly responsive to the main issue of the study: changes in relationship between educational governance and social inclusion/exclusion. This implies at least two analytical constructs in need of textual referent: "governance"
2. And "social inclusion/ exclusion".
3. Texts should be selected to canvass main areas of educational reform/ restructuring already documented in international policy and comparative analyses. That is, within the broad debates on educational restructuring, we might focus on three areas: clients (subjects/groups that are designated as needing attention in the official policy statements), organization (to include budget, personnel and management issues), and curriculum (understood broadly). We will need *all* nations to analyse each of these areas. In this sense, the texts will need to be "representative" of their respective systems.
4. At least one text should be selected for detailed discursive analysis that is not of obvious or apparent descriptive utility but that is highly instructive for understanding the shifting boundaries between "the normal and the pathological".

*Comments on contexts where texts are put*

When we deal with transitions in education we also deal with a changing context of education. In our cases we found different patterns here:

In Finland and Sweden, and to some extent in Iceland, the context is the welfare state – its rise and eventual decline. Changes in the welfare state frame the presentation of these texts. Perhaps, this is linked to some kind of "uncritical heritage" in conceptions of the strong welfare state on one side and the risk of overestimating recent changes, as noted in the Swedish chapter. As a subtext in the Finnish case we find examples of a rather strong educational scientism – or faith in science when constructing educational systems. In Germany the context is different. Since there is a federal structure there are problems in defining a specific national context. In the texts used we find three important contexts. The first deals with issues of autonomy or heteronym in the German case and how to situate educational systems in this sense. Is schooling to work as an integrating system in the federal state and should schools get increased autonomy? The second issue deals with immigration and "the German identity" as dealt with by right-

wing political parties. And the third deals with the integration of the former DDR in the “new” Germany. In Portugal and Spain transition towards a welfare state is a context of vital importance. In Portugal we note the constraints between modernization and democratization and the problem of constructing a legitimate and efficient education system. In Spain we find a similar pattern. In Spain, issues of central and federal control and school autonomy are of specific importance. In that sense it is similar to the German and the Scottish cases. Besides that, youth unemployment serves as a background for social inclusion/exclusion. Greece is an example similar to the Nordic cases in the way reform failures serve as the context for recent transitions. A recurrent theme here is the problem of centralism, with the difference that the Nordic education systems are decentralized. In England the texts are located in a “post-utopian” context, where markets as well as left romantic strategies are replaced by the third way by the Blair government. In a way the context is the start of New Labour in education. A last notion here: one simple way to make distinctions between the national cases is the development of a welfare state; Portugal, Spain and Greece seem to be moving into a position that the Nordic cases are leaving.

#### *Selection of texts*

Our selection of texts varied in the countries. In all but one country, legislative, governmental administrative or legal documents were used as central documents for analysis. Germany’s decentralized administrative organization of education produces an analysis that was directed to the statements on education made by the various political parties. In addition, some of the analyses began their analysis in the past to provide a sense of development and change while others maintained a focus on the present. Finally, the documents examined included local or regional guidelines in changing schools, union policy statements and academic expert statements, where those actors have become influential in the formulation of policy, such as in England. These distinctions among the various nations reflect the different historical positioning of the school system within the political system as well as responding to the changes in the state traditions for steering education.

*Table 3.3: Overview over selection of texts for analysis.*

National cases	Texts selected
Finland	Different governmental, legislative and administrative texts. In sum 16 texts
Germany	Documents from political parties dealing with education policy issues. In sum 7 texts plus press releases
Greece	One policy document from the ministry of education, three laws, plus one speech
Iceland	One document from the Education ministry, one document from the Finance Ministry on contract management and one Education Ministry booklet on self-evaluation policy (1998)
Portugal	In sum 7 documents; guidelines for education, guidelines of educational policy. Two documents for creation of conditions for changes
Spain	In sum 7 documents; five law texts, one party platform and one government white paper
Sweden	In sum 5 documents: two Government Bills and two government programmes for development of education plus on a development programme as an agreement between the teacher unions and the local authority union
UK: England	In sum 3 texts: one Government White Paper, one educational researcher policy essay, plus Government press releases
UK: Scotland	Two Scottish Office documents plus policy document from the General Teaching Council

In table 3.3 we present an overview of texts selected in the different cases. It must be added that a large number of other texts are referred to in the different cases.

### Summarizing findings as answers to theoretical questions

#### *National cases and international patterns*

This issue of context involves both historical and socio-political issues. In most of the studies, there is a local and global context in which the reports are written. One simple example of the relation of local and global not presented in this work package but part of our larger work is the circulation of international educational statistics. They are points of reference by system actors in discussions of the priorities and standards to measure progress.

The local is the need for the nation to respond to these changes globally but at the same time the local, nation-state has an importance in developing a new sense of identity in which the image of the nation is related to a new internationalism of economy. Thus the nation-hood of the citizen has a bifocal quality of a citizen in these reports, one who is international in relating to changes in work and of a collective interconnected world that is broader than the nation-state and, at the same time without overmuch tension, one whose sense of belonging is also within the cultural "home" in the nation-state.

In this sense, we can read the texts as part of a new nationalism that responds to the changing position of the nation within an international setting (European as well as broader contexts) and with changes to its identities through immigration and changing migration patterns being felt within the nation. Finally, there is an effort in each of the text analysis to provide some historical background in which to understand the governmental and political texts analyzed.

In our cases we do not only learn about policy discourses in different national contexts with different social and historical backgrounds. We learn about the impact of international organizations and agencies dealing with education matters. There is a need to focus on these organizations and their work in the future!

### *Changes in Governance*

Notions of governance were in focus in the analyzed texts. The general trend involves changes in the welfare state as it relates to the provisions of providing security and containing risk. Thus, we can read the changes in governance in the text analyses as a reformulation of the relation of the state to the citizen rather than, as some commentators have argued, “a crisis of the welfare state”. Two discursive images appear in the report: that of the state, economy, and citizen in a *partnership* and that of the *pact* between the state and its citizens in providing for the collective good. At one level, the two distinctions of *partnership* and *pact* can be read to a continuing obligation of state governance in providing social welfare. But the distinctions also emphasize different systems of governing within a broad concept of the welfare state.

The English case is one such illustration in discussing partnership and demands of standards is thought of as involving a set of relations between the state, business, professionals, civic associations, parents and communities. But the partnership is itself to be steered through standards of curriculum and outcome performance objects as with the governing policies of those who use the word “pact”. In a way, there are tendencies in the practices of partnership toward a new centralism in the discourse compared to e.g. the Nordic cases where decentralization is on the agenda in various forms. The notion of partnership is in a way present in the Portuguese Pact as well, as a practice of describing the reforms in order to construct consensus and to avoid politicization of educational matters.

In different ways we find constellations of subjects or citizens and the state when dealing with governance.

In the Icelandic and Swedish cases the texts deal with user control of education in contrast to centralized governance. In texts from Greece, Portugal and Spain relations between private and public education are of importance but with different outlooks, depending on the form and extent of private education. Techniques of governance are present in the Nordic cases in terms of contracts, evaluation, resource allocation and so forth while the German and Southern cases are dealing with governance changes as principal or normative matters. The changes in governance have produced new forms of expertise as produced in the centralized/decentralized patterns found in most of the reports.

We found different phrases to discuss the new governing patterns and expertise: “Autonomy under Tutelage”, the movement from “the Educating State to the Regulating State”, “Informative Steering” in which influence is produced through the distribution of knowledge and the evaluation of results. These different phrases, we believe, capture significant changes in how school systems are being governed. They point to the ways in which centralization and decentralization/deregulation are more complex than commonly assumed in policy studies and which have implications for the patterns of inclusion/exclusion that need to be explored in this study.

The reports also direct attention to governance at two levels. One is of the principles of organization and control of processes. There is an end of the central management that has been associated with the strong welfare state to a managerialism and myth of market in which education is to serve individuals. The other governance is that of *habitus*, that

is, the increased concern with the inner qualities and dispositions of the individual through, for example, work in human relations and school-community-parent education, that emphasize how people use information and communication technologies. We will return to this below under the topic of the construction of the subject.

### *Narratives*

The current study contains different narratives on educational transitions related to restructuring and governance in different national cases. In several cases we find two parallel sets of stories, one on democratization and one on modernization.

There is a particular style of constructing narratives of educational transitions that tells stories of progress through the grammar and rhetorical styles of science. This use of science to tell of progress is not a new phenomenon as most nation-states in Europe sought to engage in modernization through the use of scientific expertise after World War Two. The mobilization of science to rationalize educational systems was a strategy of the state as it sought to provide educational systems that were both more efficient in training and more equitable in relation to State democratic concerns. Education is part of the stories of social progress and improved quality of life for the citizens. In these stories we can situate science in different ways.

At the same time, the narratives embodied new *topoi*, or slogans that are accepted as universal truths that need no explanation or questioning but which are to coalesce and mobilize public opinion in the process of reform. Different phrases are present as objects of community consensus, such as everyone “knows” what is meant by “quality of education”, “the knowledge society”, “lifelong learning”, “education and training”. Such phrases enable a belief in a generalized agreement about directions of reform and social progress without any need for definition.

Finally, narratives presented in texts are often constructed with a theme of necessity in them – there was no choice or alternative to restructuring of education. It can be argued that this theme is a theme of tragedy – development or international economic competition demands changes in education – and there is no other way than the one taken. But in these narratives we find new heroes – e.g. the school leaders – who will make the future possible. Or is it the old story of Sisyphos once again?

### *Construction of subjects*

In the texts we find new constructions of subjects – new students as well as new teachers and citizens. This is highly visible in the Finnish case, where the authors write about a tide break in this respect concerning students. In the Portuguese case we find a redefinition of the humanist project and in Iceland there are constructions of the child as a competitive, rational and independent consumer. Similar constructions of children or students are present in most cases.

Considering teachers we find new constructions as well (though not new if you are acquainted with the last decades of research on teachers and teachers’ work). The new teacher in the reports can be understood as a “counsellor”, a “reflective facilitator”, who is directed by goals established in advance and whose procedures for assessment,

evaluation and measurement of outcomes are used to control outcomes rather than processes.

Underlying the reports is a new individualization of the teacher and the child. The Finnish case, for example, discusses this as the movement from the citizen to the individual. Whereas previous reforms placed the individual in relation to concerns about the citizen who contributed to the collective, social development, today's reforms point not to citizens improving society but to ethical education and to the role of the pupil as an active learner and the development of talent. The student becomes an active rational subject who uses services offered by the school. This new individualism relates to an active cooperation in an international world where human rights are not related to a generalized solidarity with the rest of the world but are embodied in the qualities of the individual who is in a constant state of flux.

The text reports also place a new emphasis on the families and the child as agents of change.

We can think of the new constructions as one of networks. As everything is changing quickly social competence and self-governing require a system that is handled through associations that are varied and flexible rather than uniform.

To us, these changes indicate not only changes in education governance but also constructions of new education projects. We can speak of the changes through talking about a shift of focus from education of responsible citizens to motivated consumers. The teacher, the child, and the school administrator are constructed as not only with the right knowledge but also with the personal traits and dispositions, and social and cognitive competencies that are thought of as necessary for the future.

#### *Social inclusion/exclusion*

We can read the current reform texts as often focusing on inclusion and exclusion through universalizing categories by categories of cause and victims of circumstances: unemployment, poor skills, low income, high crime environment or family breakdown.

We can also view these terms as functioning as *topoi* discussed earlier, such as new governance schemes: "risk zones", "special needs" ethnic changes, increased differentiation of wealth and advantage. These words are deployed in texts to emphasize the inclusiveness and fairness of policy and governance strategies by targeting categories that point to differences from what are considered normal. But what becomes clear when looking at these categories of policy and governance strategies is that the *topoi* are assumed to point to real people without questioning the meaning or the norms that are inscribed about difference. What is not interrogated in the policy texts is how such distinctions of policy construct difference along a continuum of norms that define a standard of sameness.

### **3.8 *Listening to education actors***

Our studies are based on interviews with politicians and administrators – what we call “system actors” and teachers and head-teachers – what we call “school actors”.

## Background

We can think of the current situation within the European Union as one of a transition. The transition concept refers to changes over time – from an old to a new system or from changes of the characteristics of actors or conceptions of knowledge through which the objects of equity and justice are constructed. We are interested in changes over time but do not assume that these changes are of a certain quality. Furthermore, we do not mean that changes are “for real everywhere and for everyone”.

Looking at the professional actors in educational settings in transition we find connections to different research positions and focuses. Let us just present a short overview

A first position is dealing with changes in *organization* or management of schooling. Here we find approaches based on neo-rational organization theory on one side with a focus on tasks presented by mandators and the authority and legitimation in and of the organization. Micro-political studies, on the other side, are focusing on the “dark sides” of organization such as strategic issues in terms of self-interest and competition of positions in the organization. These discourses focusing on organizations are often combined with issues of management of education and schools or with a criticism of ways of managing education.

From a second position researchers are focusing on the *experiences* of actors in education – for instance using a life history approach, with a special interest in gathering information about education actors’ professional world or with an emphasis on the ways experiences are organized. Sometimes related to the former position but with a focus on *interaction* we find a third position. Here the focus is on the actors’ perspectives and strategies related to definitions of the situation (Woods, 1990).

A fourth position is taken by researchers focusing on the *cognitive modelling* of acting in schools. Here experts are compared to novices and their professional problem-solving is described and compared in order to identify what is significant for a professionally competent actor (e. g. Wittrock, 1986).

And fifthly, we have studies focusing on professionalism and professionalization of education actors. Here, professionalism refers to the competence and knowledge base among professional actors, while professionalization deals with issues of social status and inclusion/exclusion in the profession (Carlgren & Lindblad, 1991).

There is also a sixth position that can be taken in research that we both incorporate and use to provide an alternative reading. That sixth position is the work on school as part of the world system. This work begins with the assumption that schooling has occurred as part of the development of a world system that is more than what can be understood through focusing on individual nations.

In important respects, the EGSIE study moves along parallel theoretical lines as the world-system theory of schooling. We are concerned with how different systems of social and cultural practices are forming and reforming in the modern school. Our focus, however, is both more concrete and also broader than the world-systems studies. Within the European Union arena, our focus is empirically on a range of phenomena through which the modern school has formed and is changing in relation to its social

and cultural environment. Further, our explicit concern is with governing functions with knowledge, governing functions through which the processes of modernization are occurring. Finally, rather than assuming a world system that has homogenization of images and narratives of schooling, we are investigating how the universalizing qualities of the modern school actually differentiate and divide, a central issue in the understanding of social inclusion and exclusion.

As a consequence, the methodological approach of the EGSIE study provides a way of methodologically exploring how the school is embedded in a world system that is changing historically. It contributes to both sociological and educational research through its interdisciplinary quality. And it provides empirical approaches to understanding the relationship of institutional, actor, and knowledge practices of schooling.

### **Purpose**

Our study is organized around three sets of theoretical questions based on the perspectives and analyses presented above. Here we are focusing on education actors and the ways they deal with issues related to their experiences, practices and reflection on transitions in their work

### **Research approach**

Our studies are based on interviews with different kinds of actors at different levels in the education system. Constructions of questions were dependent on local circumstances. In sum we interviewed 156 system actors on central and local levels. Considering school actors, we have chosen to interview samples of head-teachers and teachers (in sum 380) at the same level as the local system actors. The interviewees are presented according to categories and cases in table 3.4.

Table 3.4: Categories of school actors over national cases. Numbers.

Case	System and School actors	System actors	School actors			Total
			Head teachers	Teachers	Others	
Australia	29	17	8	4	0	12
Finland	69	26	17	18	8	43
Germany	38	4	17	17	0	34
Greece	44	11	17	14	2	33
Iceland	59	13	22	24	0	46
Portugal	41	10	6	25	0	31
Spain*	83	13	30	25	15	70
Sweden	54	12	8	26	8	42
UK E	76	39	36	21	0	57
UK S	23	11	0	8	4	12
Total	516	156	161	182	37	380

In Spain were also actors from unions, employers organisation and parents associations interviewed. They are not included in the table.

In the respective chapters the reader is presented with more precise information about the studies and selection of interviewees.

## Conclusions:

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### *Introduction: Fatalism and Consensus toward the Changes*

We did not find as much difference among the different level of actors as we might have expected. In all of the school systems, system actors were experiencing a need for change and a fatalism about change. The feeling about change was expressed through the Portuguese case study in which they discussed the fatalism toward and a consensus about the changes occurring.

The fatalism was expressed as one of globalism of the changes which influence national school systems. In Iceland, this was expressed as the attempts [to tame the change] and change as “the wild thing”.

In many instances, the respondents felt that the changes were authorless. Change appeared as the product of anonymous forces of society in which there seems to be no author – political, culture, economic – that is requesting change.

In some cases, the fatalism was given an [author] but with different faces of *topoi*, that is, banalities that are universally accepted to become truth and thus do not need to be questioned. One authorless *topoi* was the economic changes in a *global, knowledge society*. The Greek study suggests that concepts of egalitarianism/equity and democratization of education dominated the 1980s discussion but were revised in the 1990s through new discourses. These discourses linked education to modernization in a globalized society, and the needs of economy and society of knowledge through a holistic reform in education. The phrases were banalities that were assumed to be known by everyone but which have no points of reference or specificity other than as mobilizing a seeming consensus about change.

Another anonymous face was that of the European Union, which served as a generalized object to explain the purposes and directions of local actions. In the case of the Greek context, the European Union was symbolically positioned in relation to the

political regime. System actors located the source of change symbolically as “the European Union” making demands for changes in the education system. These changes, it was believed, would provide a counterpoint to the political system where State Clientelism exists. The German case talks about intertwined or conflicting tendencies between internationalization and indigenous tendencies. Internationalization in Germany to make its schools comparability to others in the EU was reported as important.

While the European Union stood in the narratives as a convenient fiction by which system actors could justify local practices, there is also an author to these fictions. As Nóvoa has argued (2001), although there is an official principle of subsidiarity as it relates to education in the European Union and a language of harmonization of rules and regulation is not politically allowed, changes are in fact being harmonized through regulatory ideas that serve the same function, words that reorientate and edit past and future actions in the school such as the words “approximation”, knowledge-based policies, rolling agenda, development of quality education, promotion of mobility good practice that organizes sets of national policies.

*Categories of Exclusion: the ‘Traditional’ and the ‘New’ Within Current Modernizing Discourses Categories of Exclusion:*

One series of changes and continuity in governing are the categories that classify inclusion and exclusion. The interviewees interrelate older and newer categories of groups that are to be considered as excluded. The categories related to state targeting of those who have been excluded internally through the school certifying processes, and externally through the social and economic conditions that are viewed as producing exclusion.

The major social categories given as externally influencing inclusion and social exclusion in schooling seem not to have changed. Central for system actors are socio-economic status and poverty. But these “older” categories of differentiation, exclusion, and social equity weave together with categories of ethnicity, gender and race. We say “weave together” with categories of poverty and socio-economic status because many, but not all of the newer categories, are in fact correlated in the interviews, but never made explicit except by discussion about an ethnic or minority group in contexts of social problems of “lack of discipline”, unemployment, and family. This is not, however, necessarily the case with gender issues, which we can surmise moves along structural lines of division in society.

The importance of the new categories that overlap with that of poverty and socio-economic status is that the excluded groups become defined through new social categories of deviance. The different sets of categories are placed in a proximity to each other to pose a practical causality, that is, the different categories are thought of as providing explanations about the cause and effects of social inclusion and exclusion.

Respondents’ talk appears to be about external factors of exclusion/inclusion in schools. Breakdown of discipline producing behavioural problems and lack of common values and integration are seen as important elements in social exclusion. Icelandic actors express the belief that there is declining discipline and order in society that produces

social and cultural disorganization and the loss of tradition. The declining discipline is seen as preventing integration, solidarity and cultural reproduction. In Spain, school failure is viewed as bound to children with special needs who do not have basic [human] and Christian values (190). The Swedish respondents define the problem of exclusion as related to societal changes that have produced dissimilar children, a sense of dislocation in changes and youth have a negative image of society: changes not only structural but dispositional. Thus there is a need to reassert discipline of the child and the home is viewed as important for preventing dissolution and chaos.

In the ways that different categories of social inclusion and exclusion are narrated in the interviews we can begin to explore whose distinctions of social, external criteria are transported into the school as distinctions of difference and division. The categories of immigrant status and categories of [minorities] are discussed as questions of social deviance through categories relating to family status (single parent, teenage pregnancy) and educational attainment.

We can also consider that the external categories are themselves transported into the school to form and interrelate with the internal categories of the divide students. The excluded students, for example, are [transient students] who enrol for short periods of time, children with behaviour problems, and students described as being [at risk]. In some instances, the internal categories of deviance exist as invisible in the actors who are not mentioned, but whom everyone knows are being talked about. This is evident in the silence about immigrants in Finland and Iceland when discussing the need for discipline, tradition, and social harmony.

There is also a suggestion that curriculum discourses have intensified discussions about the problem of inclusion and exclusion through categories of difference, flexibility in curriculum multi-culturalism. However, the discourses of inclusion/exclusion are viewed as being unchanged in relation to the substance of discourse (see, for example, the Australian case).

The expansion of categories that differentiate the external social characteristics of the excluded student and the expansion of the categories of internal to the institutional ordering of the school have two ... One is that they embody images and narratives of deviance. We will return to this in the discussion of the individualization of pedagogy. Second, the kinds of people who are targets as socially excluded are produced through new sets of distinctions and differentiations that overlap external and internal categories and are practically related as governing principles in the educational discussions.

#### *Resource and Law Steering as Posteriori Governing:*

There are at least three changes in the institutional steering or governing of the organization and procedures of the schools systems that appeared in the interviews. One is resource steering. The second relates to changes in the laws regulating schools. The third is the decentralization and devolution of the school organization that is accompanied by new management practices of centralization. The latter we will discuss separately in the next section. These changes in fiscal management, laws and loci of decision making with the school system are thought to provide a more democratic and accountable school through improving the quality of education and by providing greater

opportunities for inclusion of parents and students. The resource and law steering was directed towards decentralizing the system and thus producing a stronger dispositional investment among parents toward the school and its values. As we will argue throughout: it should be so easy!

Changes in how resources are allocated and through which mechanism is one form of change in the governing of educational systems. Each of the countries, with minor variations, transferred fiscal management to local districts, with changes resulting in the workplace, curriculum and professional relations, contract management, and new self-evaluation.

Changes in governing were also produced through the promulgation of laws that were to modernize the system. The law entitled LOGSE in Spain increased compulsory education, related school more directly to the labour system and introduced measures to give attention to diversity: appreciation of more practical studies (verses Sweden with more theoretical studies), diversity of studies, curriculum adaption, value-affective as well as cognitive, inclusion of special needs student, flexible and heterogeneous group of pupils, vocational training. Greek educational law in 1997 focused on the democratization of the system through greater teacher and administrative autonomy and participation in school matters.

The new rules of governing can be thought of as a replacement of centre issues traditional form of control *a priori* based on normative prescription, to *a posteriori* local regulation and control modes related to school autonomy. This type of steering is related to the decentralization that has occurred throughout the countries in which municipalities and local regional governments have more control over how resources are allocated. In the German and Greek case studies, for example, respondents reported that there is greater decentralization and less central administrative steering that is accompanied, at least in the Greek case, with more state control and regulation.

#### *Cultural and Social Distinctions of Deviancy: Community and School Disjunction in Values*

There is a sense of causality in questions of dislocation and schooling in the political and system actor interviews. The narratives are about the need for discipline and order in society. This lack of discipline is translated by the interviewees into questions of family problems, the decline of rural communities (and values assumed to be related to an ideal of the rural as a moral code for upbringing), and the corrosive effects of media on youth. The task of schooling becomes one of re-socializing the child and family and thus the remediating of the child who is deviant.

The focus on the family and the community are expressed through discussing images of the dysfunctional family. In the reports where the respondents focus on explanations of social exclusion and failure of school, family background is signalled out as reinforcing the moral values and judgements that are lacking for educational success. We can begin to see in the interviews how social and economic characteristics of school failure are transported into discussions of family attributes that are viewed as causes of exclusion as opposed to systemic factors. In the Spanish report, for example, respondents define

the lack of school responsibility and see the failure of the child as residing in the family.

In the interviews, narratives of heroes, heroines and villains in the problem of social inclusion and exclusion are established. Finnish actors, for example, speak of the Head Teacher as a hero and the dysfunctional family as villain, with terms as the degenerated families and disturbed pupils marking the division between the normal and abnormal home context for success in schooling.

#### *Decentralization and Participation As Governing-At-A-Distance*

If we think historically about changes in governing patterns since World War Two, the purposes of decentralization were to increase citizen involvement and the development of civil society, and to counteract the effects of poverty on people's self esteem and efficacy. In some important ways, these themes underlie current reforms as the welfare states' risk management and patterns of governing have changed. The financial devolution and laws that give local municipalities and regions more flexibility in professional development and the school curriculum can be understood within this more general context, but with the current changes changing the relation of the state and the citizen dramatically through the decentralization occurring.

But we can also consider the actors' narratives as embedded in institutional practices related to discourses about social dislocation and disintegration, in which participation can function as a strategy to produce personal feelings of efficacy as well as a governing strategy related to increasing loyalty to the system itself as changes are being sought. If there is a feeling among school and political actors of a disjuncture between communities that are marginalized and the school values, decentralized processes provide one strategy in which to produce a greater harmonization. Cultural and social attributes of the deviant family and child were related to participation in the Swedish case. The Swedish teachers interviewed in the Scarce Swedish Schools (those with high percentages of immigrants) thought that parents were not engaged enough. In the schools with a high percentage of Swedish-speaking students, teachers perceive that parents are concerned with too much detail.

The decentralization of the governing of the school, as expressed in the narratives of the actors, has contradictory results. If we examine the reforms of Iceland, there is more civic participation as parents have moved into the formal field of power in school decision-making. But, in contrast, participation of parents in Germany has dropped when compared to the DDR when "everything was dutifully regulated". The Spanish report identifies parents in the private Spanish schools as interested only in academic achievement and see diversity as less important.

One approach to participation has been the creation of educational zones in which partnerships are sought. In Britain, educational zones involved partnerships among school, community, the State and business. The Portuguese PIET (territórios educativos de intervenção prioritária: Priority Intervention Educational Territories) were developed from the French ZEP (Zones D'éducation Prioritaire or Zones of Priority Education). In the 1980s and for the first time in Continental Europe, the French took a political action to promote regions with "pupils with problems" under the socialist government. The

French ZEP were to create a “contract” and “partnership”. The Portuguese socialists were influenced by the French experience and created TEIP zones in 1995 as one of their first political measures. These zones were to provide strategies in which the government “contract” expressed through a context of a “national pact” for education worked as a partnership with local areas. This model is embodied in the Portuguese PIET to give increased resources to schools and to develop the construction of local school networks. The purpose of PIET is to have greater articulation between schools and school levels to promote an experience exchange of valued teachers and local partners, but it also creates a pupil– school itinerary with PIET as minimum (base) standard for pupils.

#### *Assessment and Management As Governing Inclusion and Exclusion*

The intensified categories about social inclusion and exclusion are marked by and overlap with new discourses of governance through assessment and school management. In multiple countries, various system actors discuss the introduction of tighter assessment strategies in teaching, increased attention to measurement of children’s and teachers’ performance, and other accountability measures. The German and Spanish interview reports, for example, discuss the spread of assessments at both the system and teacher levels. The Swedish assessment systems is infused at all levels, from the development of school plans by the municipal council, to work plans in school based on the national curriculum and local priorities established as *benchmarks of necessary result*. National tests are given in years two, five and eight of schooling, with increased requirements including new criteria for grades. In the Finnish context there is increased talk about evaluation measures at the system level but this official narrative of assessment is virtual rather than real, as teachers report little actual use of accountability measures in daily practice.

But this anomaly in the Finnish context may not be as much of an anomaly as it may appear on the surface if we think of examining the problem of assessment and management as not only the concrete measures of performance in the classroom but of the circulation of particular rules to reason about problems of education, what we earlier discussed as “regulatory ideas” that reorientate and edit the past and the future actions. Discourses of quality control may function as such regulatory ideas in organizing teacher classroom practices. The new strategies of staff development programmes for teachers and school administrators are constructed through discourses of quality control through quality management. In Spain and Iceland, for example, the government offers new administrative courses, workshops, counselling and computer-based management for principals.

Quality control, as we have discussed in other documents, is a particular type of *governing-at-a-distance*. Individuals internalize the management rules of action and participation as though they are on their “down”. The logic of action demands particular types of self-assessment that steer what is construed as responsible and motivated teaching. In Portugal, for example, respondents discussed the issue of the quality of teaching that inscribes an entrepreneurial logic. Quality is checked through identifying the material conditions of teachers and the pupils’ development of competencies.

The changes in assessment and management procedures, however, have consequences other than increasing performance and outcome criteria. The Portuguese respondents suggest that the increased assessments are in conflict with those efforts for democratization. The new management procedures of assessment create more divisions of children's achievement and development within the school organization. The criteria of quality, the Portuguese respondents suggest, also tend to depreciate the work of teachers. The conflict between participation and assessment can be thought of as a conflict between the logic of modernization and the logic of democratization, tendencies which are at odds with each other.

*New Professional Strategies: Decentralization, Centralization and New Roles and Expertise of the Teacher*

As one should expect, the decentralization/centralization processes has produced new roles for system actors: increased responsibilities to coordinate school development and finances, reconstruct the school curriculum and new models of administration with a new middle management level within schools that include self management and self evaluation. In Sweden, for example, decentralization has produced new expertise in designing the teacher through hiring consultants, and need for economic skills in the local organization of the school.

The rise of a new expertise on teaching and management of teachers and schools, however, should not be surprising in light of the decentralization of resources. We can think of the new situation as being one where the local schools have money and the nature of the expertise outside the school has gravitated toward the local whereas in the past it has been central government that provided the institutional support for research, evaluation, and professional development.

While decentralization is discussed as reducing bureaucracy and increasing participation, there are also opposing tendencies in the changes. Bureaucracy and administration have moved to other sectors of the educational system to monitor the school through increased differentiation in management, and the involvement of local and national politicians.

*Teachers' Work: Autonomy as Increased Demands and Steering*

The decentralization and seemingly professional autonomy in the new management strategies have increased the demands and speed of work among teachers and school administrators. The interviewers report, for example, increased work demands and speed of tasks through the self-management strategies. The Australian and Finnish narrative of the life of teaching is one of an increasing workload and a more hectic pace. The Spanish case study, as well, reports that principals and teachers are saturated with tasks: to govern school and classroom, to work with the community, to make decisions, and to evaluate.

But at same time, it is reported in multiple cases that there is either a decrease or a maintenance of existing resources, and thus a reduced capacity to work with individual students. The German study identifies new educational missions of the teacher that include new secretarial work and political action. But larger class sizes, more

responsibilities that used to be those of parents, and also different behaviour problems are perceived by teachers. For the school and the teacher autonomy is to reduce bureaucracy, produce less hierarchy in traditional administrative structures, and produce independent resource management and the creation of a range of professional activities in reform laws.

The new teacher in the different countries can be summarized as having new responsibilities in a decentralized system with the focus on the individualization of the child. This involves pressure of time as flexibility produces new demands, freedom in management, increased conference and meetings, increased time in talking to others, time to talk to pupils, time for development. The teacher's expertise has to encompass the role of social worker, psychologist, leisure-time leader, guard, administrator, and pedagogy plays a smaller part than previously. The Swedish report defined the teacher as a *Fire Brigade Officer as well as an empathetic human*. The teacher, as the child in this individualization, is one who cares through an environment of cooperation and networking.

Many of the system actors believe that there is a levelling occurring. Swedish respondents, for example, talk about the levelling of pupils and special teaching in the core subjects. The regression to mean is related to the pressure to reach everybody and not let any child be left behind. In practice, this means that everybody must get their share and thus no material is to be too challenging. As with the curriculum discussed earlier, new hierarchies are produced. The new cultural and social organization of teaching has produced a new hierarchy in levels of decision-making as the control of teachers' time has increased.

#### *Narratives of Individualization and The Overlapping of External and Internal Categories of School Failure and Exclusion*

Within the changing categories of exclusion, the decentralization/centralization practices of assessment and management, and the new expertise of the teacher overlap with new strategies of individualization in the school. There is a reported shift from the social situation as a pedagogical focus to the knowledge that a pupil has. This individualization is thought to provide strategies for providing greater success and thus inclusion for children.

But the individualization of pedagogical practices embodies a continuum of values through which individual success and failure are classified. In the various cases, the classifications that are deployed by the system actors function to normalize what is "good", "bad", success and failure. The norms and values about success or failure is, though, more than is what is traditionally discussed about the devices of testing and measurement that assign children's achievement to grades. The normalization can be viewed as the inscription of the characteristics and capabilities of the child.

The normalizations are carried in the narratives and images of the "good" child that actors describe. The child is classified as one who is self-reliant, flexible, responsible for his/her own learning and personal performance, and for lifelong learning. In Germany, the successful child is described as creative, willing to take responsibility,

diligent, interested and curious, although there are different meanings and divisions of these characteristics when compared across east and west Germany.

Individualization goes with the ethos of caring and social responsibility that is also discussed in relation to the “good” child. Finnish actors talk about the caring teacher. This is a teacher who is extroverted, who participates in different pedagogic experiments, and knows how to express his/herself with parents and publicly. At the same time, the teacher is disciplined through actively following the time schedules.

The “good” self-reliant child is narrated with a discourse of collaboration and participation. The Greek case, for example, emphasizes the construction of the moral character of individual students developed in a climate of cooperation in school. But the Greek respondents make a distinction between the primary school that pays attention to the personality of the child and the secondary school that keeps the traditional role of teaching school subjects.

The emphasis on collaboration, networks, and participation of the new teacher and child can be understood in relation to the management and institutional changes. The new pedagogical roles and expertise of the teacher give support and help to sustain the biographical characteristics in which the management patterns of the centralized and decentralized organization of schooling work.

Not all of the cases, however, emphasize the collaborative, participatory and active child. The Spanish respondents speak of the pedagogical capabilities as different from those individualized dispositions discussed above. If we call the above descriptions of the child and teaching as lifelong learners and of a progressive pedagogy, then the Spain system actors focus, in contrast, on the child is disciplined through being respectful, solitary, and docile. This notion of docility, however, involves also notions of collaboration. The child who is not successful is one who is unmotivated, aggressive, undisciplined, uncritical and sometimes cruel to others.

The individualizing characteristics of the “good” student provide a way to think about the production of dividing strategies related to social inclusion and exclusion. Alongside the individual characteristics of the active child are other social values that give specificity to school success. Norms of culture, language and [commitment] through which notions of collaboration and participation are worked are also present in the system actor interviews. The Finnish actors, for example, establish a performative set of classifications of the active child who is also proficient in learning the Finnish language and adapting to and becoming committed to Finnish culture. The child in multiple cases embodies an emphasis on traditional virtues of diligence, punctuality, regularity, trustworthiness, and good behaviour. At same time, the excluded child is one who is differentiated as the immigrant whose cultural dispositions are invalid when spoken about (but rarely identified as such). The child who lacks the particular sets of dispositions and sensitivities is the child who is [at risk] as the social and cultural categories are made into technical distinctions of school management and remediation.

An increased specialization and individualization of the curriculum and a broadening and shallowing of the curriculum, with new alternative programmes is reported. In Australia and Portugal, for example, Alternative Curricula have been constructed. The alternatives are for children with inborn or social acquired attributes who cannot follow

normal school. The specific groups of children are described as at-risk of exclusion. Spanish curriculum changes have moved to more diversity: integration of pupils with special needs, increasing compulsory education to the age of sixteen and making it more flexible, new vocational training, heterogeneous rather than homogeneous grouping to accommodate diversity, and coordination with the whole community. Yet the flexibility and diversity in the new governing practices also produce new divisions and segregation in school. In Sweden, teachers see the school moving toward a theoretical approach that is seen as unrealistic with immigrant parents.

The divisions exist in a context of increased self-managing of schools, and through the intensification of teachers' work and autonomy, and reduced public expenditures (Australia, and Finland; Germany, but not emphasized but there; also Greece).

At this point, certain sets of relations between governance, inclusion and exclusion can be explored in the practices of management and individualization. In Sweden, this relation is found in the shift from detailed management to goal management. The new curriculum and teaching approaches are to provide students who are more self-determining through the action that they initiate by themselves. At the same time, respondents report that the individualization makes the individual drop out from socially accepted communities and the position of fully authorized citizenship as a personal and subjective condition.

There are other changes that also occur as the new management systems of decentralization/centralization intersect with the individualization practices. Some of the actors reported provision of less time to concentrate on individual pupils because of the increased system demands related to individual teacher's accountability practices. Greek, teachers felt demoralized as the major task of teaching was related to assessment and accountability. Further, Swedish respondents report that the individual student plans that they write do not integrate teaching the child but are targeted to school subjects rather than different groups. At the same time, the assessment procedures increased differentiation of pupils and increased centralization through tests and grade criteria.

#### *Governing & Inclusion/Exclusion:*

The problem of the relation of governance and exclusion/inclusion can now be explored more fully through the changes discussed by the system actors. There are two types of exclusion in perceptions: the internal distinctions of the school such as those classified as drop-outs and academic failures; and the external distinctions described as the new social phenomena that contaminates school realities. As we argued earlier, the internal and external distinctions overlap in ordering and dividing the characteristics of the child who is excluded.

This poses a difficult issue in the changes occurring. That issue is that the actual strategies to govern inclusion/exclusion embody divisions and theories of deviance. For example, a number of the case studies suggest that the processes of decentralization, devolution of decision-making, and resources allocation have had an impact on teaching and curriculum. This impact is viewed as a differentiation that enables teachers to meet the diverse needs of students.

Yet, at the same time, actors perceive that the changes in management and individualization are increasing and intensifying divisions and hierarchies in the educational system. New hierarchies have been produced through the classification and division of children who are included and excluded. This is evident in the Australian, Finnish, German, and Greek cases through the introduction of choice. Choice in schools has certain positive elements, such as in Finland as increasing autonomy of schools, cooperation among teachers, discussion of basic values and tasks of school, the need to focus on the individual pupil, and widening the possibilities of parent and pupils to choose.

When we examine further the new organizational and pedagogical practices related to flexibility and decentralization, many actors report contradictory elements. The changes towards flexibility and diversity, while addressing certain quality issues of schooling have also increased the divisions and distinctions through which schools order hierarchical pathways in multi-tiered school systems. In Australia, actors at all levels view the external social-economic factors as most important in relation to social exclusion. But the practices of change in programmes and curriculum divides in the educational system through an academic and vocational split, intensified hierarchy among schools through creation of diversity of programmes, and the competition between schools between private and public for funding and students. Both Australian and Finnish actors suggest that the decentralization and individualization of pedagogical programmes reduces the reduce teachers' capacity to address student needs despite the stress on individualization.

Choice in schools has also been used by those most advantaged in society. Choice in Finland is accompanied with an individualization that has increased segregation. The choice of school is used by the upper social strata more than by the working class; also the upper levels are more critical and thus apt to choose schools outside the district.

Again, an ironic quality to the reforms that seek flexibility and individualization. A heterogeneity is imposed in replace of previous moves to homogenize the pedagogical system. Yet, heterogeneity is perceived as being the major obstacle to pedagogy work of teachers in Portugal, Spain, and Sweden.

Finally, the new categories of exclusion can expand the grouping of children defined as at-risk as part of a pragmatic response to the changes rather than as a substantive recognition of the social and political problems underlying social policy. One governing approach to issues of social exclusion is to provide special funding allocations for schools where there are children of "special needs". The new systems of financial redistribution thus provides extra resources for the excluded. But in at least one instance, respondents report how that category of "excluded" is expanded so that local schools can claim the extra financial resources. In Finland, financial control increases who is identified as excluded as the *rucksack money* is claimed for special education or students with learning disabilities so a school can get extra money.

Thus we can conclude that the system changes that are to provide governing solutions for problems of social exclusion produce and in some cases exacerbate trajectories related to social inclusion and exclusion.

### **3.9 Statistics and social inclusion/exclusion**

Statistical reports and statistical data can be regarded as a way to perspectivize education – conditions and processes as well as outcomes. By means of categories and relations between categories we illuminate what we consider as important. We communicate to others what is of interest for us and tell them what to look for. For example, if we present shares of GNP for educational purposes in different countries we also say that it is important to consider this when we compare national educational systems.

But statistics are more than ‘merely’ reports. Categories as tools can divide and label people and define what is normal and what is abnormal. There is a dynamic pattern here between people and their acting on one hand and the labelling of these people and their acting on the other hand. That is why, in a way, categories make up people. Numbers – such as in statistics – are technologies of government that make modern government possible and judgeable.

Therefore, there is a need to reflect on the uses of categories of social inclusion and exclusion as well as on the stories told by these uses. In this case we turn to national and international statistics. We use a pragmatic approach here – focusing on concepts and categories that are in use in education policy discourses.

Social inclusion and exclusion are concepts that are abstract, including different spheres in society – we might talk about poverty, suicides, diseases, and so forth.

What categories are then of interest? Here we turn to text analyses of policy documents (Lindblad and Popkewitz, 2000) as well as interviews with system actors, i.e. those who are or have been important actors in recent changes in education systems. Researchers in different national contexts identified a range of indicators and categories in use dealing with poverty, school problems and school failure as well as unemployment and being subject to social welfare measures. We find also crime, teenage pregnancy and drug abuse.

Based on information on integration and exclusion discourses Lisbeth Lundahl (1999) summarized such notions into the following set of aspects:

Content aspects of *accessibility*, integration/separation, participation and economic distribution

*Contexts/arenas* – education, the labour market, society (citizenship)

*Time* – i.e. a change perspective

*Categories* – class, gender, ethnicity, age, disability, place of living

The content aspect deals with the meaning of social inclusion/exclusion in terms of access, integration/segregation (as products of social inclusion/exclusion), inclusion/exclusion of participation in different practices, and inclusion/exclusion in relation to the distribution of economic values. Here we find a basis for the understanding of social integration and exclusion. Rough working definitions of concepts in use follow. (The crudeness of the definitions is a consequence of the pragmatic approach presented above.)

- Access deals with the openness and closeness in different spheres of a society and its institutions. Which share of a cohort gets, for instance, access to education at a certain level? How many are employed and so forth?
- Integration and separation deals with divisions inside these spheres (like streaming in education, gender specific segments in the labour market, first- and second-order citizens in society etc.
- Participation deals with processes and outcomes in different contexts. For instance rates of school truancy and schooldrop-out as well as successful completion of studies at a certain level, labour market inclusion and (non) participation in elections.
- Economic distribution is an aspect dealing with resource allocation in educational systems as well as income distribution and notions of poverty.

The context aspect deals with different spheres in society where inclusion/exclusion occurs, such as the educational system at different levels, the labour market, as well as society in general. Here, the concept of citizenship is of importance. Who got access to the society and who are considered as citizens? What divisions occur inside the society in terms of integration and segregation? Who are participating in elections, in organizations, and in the public discourses? And in what ways are economic values distributed in society and who get social welfare?

Time is an important term in public discourses on social inclusion/exclusion. With notions of time we can deal with sagas of progress and denials. Time is a way to give name to the meaning of political action as well as social development.

Table 3.5: An overview of statistical indicators used in discourses on education and social inclusion/exclusion.

	Accessibility	Integration – separation	Participation	Economic distribution
Education	Share of population who go to education at different levels (including pre-school and adult education) Schools free of charge / school fees	Comprehensiveness/ divisions in education at different levels Divisions of private/ public schools, choice between schools	Share of population who successfully complete education at different levels Exclusion rates (drop-outs, school leavers without complete education Truancy rates	Principles of resource allocation (even/un-even, need-related etc) between municipalities, schools and students
Labour market	Employment and unemployment rates	Labour market divisions	Who are included and excluded in the labour market	
Society/ Citizenship	Who get access to society and who are considered as citizens	Ethnic divisions Religious divisions Regional divisions Housing segregation	Participation in general elections Organization rates Literacy rates	Income distribution Poverty Share of population on social welfare

In table 3.5 a matrix based on content aspects and context aspects is presented. Some implications of social inclusion/exclusion in the cross-sections between aspects are mentioned as well.

Based on this matrix we ask the following questions:

A. What are the stories of denials and progress concerning access, integration and segregation, participation as well as economic distribution told in national and international statistics in the contexts of education, the labour market and society/citizenship? A major focus will be on the time period 1990–2000, but longer periods would be of value as well.

- What are the tendencies or patterns of change concerning access to education, the labour market, and society?
- What are the tendencies to integration and separation?
- What are the tendencies of participation?
- What are the changes or persistences in economic distribution?

How are the included and excluded individuals constructed in national and international statistics? When are you at risk of being excluded? And what makes you an included subject in statistical information? Are there any changes in the construction of the excluded – or those at risk of being excluded – during the period of education restructuring?

- What categories are used to define who gets access and who does not get access to education, and the labour market, as well as to citizenship rights?
- What categories are used to define integration and separation in education, the labour market and in society?
- What categories are used to define participation?
- What categories are used to define distribution of resources?

In what ways do statistical categorizations and reasoning about social inclusion and exclusion construct the excluded and the process of social exclusion?

- What categories are used to define social exclusion?
- What implications have the uses of categories for the processes of inclusion and exclusion in education, and the labour market, as well as in society at large?

Answers to these questions will be obtained in different contexts and different systems of education governance. This will give us opportunities to discuss the impact of education governance system on social inclusion and exclusion as shown in statistical information as well as the other way around.

### **National cases of education systems**

Some aspects in the construction of the educational systems: students mostly end compulsory education at the age of 16 years, but Portugal and Greece are on the lower side and Germany on the higher side of this ending age. The dimension of the education systems is presented by the fact that most students have started their education at six years of age (Finland and Spain break this rule) and mostly are enrolled in education at the age of 15 or 16, a year more in Finland and two years more in Sweden. We also find that youth in Finland and Sweden as a rule are enrolled in or have completed secondary education.

Table 3.6: Some characteristics of education in the EGSIE national cases.

	GDP per capita in US-dollar 1997	Educational expenditures as a percent of GDP	Ending age of compulsory education	Age range at which over 90% of the population is enrolled	Percent of young people neither enrolled in or having completed upper secondary education
Australia	21 202	5.6	15	6-16	22
Finland	23 314	6.3	16	7-17	10
Germany	25 470	5.7	18	6-17	-
Greece	11 438	4.9	14,5.	6-15	-
Iceland	27 292	5.7	16	6-15	-
Portugal	10 184	5.8	14	6-15	47
Spain	13 530	5,7.	16	4-15	32
Sweden	25 746	6,9.	16	6-18	8
UK	21 740	m	16	6-15	-

Source: *Education at a Glance*, 2000 edition.

Considering the education context the following can be stated in terms of numbers: First, that access to education is widespread. Education is compulsory up to 14.5 –18 years. We find also that participation is common, but varying between the national cases. Besides that the table says nothing about integration or separation inside the educational system. It says also something – but rather little – about the financial distribution of resources, besides that in the national cases there are differences in educational expenditures as well as GDP (Gross Domestic Product).

We find measures of GDP are considered as important to present as well as expenditures for educational purposes. The categories we have chosen tell the reader that financial aspects are of importance – the kinds of financial aspects that are measured in GDP – as well as the number of years in education. Little is said about the qualitative aspects of education. Furthermore, in the text around the table we inform the readers about the results of the comparisons we carried out within the current set of categories. We have used a specific kind of reasoning based on the information that current databases such as those given by the OECD invite us to in terms of comparisons and conceptions of what is outside normality.

### *Statistics and equity problems*

Educational statistics are a means to portray educational systems, their properties and inhabitants. From such information we not only learn about education properties such as costs, numbers of students per teacher or participation in education at different levels. We also learn about the people in education, how they are categorized as well as about the meaning of education in society.

### *Education*

Education is mostly constructed by means of costs and access to different levels of education in combination with some categories dealing with dropping out of the level or programme in focus. Especially the OECD statistics but also in national statistics outcomes of education are presented and analyzed. An idea here is to present comparisons of educational system effectiveness – then in relation to costs.

We find in these statistics two different stories of progress. The one – an older story – is about increasing access to education in combination with decreased lack of education. Here problematic stories are defined in terms of social class, gender, ethnicity as well as age. The newer story is about success to reach certain results as measured by tests or perhaps by use of certain resources, such as computers or the Internet.

The subjects are constructed as individuals inside or outside an education system in progress. A way to construct individuals that deviate are those who fail to reach certain standards or who are low-achieving students. Sometimes this is made by distinctions of students' social and cultural characteristics.

Social exclusion is in general terms defined in terms of access, drop-out, or failure by the students. Distinctive for social exclusion in the education world is failure to complete compulsory education. The education system is a system that disqualifies as well as qualifies.

### *The Labour Market*

Education and the labour market are combined in statistical information in the following way: the importance of having a certain level of education (mostly secondary education) is underlined by presenting correlations between lack of this education and unemployment. Thus, a certain level of education is presented as a measure for the individual to avoid unemployment – and social exclusion. The other way around, individually achieved education results are regarded as a prerequisite for access to the labour market. Thus, education is a system that qualifies or disqualifies the individual at the labour market. It is a task for the individual to be qualified by means of education.

### *Society and Citizenship*

Surprisingly little is presented about citizenship. National and international statistics focus on the governed and not on those who are assumed to govern the state as citizens.

### *Statistics and systems of reason*

Statistics are a material practice in that they circulate in fields of cultural practices to generate principles of action and participation. Although with contestation along the way, statistical categories and magnitudes as they are woven with other discourses form a systems of reason that governs, as we will argue in this paper, how problems to be acted on are constituted, ordering the objects and characteristics of the people to be acted on, the relations through which causes are established and problems remedied, and the pathway for the possibilities of change itself. Statistics, then, in this discussion are not about numbers instituted in political projects and whose biases are to be corrected by better statistical formulas or more correct applications.

Our focus is on statistics as a system of reason poses the problem of the relation of governance and inclusion/exclusion differently from that of those who wish to deal with the technical issues of the adequacy of the use of statistics or their validity and reliability.

But the problem in our research is not only how numbers order and discipline what is seen, thought about, and acted on. The formulation of statistical reports does not exist on an equal playing field. Principles are generated that make up kinds of people, to borrow a phrase from Hacking (1995), as individuals are transformed into calculable and governable groups. The “kinds of people” targeted in the statistical formulations have typically been drawn from theories of deviancy, with the groups and individuals designated by social planning for rescue or redemption in the name of progress. The categories and divisions in national and international statistical comparisons of education that are constructed to seek a more inclusive society, we will argue, contain their own irony of modern social planning.

Statistics is, we argue, central in this modern problematic. They are deployed to administer populations in the name of freedom and liberty. This administration occurs through the reasoning of probability, as social planning is able to “tame chance” by making objects of the world intelligible and calculable for policy.

Our argument about education statistics, then, is not about their “goodness/badness”, usefulness, or biases; nor is it to censure or condemn numbers or statistics in education. Our task of inquiry is different: to inquire about the system of reason in which statistical discourses circulate and form a relation between governing and social inclusion/exclusion; it is to make apparent how the duality of the knowledge of education. The rules used to widen inclusion are, at the same time, rules of normalcy and divisions whose implications are to simultaneously construct systems that exclude as they include.

To make the knowledge of policy and education as a problematic of study is to disturb ““that which forms that groundwork of the present, to make once more strange and to cause us to wonder how it came to appear so natural” (Rose, 1999, p. 58). To show the contingency of the arrangement that we live by is to show how thought has played a part in holding those arrangements together and to contest the strategies that govern human possibilities.

### *Reasoning through statistics*

Our argument is that numbers are not merely numbers but overlapping and parallel discourses that come together and give intelligibility and practicality to action. In this section, we will explore how numbers enable administrative planning through multiple and seemingly disparate and incommensurable phenomena into >things= that are made measurable and thus commensurable and comparable. This making of commensurable data is related to the taming of chance through probability theories. Further, these numbers do not circulate as single discourses of description but in cultural fields of production and reproduction, administration that are embodied in the ordering relations of the numbers. Statistical data are made in the hope of identifying the relations of categories through which immediate or future interventions can be achieved in the lives of individual human beings, but also that the changes in the conditions of people will also produce changes in the kind of people that they are [Hacking, 1995, p.351]. It is not an historical accident that the statistics is French for state political arithmetic, governing practices to link the state and subjects.

### Taming Chance as an Object of Social Administration

The importance of international comparisons through statistics is a post-World War Two phenomena. It is to construct a comparative source of data about the seemingly interaction of diversified societies; and a comparative statistics that has ‘translatability’ renders commensurable the diverse social arrangements and ways of living. The categories of international reports of educational performance are often mirrored in national examinations of educational progress and policies to modernize the educational system.<sup>4</sup>

Education at a glance, OECD Indicators (1998) is one such report that has importance to educational planners in Europe as they consider state policy related to education, and, although less obviously, in the U.SAs do other reports, Education at a glance, OECD Indicators (1998) describes a fairly standardized view through focusing on educational enrollment over different layers on the school system from primary to tertiary education. But when read closer, such reports of national and international statistics discursively link education to the economic welfare, social justice, democracy, and the well-being of the individual in a manner that is constitutive of educational progress at multiple layers. The statistics for a practical logic of causation through which the salient characteristics of the development and progressive nature of educational systems are constituted.<sup>5</sup> At the same time, the categories and orders of ordered and made commensurate for social administration. A bond of uniformity about which objects are counted and ordered is created. The magnitude of the numbers establish the relation between categories of policy - between enrollments at different levels, school leavers (dropouts), and social economic group participation in different levels of school attainment. Its ambition to increase the efficiency of educational systems by means of comparisons focuses on a number of indicators. By means of numerical comparisons what is in flux becomes stabilized, and made to seem only as technical problem enclosed within a domain of objectivity.

### Statistics as a Cultural Field of Practice

What is perceived as a tool to capture educational realities and to make distinctions between individuals and groups for a more equitable and just society, is an inscription that brings into a seamless plane different discourses of education, economy, poverty, and cultural practices. The numbers are presented as a way to make the case for combating global inequalities through examining national trajectories in education, and to establish the role of education as an engine for the necessity to change. The use of

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<sup>4</sup>Such indicators appear often as in U.S. national reports of progress in science and mathematics achievement (such as the TIMS studies) or as discussions of school subjects studies, rates of drop-outs, etc.

<sup>5</sup>We use the notion of practical logic to examine how the textual relations of the categories through which data are collected in the reports form a way in which relations, outcomes, and cause/effect relations are to be understood. This practical causation has little to do with statistical theories but with the grammar of the text. The construction of a practical logic and causation is discussed further later in this paper.

seemingly an economic term as poverty is inscribes political and cultural representations as it is linked to other terms, such as sustainable development and peace in the text. The categories overlap with ideas of childhood (young people), and the administration of the future as the present in making the nation more democratic and inclusive. One is to read the statistical data as connecting education to democratization as a calculable, administrative practice.

Textually, our studies illustrate, the statistics reporting is to bring the general statements of progress into a concrete proximity with those populations that are in need of administration, such as those where there is family divorce, youth crime, poverty, and social and cultural differentiations. A nexus of relations are established between these characteristics of the deviant family and youth with descriptors of teachers salaries, professional preparation, and social status. The magnitudes of difference are used to compare more and less developed regions, with education becoming the sign-post through which to establish a continuum of value that ties economics, culture, society, and education. Lundahl (1999) argues that statistical indicators in Swedish public discourses on education and social inclusion/exclusion tacitly relates accessibility, integration of population, participation as ways in which citizenry and democracy are to be evaluated.

One difference in the current statistical reports from previous ones is the finer distinctions of the populations excluded. The finer distinctions function to objectively separate and rank individuals by creating finer and finer differentiations of everyday behavior (Dreyfus & Rabinow, 1983).

#### Statistics as State Political Arithmetic: Governing Practices to Link the state and subjects

Statistics is a key modality for the production of knowledge necessary to govern. Foucault (1988) argues that governing has involve, at least since the 18th century, a constant correlation between an increasing individualization and the construction of a totality that enables a recognising of ourselves as a society, as a part of a social entity, as part of a nation state. When people spoke about the police, Foucault (1979) argues, they spoke about the specific techniques by which a government in the framework of the state was able to govern so that individuals would be productive 'citizens'. By the 19th century, statistics conceptualized human needs in instrumental and empirical terms for the functioning of the state. Its system of social classification was not only to classify, but in an institutional form to establish grounds for authority and legitimacy through the categories they set down as those categories seemed both natural and socially real (Verdery, 1993, p.37).

Part of this social classification in governing is the assigning people to a population. Applying a calculus of probability, populational thought constructs a new form of individuality. The individual is normalized in relation to statistical aggregates from which specific characteristics can be ascribed to the individual and according to which a life trajectory can be plotted and development monitored and supervised. Measurement of school achievement related to social and psychological attributes of the child and family provide groupings of populations that relate through the statistic tables the

>factors= of school success or failure. Populational reasoning normalized through the construction of averages.

Through this thinking about populational reasoning we arrive further into the problem of numbers as more than just a way to classify. Numbers inscribe a system that not only calculates and rationally orders groups of people. The system of ordering and classifying also normalizes, individualizes, and divides. Reasoning about children, families and communities as populational groups makes possible of particular kind of governing that places the characteristics of individuals within populational norms and their divisions.

### Statistics and the Making of a Practical Causality

Statistics embodies a practical set of cause and effect, causality, and correlation that orders the problems and solutions of social policy. The causality is not one of a formal logic but in the patterns of categories, distinctions, and magnitudes in the >textual relations= that forms the practical causality.

The practical causality is expressed textually through a certain commonality of categories that describe and interpret the performance of educational systems across national and international reports of educational statistics.<sup>6</sup> International reports of education statistics, for example, focus on the relation of input and output contexts of education (Lindblad, 1999). The input context assumes that resources to education will produce good things, such as combating illiteracy or social exclusion, or competent citizens.

The magnitude of relations between input and output statistical categories that order how the problem of exclusion is understood and acted on With great similarities among the nations, social structural and demographic numbers concerning social segregation of class, ethnicity, race, poverty, rural/urban, crime) are related to other populations groups of deviancy, such as children and families >at risk= and thus in need of special governmental targeted assistance to prevent their exclusion. The numbers of these two sets of categories about populations excluded are then placed in a proximity of those of educational systems. A practical relation of magnitudes is established in the statistical reporting between the excluded from the school and the individual who is poor, unemployed, suicidal, and a drug & alcohol abuser and educational performance indicators, such as a grade repeater, adrop-out, truant, illiterate, and bully (bullying).

In the national and international reports are changing categorization of the problem of inclusion and exclusion in the reporting of educational statistical reporting to changing governing practices of the organization of education. The shift is from a governance by rules that focused on an input approach (what social classes achieve and stay in the

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<sup>6</sup>This commonality is a recent phenomenon, produced as international and inter-state agencies work on common categories by which to compare nations. This commonality in statistical categories is not only one of globalization founded by, for example, efforts of the European Union to develop identity through educational projects (Nóvoa, 2000), but also of national political debates of which, in the case of this discussion, education has become a measure of modernization for domestic consumption.

educational system or the money spent on national educational systems) to governance of education as an output approach by goals and evaluation, implicating that the results of education are emphasized. This shift can be related to other changes in the organizational relations of centralized and decentralized governing practices of education (see, e.g. , Lindblad & Kallos, 1994; Popkewitz, 1996).

A major assumption of statistical reports is one of the equity problematic, that is, adequate data collection will enable policy to govern access and representation more efficiently. The quantities represented in the statistical categories are placed in relation to each other categories calculate as the governance of inclusion/exclusion and to produce legislative steering through fiscal policy, legislation, and bureaucratic practices. The rules of reason that travel across the surface of the reporting documents is that the proper social administration and coordination of quantities that express the categories will govern the relevant kinds of people and thus, inclusion can be obtained and exclusion eliminated.

The numbers in the equity problematic establish a field in which inclusion stands as distinct from that of exclusion; to enact the right policies would eliminate exclusion and create an equitable society. that inscription of kinds of people makes, normalizes, and divides people so as to separate the characteristics of normality from that which lies outside of the normal. To put it somewhat differently, all systems of inclusions are simultaneously those of exclusion. It is this albatross that numbers in social policy and research carry

#### ‘Making Up’ Kinds of People That Are Governed and Governable

Hacking (1995) argues that numbers entail a way of tabulating or summarizing individuals into forms of ‘profiles’ or ‘personal inventories’ that then become human kinds. The numbers are a digest of what matters in intimacy, but they acquire the abstraction of the sciences or impersonal management. [Hacking, 1995, p.354]. Two kinds of people that Hacking discusses as inscribed in the numbers of educational statistics is the teen-ager parent and the at-risk child or parent. Hacking enables us to think of the distinctions are not only of numbers but imbued with social meaning in their categorization that we can relate to our concern with the knowledge, governance and inclusion/exclusion.

The deployment of the categories of types of human kinds is a strategy of social administration. It captures a hope that the kinds of people and their behavior can enter into practical laws that allow for the social administration of the human kinds through, for example, using those laws to change present conditions of the teenage parent and the at-risk child, for example, and to predict what would ensue. The types of human kinds are ostensibly placed in reform practices to signify a humanitarian effort to provide resources to schools that have consistently failed in their social and ethical purposes. Thus we want the right classification and the correct sorting so the evils can be confronted through a course of action that will change them for the better and will prevent others from joining the ranks. [Hacking, 1995, p.360]. One can easily identify the sets of relations and practical causation in the statistical reports as one form of such practical laws: The principles of the numbers are to be known so we can interfere,

intervene, help, and improve. But the numbers also introduce divisions and inscriptions that normalize that are not the intent of policy makers or social research but are embodied in the system of reason as it classifies, differentiates and divides. Whether we like it or not, our systems of discourses embody divisions, norms and values of distinctions.

This leads us to consider that the ranking and dividing do not occur on an equal playing field. Discursive patterns generate principles that qualify and disqualify individuals for participation and action. The norms embedded in social, economic and school categories that construct kinds of people (achievement, or of the "self-esteem" of the child) function to disqualify certain children who do not "fit" the norms of the average that are made to seem universal but which are composed from a particular historical location and dispositions and tastes (Bourdieu, 1979/1984).

### *Biographies that Govern Inclusion and Exclusion*

The construction of kinds of people produces a biography for the individual. The individual is defined normatively in relation to statistical aggregates from which specific characteristics can be ascribed to that person and according to which his or her growth and development can be monitored and supervised. The biographies that make up kinds of people have implications for governing social inclusion/exclusion. Statistics entails a way of tabulating or summarizing individual into forms of 'profiles' or 'personal inventories' that then become summarized to form 'profiles' or 'personal inventories' of human kinds organized in institutional practices.<sup>7</sup> The proliferation of educational programmes related to human kinds in schools as well as the formulations of new specialities in schools (school psychologists, school social workers, differentiations in special educational teachers) are examples of how categorizations not 'make' individuality.

The systems of classification are a cultural practice that structures the field of possible action. In EGSIE research, there is strong evidence that the distinctions of national and international statistics are brought into and constitutive of how educational system, teachers, and political actors 'reason' about policy and the governance of innovation in which to confront problems of inclusion and exclusion. The statistical categories press the individual with a calculable identity through which experts act and the individual must face in constructing one's own participation and identity. It is in this context of governing, the increased statistical distinctions in international and national educational reports are significant in the construction of new biographies in the problem of social inclusion/exclusion, but in ways that not considered in the policy formulations.

### *Constructing the other*

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<sup>7</sup>As before, we are talking about a system of reason that circulates through educational practices and thus could also explore recent qualitative approaches to the measurement of individuals in >portfolio assessments.= These as do numbers provide personal inventories that makes individual=s capabilities as calculable and thus known so we can interfere, intervene, help, and improve.

The significance of the quantification into numbers is not that the numbers exist or that they are good or bad, but that the inscribed systems of reason normalized the child, the family, and the community. The governing of the reason of statistics manages through a double relationship. The comparisons in education to order the competition between nations, regions, and enterprises are also social facts that construct differentiations through the contributors to society - those to be included as productive member of society- and the non-productive members are divided (Lindblad, 2000). While the use of statistics is a way of construction human kinds to open possibilities for the further, it is also a way that individuality is re-described and people can come to experience themselves.

Our approach to thinking of statistics has been to consider the calculations of the excluded as overlapping with other discourses of economic, social, cultural fields to form the biographies of kinds of people - the low achievement, poverty, ethnicity, and so on that make the categories and numbers significant as governing practices. A final note about policy, governance, inclusion and exclusion. When we talk current discussion about the so-called 'shrinkage of the state' that has been the hallmark of neo-liberalism and of The Third Way politics as to find a new relation between social welfare policy and economic restructuring of the state. Yet such a focus is on a sociology of institutions and organization. But when we examine the systems of reason that we have discussed in relation to statistical reporting, there is no such shrinkage of governing, just mutations. There are increased and finer national and international distinctions and elaboration of policy statistics. Thus, we can reach a counterintuitive conclusion to the problem of governance. If we think of statistics as embodying the idea of social administration, there has been a dramatic increase in the governance through the making of finer distinctions of the kinds of people governed.

### **3.10 Education, youth and social inclusion/exclusion**

#### **Introduction**

A special work package was constructed to capture perspectives and experiences of adolescents educated in different contexts. We made a selection of four national cases where different local contexts were investigated in relation to the theoretical questions on narratives, construction of subjects, and education governance and social inclusion and exclusion were in focus. This study was co-ordinated by the University of Helsinki and is presented in appendix 6 as a text by Rinne, Kivirauma, Aro & Simola (2000). We use parts of their texts here.

The study was constructed in order inform us about the following issues: In what ways have changes in education governance been transmitted to the level of individual subjects in education? Do we find a relation between the societal climate and opinions concerning education? Thus, we ask: What are the students' different experiences of schooling? What are their conceptions of themselves as individuals and as members of certain groups and categories? How do their social and cultural positions effect their conceptions of themselves as participants in social life? What options do they see as open or closed in education, work and life? What are their views on issues of equality

and success as well on social changes, globalization and the future? Of special interest are differences in social and political contexts.

We focused on students about to leave compulsory education. Transition from school to work or to secondary or higher education has changed radically in the post-industrial society. Transitions have become more protracted, routes have increased in complexity and sequences of events have changed. These changing transitional experiences are reflected in the different ways in which sociologists have conceptualized the transition from school to work (cf. Hannan & Verquin 1998).

A selection of five national cases as a basis for studies was made. The national cases were classified on basis of the work of Esping-Andersen (1996; 1999) as follows:

*Social democratic:* Sweden and Finland are representatives of social-democratic<sup>8</sup> welfare-state regime. The social democratic model is characterized by universalistic social policy, the prevalence of insurance-type social benefits and a strong, tax-funded public-service sector. In short, social-democratic welfare states could be characterized as service-heavy, but also as strongly geared towards income re-distribution. They have gone to great pains to include the middle classes in the system, in order to reduce the risk of what is often called “welfare backlash” (see Korpi 1983, 193-194). The concept refers to the legitimacy of the welfare state: this could deteriorate if large groups of people only act as payers in the system, but do not receive social benefits themselves. Esping-Andersen (1990; 1999) identifies working-class mobilization, Protestantism (the absence of Catholicism) and the absence of absolutism as the main driving forces behind the development of social democratic-type welfare systems.

*Liberal:* Australia could be characterized as a prime example of Esping-Andersen’s liberal welfare state. Still, it resembles the social-democratic countries in many respects. The power of the political left and the trade unions has been formidable, and thus working-class mobilization has been high. These factors did not lead to universalistic social policy, however, as they did in the Nordic countries, but were rather channelled into a labour policy emphasising full employment. Castles (1989) calls this “Welfare by other means”: despite a strong political left, the welfare state remained comparatively weak. The preservation of full employment was pursued by means of industrial arbitration, protectionist trade policies and wage flexibility.

*Conservative:* Spain and Portugal are perhaps not quite at the core of any particular welfare-state regime, but they may well be placed on the conservative side because they have many more characteristics in common with the conservative welfare state regime than with the others (Esping-Andersen 1999). Sometimes, however, they are singled out as a fourth welfare-state model because of their rather low income level, rather high share of unemployment and rather vulnerable level of education. We will stick with Esping-Andersen’s three-fold typology here. Core features of these countries include a strong emphasis on the family as the central social unit, the heavy influence of the Catholic church, and a comparatively weak welfare state.

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<sup>3</sup>The notion of “Social democratic” does not refer here to the Social Democratic Party, but it is rather a general characterization of societal consensus widely accepted in those countries.

### Assumptions and hypotheses:

The assumptions summarized here have been drawn from the more general assumptions presented earlier. They represent some of the central questions and presumptions concerning the differences between the countries. Whether these assumptions were lent any support will be discussed in the conclusion.

- Perceived equality is higher in the social-democratic welfare states (Sweden and Finland) than in the other regimes.
- Girls perceive education as more egalitarian than boys do.
- There is more solidarity (backing for pupils in difficulties) in the Nordic countries, and the needs of gifted pupils are considered more important in the liberal regime.
- Girls have “softer” values than boys: they believe more in giving extra attention to pupils in difficulties.
- The idea of school choice is more popular in the countries with more experience of private schools and where the differences between the schools are greater.
- The youth in the liberal countries (Australia) are more competitive and consider ambitiousness more important than those in the conservative or social-democratic countries.
- The exclusion risk among youth is highest in the liberal regime, and lowest in the social-democratic countries.

### Data

Similar data sets were gathered approximately simultaneously in Australia, Finland, Portugal, Spain and Sweden during the months of January and February 2000. The final version of the questionnaire was formulated at the Department of Education in the University of Turku, and translated into each respective language (English, Portuguese, Spanish and Swedish). Essentially the same questionnaire was used in each country.<sup>9</sup>

The survey questionnaire consisted of 27 sets of questions, each set containing 1-16 questions. The data file totalled approximately 140 dependent variables and 15 background variables. The questions concerned, among other things, the young people's opinions on education in general and on the characteristics of the ideal pupil, on the one hand, and on the qualities needed in working life on the other. Opinions concerning internationalization and globalization, more specifically the EU (except in Australia), were also mapped, as were thoughts about work, politics and the family. The choices were made on theoretical grounds that have been made clear in the preceding chapters. The final data file had 3008 cases altogether (Finland 567, Sweden 413, Spain 788, Portugal 605 and Australia 635). The response ratio is estimated to around 80 percent of students in the current school classes. There were some differences in the way in which the national surveys were executed. Special education in the form of special schools was not included in the survey, which could be considered somewhat of a shortcoming.

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<sup>9</sup> With the exception of Australia to some extent, where the questionnaire had to be moulded to correspond with the exceptional cultural and geo-political circumstances.

Hence, we are dealing with a comparison of the opinions of “normal” or “typical” pupils.

Table 3.6. Data by background variables: Frequencies.

Variables	Categories	N
Country	Finland	567
	Sweden	413
	Spain	788
	Portugal	605
	Australia	635
Gender	Female	1530
	Male	1460
Total		3008

The data sets in question were statistically not quite representative of the countries: the data was collected from schools, in selected regions of each one. However, it is possible to assess how well the samples represent the populations “structurally”, i.e. to what extent the background variables of the given samples correspond to the distributions in the real world.

- The Australian data was collected in south-eastern and southern Australia. The State of New South Wales was represented by two schools, while three schools in both in Victoria and South Australia participated in the survey. One of the schools, the Kurnai KODE<sup>10</sup> College in Victoria, had a 50% representation of Aborigine pupils. Geographically, Australia is fairly well represented in the sample, although neither of the Australian Territories (Northern Territory and Capital Territory) nor Western Australia were included.

- The Finnish data was collected in five schools in the city of Turku, thus roughly representing the 9<sup>th</sup>- grade pupils of in the city. Turku is one of the major cities of Finland, located on the south-western coast. Because the sample was gathered in one city, it can hardly be claimed to be statistically representative of the whole country, but we could hypothesise that Turku does not differ significantly from the country’s other major cities. Differences in comparison to Eastern and Northern Finland may quite well be larger.

- The Portuguese survey was executed in seven schools, four of which are located in the capital region, Lisbon (Lisboa), and the remaining three in Portalegre (Portalegre), Almada (Setúbal) and Paços de Ferreira (Porto).<sup>11</sup> Of the districts, Lisboa and Almada are situated in the centre of the country on the Western coast, Porto can be found on the coast in the north-west, while Portalegre is located in the centre of the country next to the Spanish border.

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<sup>10</sup> KODE stands for “Koorie Open Door Education”. Koorie refers to an Aborigine, literally meaning “person” or “man”. KODE schools cater for the needs of the indigenous people.

<sup>11</sup> Municipalities listed first, districts in brackets.

- In Sweden the data was collected in regions representing three areas: urban advantaged, urban disadvantaged and rural disadvantaged.
- In Spain the survey was conducted in Andalucia and in the Canary Islands, with a total of 15 schools participating in the study. In the autonomous region of Andalucia, the locality of Granada was represented by three schools, while Area Maracena, Montefrio and Córdoba participated with one school each. Of the localities in the Canary Islands, Los Llanos and S/C de La Palma had three schools each participating in the survey, while S/A y Sauces, Tijarafe and Puntagorda were represented by one school each. Measured by both annual household expenditure and average income, Andalucia is somewhat poorer than the national average. The unemployment rate has also been higher there than elsewhere in the country, being as high as 29.5 percent in 1998. In addition, Andalucia's occupational structure differs somewhat from the national average, being somewhat more inclined towards agriculture than the rest of the country. The Canary Islands, on the other hand, are obviously characterized especially by the strong influence of tourism.

#### Conclusions:

What conclusions can we draw from the Youth study about the theoretical options in the Egsie project? We used two theoretical approaches. The first was based on the fact that we use language to define and construct our social world. This is evident when we consider the facts that educational systems are regulated by texts, such as public discourse, laws and curricula, and that work in schools is based on language and speech interaction. The second deals with the production of social integration and exclusion in relation to identities and resources. This is also consistent with sociological notions of the production of habitus. Youth research is a very important part of the latter theoretical approach; now we are not dealing with the "linguistic turn" or rhetoric, but with the experiences of these actors, so that we can understand the way this system works.

In relation to the theoretical assumptions presented earlier we come to the following empirical conclusions.

1. In the social-democratic welfare states (Sweden and Finland), educational equality as perceived by the youth does not seem to be higher than in the other regimes.
2. Girls perceive education to some extent as more egalitarian than boys do.
3. There is evidently more solidarity (backing for the pupils in difficulties) in the Nordic countries than in the other countries, and the needs of gifted pupils are considered more important in the liberal regime than in the others.
4. Girls have "softer" values than boys: they are more in support of giving extra attention to pupils in difficulties.
5. The idea of school choice is more popular in the countries with more experience of private schooling (Australia, followed by Spain and Portugal).

6. In the liberal regime (Australia), the youth are the most competitive and consider ambition more important than those in the conservative or social-democratic countries.
7. As far as the risk of exclusion is concerned, no clear trend is visible. On the one hand, the future prospects in general appear to be somewhat darker in Australia and Spain, but on the other hand, Australian youth have the brightest prospects concerning working life. All in all, the Nordic youth would appear to be on the lower end of the exclusion risk scale, but the situation in Sweden differs considerably from that in Finland, for the better.

The assumptions concerning equality in education received hardly any support. In this survey, Finland stands out as the most non-egalitarian country, as perceived by the pupils. Conversely, Spain appears the most egalitarian.<sup>12</sup> The finding is quite surprising on theoretical grounds, on the basis of Esping-Andersen's (1990) regime theory used in this article, and requires further investigation. Finland has traditionally been strongly committed to equality, measured by the strength of the welfare state and relatively small income differences. The creation of the comprehensive school in the 1970s and the abolishment of streaming by ability in primary education were both based on the "super-ideology" of egalitarianism.

There is a possible interpretation for the seeming discrepancy in the perception of educational equality. Inequality of educational opportunities has diminished to a greater degree in the Nordic countries than in countries of the conservative welfare model, but not to the extent promised in the state social-democratic welfare programme. Nor has it had quite as much impact on diminishing or abolishing social inequality among people as has been promised (cf. Kivinen & Rinne 1995; 1996; Erikson & Jonsson 1996). Nordic youth may have grown up more critical of meritocratic issues and discourses concerning egalitarianism, and lost faith in great promises. In addition and more convincingly, there are of course vast differences in the cultural factors, social climates and ways of life between the South European and Nordic countries. The very definitions of the two welfare regimes incorporate the diversity of the two different cultural histories in question. Traditional authority, patriarchy and the like are stronger in the Latin countries than in Northern Europe (eg. Inglehart 1997, 93-98).

The assumptions concerning the gender differences in educational equality appeared to be in the right direction, in the light of the analysis. The girls were stronger believers in equality, and more convinced than the boys that everyone has the chance to succeed in school. There also were differences between the genders in the issues concerning solidarity and the needs of gifted pupils. The boys appeared to take a somewhat "harder" stance on these issues, and vice versa: the girls had more empathy with the hardship-stricken pupils, whereas the boys put more weight on the needs of the gifted.

The social-democratic (Sweden and Finland) and the conservative (Spain and Portugal) regimes were internally quite homogenous in the questions of school choice and

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<sup>12</sup> Spain had the largest proportion of pupils responding affirmatively to "Everyone can succeed at school" and the smallest proportion of respondents agreeing to "Teachers treat pupils differently according to family background".

selectivity, and also on issues to do with ambition and competitiveness. While a larger proportion of the South Europeans considered ambition to be an important quality, compared to the youth from the North, the former were, in practice, less willing to compete with others. The Finns and the Swedes were clearly less enthusiastic about the possibility to choose which school to attend than their South European counterparts in Portugal and Spain. Compared to their European counterparts, the Australians were much more competitive and ambitious. Moreover, they showed more support of gifted pupils and paid less attention to the needs of those in difficulties than the European youth.

The youth in Australia were also clearly in support of both school choice and selectivity, more so than the respondents in any of the European countries. Support for selectivity in school policy was lowest in the Nordic countries. The Australian youth also appeared to be the most competitive and to consider ambition more important than those in the conservative and social-democratic countries.

The young people's opinions differed considerably in the five countries. These differences were not always what they might have been expected to be. The assumption concerning the greater exclusion of youth in the liberal regime was not clearly supported by the analysis. On some indicators, the youth in Australia appeared somewhat more excluded than those elsewhere, but compared to the other countries, their work prospects seemed good. Economic developments in Australia have recently been quite positive: prospects of finding work are good, as unemployment is going down and the GDP is going up.<sup>13</sup> As a matter of fact, these young people had the most positive expectations of working life, under ten percent having doubts about their chances of finding employment.

There were also many remarkable differences among the welfare models - between Sweden and Finland, for example. In particular, there was considerably less solidarity expressed among the Finnish youth. This could, as a matter of fact, be thought of as the key to the differences between the countries. Most of these differences grow from the long differentiating historical and cultural roots, and Finland's quite short history as an independent state compared with Sweden. The economic recession of the 1990s was also steeper in Finland than it was in Sweden, partly due to Finland's greater dependency on trade with the Soviet Union. As a consequence, unemployment rose much higher in Finland, ending up in the middle of the 1990s as the second highest rate in Europe, second only to Spain.

There were also considerable differences between the Finnish and the Swedish youth concerning the "risk of exclusion": the Finns were clearly less certain of their future, and more worried about their chances in working life than their contemporaries in Sweden. The unemployment problem was handled differently in the two countries. It could be argued that the unemployed were practically sacrificed in Finland for the "greater good" of fixing up the economy. This was important for the political leadership, in order to meet the convergence criteria for the European Monetary Union, the EMU. Finland has also been quite "successful" in cutting down welfare costs (see

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<sup>13</sup> Australian Bureau of Statistics, <<http://www.abs.gov.au/>>, Key National Indicators.

Stephens 1996, 53-54), thus possibly adding to the feeling of insecurity among the population. Following recovery from the economic depression, social attitudes towards the marginalized have been hardening. Arguably, a division into “A– and B–citizens” has already taken place. Despite the lower rate of unemployment, there are still a lot of long-term unemployed people, who have all the fewer opportunities to find work. Despite the currently favourable economic trend in Finland, the demand for work force tends to concentrate in very specific fields of expertise, such as information technology.

The differences between Spain and Portugal, despite their similar socio-cultural backgrounds, are also interesting. Both are predominantly Catholic, have experienced a similar period of right-wing authoritarianism, and have adopted not dissimilar systems of social welfare and education. Opinions about exclusion were particularly diverse. One explanation is that Portugal has witnessed steady economic growth since the middle of the 1980s, and unemployment rates declined during the latter half of the 1990s (EC 1999, 139). These factors help to explain the lower “exclusion rates”<sup>14</sup> in Portugal than in Spain.

The picture conveyed in this article about the connections between liberal educational and social policies and the attitudes possessed by the youth of different countries and welfare regimes was painted from the “evidence” available. It shows quite clearly the differences that seem to spring mostly from the country of origin – more than gender or education and parental occupation. This indicates that the country as well as the welfare regime counts, but not as neatly as may be theoretically supposed. The argument for the power of the welfare regime as the explanatory factor could be most clearly based on the deviance of the Australian youth in questions concerning school choice, ambition, and solidarity.

### **3.11 Notions on governance**

Governance through management, laws and resource steering:

At first glance, the relation of governance to social inclusion and exclusion seems obvious, almost natural. Policy assumes that the central task of government is to identify a problem, to discuss possible paths toward solutions, and then to provide the means by which the problems can be solved. Governance, within this way of reasoning, is straightforward and directed by the idea of the State (or some surrogate social entity) that has the rationality to identify the problem and to plan and evaluation the outcomes of policy.

In this study, the problem of governance involved identifying the means by which activities are controlled or directed to deliver an acceptable range of outcomes for achieving greater social inclusion. Governance relates to particular categories that are targeted in the policy and actor interviews. The strategies focus on (1) economic inclusion, in which education is related to labour markets, with issues of class and social stratification highlighted; (2) cultural inclusion, in which access issues are broadened to

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<sup>14</sup> More specifically, we are dealing with opinions concerning exclusion.

include cultural representations of gender, race, ethnicity and religious minorities; and (3) inclusion of the disabled.

From this perspective, we can identify certain strategies of organizational, legal, and institutional change.

I. Resource and Law Steering as *Posteriori* Governing:

A. Two elements of steering or governing the schools systems are resource steering and law regulation. Resource steering has involved the transfer of fiscal management to local districts, with changes resulting in the workplace, curriculum and professional relations, contract management, and new self-evaluation.

B. There has been also the promulgation of laws to modernize the system and at the same time to address problems of social exclusion. These laws have, for example, increased compulsory education, related school more directly to the labour system through revising the curriculum and new programmes of vocational education, the introduced measures to give attention to diversity, inclusion of special needs student, and plans for flexible and heterogeneous group of pupils. Also important in this law governing are efforts to introduce more explicit programmes for character: moral and civic education to address perceived needs of cultural dislocation and disintegration.

C. Laws and administrative changes have also partially enabled the privatization of school. In some cases, the governmental support is not new, but what is new is the increases in such schools as well as the calls for marketization of schooling to enable children of the poor and marginalized communities to have choice of educational suppliers.

D. These changes can be thought of as a replacement of centre issues: traditional form of control *a priori* based on normative prescription to *a posteriori* local regulation and control modes related to school autonomy. This type of steering is related to the decentralization that has occurred throughout the countries in which municipalities and local regional governments have more control over how resources are allocated.

II. Decentralization

A. The new laws and fiscal changes in governance relate to the decentralization that has occurred in all of the systems in this study. The overt policy concern is to increase citizen involvement and the development of civil society as well as to introduce more efficient resource management. Decentralization involved, as suggested above, financial devolution and laws that gave local municipalities and regions more flexibility in professional development and the school curriculum. But is also an institutional strategy to produce personal feelings of efficacy through participation and a governing strategy related to increasing loyalty to the system itself as changes are being sought.

B. One approach to participation has been the creation of educational zones that involve partnerships among school, community, the State and business. In some

instances, the decentralization involves the identification of regions with “pupils with problems.”

### III. Centralization/Decentralization

A. There are new discourses of governance through assessment and management. This entails tighter assessment strategies in teaching, increased attention to measurement of children’s and teacher performance, and other accountability measures.

B. Governing occurs through assessment systems that entail the development of school plans by municipal council, work plans in school based on a national curriculum and local priorities, guided by national objectives to establish benchmarks of *necessary result*.

C. There is a shift from detailed management to goal management.

### IV. The New Management Strategies of the Teacher:

A. The decentralization and seemingly professional autonomy in the new management strategies have increased the demands and speed of work among teachers and school administrators. The new cultural and social organization of teaching has also produced a new hierarchy in levels of decision-making as the control of teachers’ time has increased.

B. But at same time, it is reported in multiple cases that there is either a decrease or a maintenance of existing resources, and thus a reduced capacity to work with individual students. The new teacher in the different countries can be summarized as one who is a social worker, psychologist, leisure-time leader, guard, administrator, in which pedagogy plays a smaller part than previously.

### V. Some Consequences of Changes in Governing Through Management Policies and Law

A. The assessment and management procedures governing educational system have certain consequences other than increasing performance and outcome criteria. The increased assessment produces conflict with efforts for democratization through creating more divisions within the organization of children in school. Further, there is evidence that criteria of quality tend to depreciate the work of teachers. The conflict between involvement and rules for assessment is referred to as being one between the logic of modernization and the logic of democratization, tendencies which are at odds with each other.

B. The new governing practices of decentralization/centralization processes have produced new roles for system actors: increased responsibilities to coordinate school development and finances, reconstruct the school curriculum, develop new models of administration with new middle management level within schools that include self management and self evaluation. It has also introduced new expertise in designing the teacher through hiring consultants, and the need for economic skills in the local organization of the school. There is also an increased bureaucracy and administration to monitor the school through

increased differentiation in management and the involvement of local and national politicians.

**Governance through systems of reason: distinctions, ordering and divisions of the characteristics of the good/successful and the poor/failing student and family:**

- VI. Governance occurs through the discourses of policy that circulate among different layers of educational and political systems to order, differentiate and divide the characteristics and capabilities of participation and non-participation.
- VII. If we look at the categories governing the principles in which inclusion/exclusion are discussed, the major social or categories of external factors influencing inclusion in schools have seemed to remain the same. These are those that classify individuals and groups by socio-economic status and poverty. But the categories of differentiation of marginalization and exclusion have shifted to include ethnicity, gender and race, including more detailed categories about family and delinquency to identify and target educational programmes, such as single-parent families and teenage pregnancy. At the same time, internal categories of schooling have changed to govern the programmes for inclusion, focusing on “transient students” who enrol for short periods of time, children with behaviour problems, and students described as being “at risk” .
- VIII. The relation of governing through strategies of centralization/decentralization also involves new governing discourses of assessment and management typically called *quality control*. Quality control, as we have discussed, is a particular type of governing that we have called *governing-at-a-distance*. the demands that teachers order their action through particular types of self-assessment that steer the responsibility of teaching through teachers’ own evaluation of their work. The quality of teaching embodies an entrepreneurial logic.
- IX. There is another forum of governing through the categories and distinctions of policy and system knowledge. That is through the normalization and dividing practices through which principles of inclusion and exclusion are formed. The focus on the family, culture and nation provides one such example of such governing. In the interviews and policy states the focus is on community and school disjunction in the values of particular groups of students. There is a continual feeling of the need for discipline and order that is translated into questions of family problems and the decline of rural communities (and values assumed related to ideal of the rural). The discourses embody principles that assume that the problem of the school is to resocialize the child and family that are perceived as deviant. The focus on the family and the community involves norms of the dysfunctional family that the school is to remedy: the family background that is singled out as reinforcing the moral values and judgements that are lacking for educational success.
  - A. This remediation involves an individualization. A shift is reported of the principles governing teachers’ actions from the social situation as a pedagogical focus to the knowledge that each pupil has (individualization).

- B. The individualization of pedagogical practices is a governing practice that establishes a continuum of values through which individual success and failure are to be determined. The inscription of value normalizes the characteristics and capabilities that are viewed as normal and reasonable dispositions and sensitivities for the child. We described these characteristics as “entrepreneurial.” The narratives and images of the “good” child is one who is self-reliant, flexible, responsible for his/her own learning, and personal performance, and life-long learning. Individualization goes with the ethos of caring and social responsibility, collaboration and participation.
- C. The individualization in multiple cases embodied an emphasis on the traditional virtues of diligence, punctuality, regularity, trustworthiness, good behaviour, and, at same time, the pupil at risk is also introduced into school-level discourse and that child is the immigrant whose cultural dispositions are invalid when spoken about (but rarely identified).
- X. The characteristics of the “good” student provide a way to think about how the new pedagogies of individualizing the curriculum are also dividing strategies related to social inclusion and exclusion. Alongside the characteristics of the child are other values and norms of success. (The individualistic elements of the “good” child stand in opposition to the individualistic or family attributes that are viewed as causes of exclusion, as opposed to systemic factors).
- XI. At this point, we can begin to establish relations between earlier discussions of formal governance practices and the discourses of management and individualization. There is a particular normalization that governs social inclusion and exclusion. The new curriculum and teaching approaches are to provide students who are more self-determining through the action that they initiate by themselves. At the same time, respondents report that individualization makes the individual drop out from socially accepted communities and positions of fully authorized citizenship as a personal and subjective condition to give up.
- XII. The individualization and management changes of decentralization, when combined with other changes, produces a regression toward the mean that is expressed as a levelling of pupils and special teaching. At the same time, the assessment procedures increase differentiation of pupils and increase centralization through tests and grade criteria.

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#### **4 Conclusions and discussion of policy implications**

This study can be used to rethink the way in which we understand the politics of schooling and thus the problematic of research as it relates to policy. Our method of research has been not to measure educational systems in relation to a normative principle of 'the good' that dominates contemporary policy studies, such as whether the educational systems are more or less inclusive. We have not pursued this approach for a number of major intellectual and policy related assumptions that historically cannot be sustained in social science research.

One is that the full range of social, cultural, and political variables can be assessed, controlled, and measured in order to provide a rational plan for achieving the expressed goals of the educational system. Yet while research continues with this tacit assumption, its ironies are to continually point to the complexities of social systems that limit if not prevents such a knowledge of the totality in which planning is to procedure.

Second, if we think of the hallmark of political decision-making is that is depends on assessments of multiple and contingent interests and decisions that prescriptive and instrumental research is unable to satisfy.

Third, such research fails because research is always of the past. Its understandings of the present are through what has been and not what is or will be. The philosophy of science has long made the distinction between social and natural phenomena. This discussion can be expressed as the difference between atoms that do not know they are being talked about when called atoms and thus unaffected by language and meanings, and people where the categories and distinctions of social science, once made, become part of and influence the world in which we live. In a difference sense, for ideas to be useful, they need to be adequately conceptualized in order to consider their implications and consequences to the practices of policy. But this is not one that provide schemes for direct intervention but schemas that enable a public dialogue in which to think about possibilities.

As a result, our approach to policy implications is one that diagnostic in order to consider the relations between governance and social inclusion and exclusion. Rather than seeking to be prescriptive or didactic, our approach is to focus on the assumptions, implications and consequences of those relations as they are expressed in the educational restructuring and reform constituted across the spaces of the European Union. In this sense, our research intervention in policy is to explore the rules that organizes policy so that those rules can be open for discussion about their possibilities and other alternatives.

1. *Reason as a Cultural Practice of Policy:* Policy needs to consider the significance of systems of reason that orders and classifies who is included and the excluded as a practice of governing. As we have argued, the principles that order the ‘problem-solving’ of policy and actors are not neutral but constructive and productive of educational practice. They should not be taken-for-granted.
2. *Two Different Politics in Policy:* Policy recommendations need to take into account two different elements of the politics of schooling. There is a politics related to who is represented and have access among different populational groups in a society and across the European Union space. But the politics of policy cannot only be concerned with whom benefits from organizational or pedagogical changes, but it needs to consider as well the principles generated to make the objects of schooling known, comprehensible and capable of action.
3. *Problematics of governing as both equity and of knowledge:* The ordering and dividing practices are not solely who is represented in school classrooms, such as who has higher achievement, or who goes on to college or who drops-out. While these are important indicators of equity, policy also needs to address the systems of reason in schooling as establishing a continuum of values that normalize certain types of dispositions and capacities that qualify and disqualify individuals for participation. In this sense, policy needs to consider the two problematics of governing: that of equity and of knowledge.
4. *Topoi in Policies:* Policies need to carefully examine the different *topoi*, that is, banalities that are universally accepted as truth about social policy and thus seem as unquestionable. While rhetoric strategies are important to any document, policy needs to consider where rhetoric becomes a *topoi* and obscures rather than clarifies the issues under consideration.
5. *Understanding the Complexity of Policy:* The new calculus of intervention and displacement are being placed in policy. The organizational changes that are to call forth a new democratization of the school are more than procedures and processes of some pure notion of democracy but are inscriptions that embody particular ways of classifying and dividing the world and its objects for action.
6. *The Policies Of Decentralization/Centralization:* The policies of decentralization, for example, need to be considered in relation to that of centralization in the configuring and redesigning of the relation of the State as the arena for securing the obligations to its citizens and decentralization that focuses on local involvement and *partnership* for participation through civil society. The governing patterns in these new relationships for increasing participation are not straightforward and needs careful scrutiny.

7. *Neoliberalism and its Downside*: While notions of market, individualization, and more efficient local management of educational systems seem to have a certain orthodoxy in reforms, policy makers should consider the downside of such reform, such as how new patterns of segregation and exclusion are produced.
8. *How Kinds of People Who are Vested as Objects of Policy*: It is through considering the knowledge systems of educational practices that policy makers can consider how particular kinds of people are vested with the capacities and capabilities for action and thus groups and individuals are qualified and disqualified for participation.
9. *Practical Causality In Policy and Creating Notions of Deviance*: It is important that policy makers consider the practical causality inscribed in current policy through its systems of reason. The categories deployed in policy ‘say’ that certain phenomenon should be viewed as going together and how certain people are to be given attention in planning for a more equitable society. But the practical relations among the categories do establish a causality based on notions of deviancy and ironically, not making it possible for groups to be considered as normal and included.
10. *Universals About Learning, Curriculum, Students and Cultural Divisions*: Much of the data in this study points to how the pedagogical content of teaching and curriculum is organized through policy that seems as universal set of rules - rules about the growth and development of childhood, rules about the cultural values and disciplines that children need to participate as a citizen in society, and the curriculum knowledge of school subjects that will produce the ‘knowledge society,’ among other universals. But policy makers should consider the rules of learning, pedagogy and curriculum are not universal rules about children and their development but particular historically mobilized divisions, norms, and displacements.

## **5 Dissemination of results**

Dissemination of the EGSIE research was carried out by means of three different sets of actions. The first action was to discuss our preliminary results and findings with “system actors” – that is education policy makers and education administrators. The second action was to inform “school actors” – headteachers, teachers, school nurses and so forth – about our research. And the third action was to inform other researchers about our work. The two first actions have so far been carried out in the different national contexts. We will present the dissemination over these contexts.

### **5.1 International symposia:**

In the EGSIE team we carried out three international symposia in relation to research association meetings:

EERA symposium:

Changing Education Governance and Issues of Social Integration and Exclusion: a study across Europe

AERA SYMPOSIUM (2000):

Educational Systems, Policy Discourses and Social Integration and Exclusion: A Comparative Analysis of The European Union

- *Chair: Sverker Lindblad*
- *Participants and Paper titles:*
- Ingófur Ásgeir Jóhannsson & Sigurjón Myrdal - *State Policy in Iceland, Governance and Inclusion/Exclusion*
- Sverker Lindblad and Lizbeth Lundahl- *Swedish Education for re- or deconstruction of “the strong society”*
- Miguel Pereyra, *The Discourse of School Failure And Social Exclusion in Spain.*
- Risto Rinne & Joel Kivirauma: *State Policy in Finland and Social Exclusion.*
- Sverker Lindblad & Thomas S. Popkewitz, *The Collection of International Data and the Fabrication of Identities in Schooling*
- Discussant/respondent: Miriam David, University of Keele,.

AERA symposium:

*Educational Systems, Policy Discourses, and Social Integration and Exclusion: A Comparative Analysis of European Union.* A symposium at the AERA annual meeting in Seattle, 10-15 April 2001.

Chair:

Sverker Lindblad, Uppsala University

Participants:

- *Iceland Educational Reforms and the Production of Social Exclusion . Sigurjon Myrdal, Dist Ed, University College of Ed*
- *Restructuring the Welfare State and the Organizing of Social Inclusion and Inclusion in Sweden. Sverker Lindblad, University of Uppsala; Lisbeth Lundahl, University of Umea*
- *Portugal School and Social Exclusion: From Promises to Uncertainties . Antonio Novoa, Universidade de Lisboa; Natalia Alves, Universidade de Lisboa; Rui Canario, Universidade de Lisboa*
- *Governance, Social Exclusion, and Comparative Studies of Policy . Sverker Lindblad, Uppsala University; Thomas Popkewitz, University of Wisconsin-Madison*
- *The Imposition of a Schooled Habitus: Australian Educational Governance and Social Exclusion. James Ladwig, University of Newcastle; Jennifer Gore, University of Newcastle*

Discussants:

Louis Miron, University of California at Irvine

Francisco Ramirez, Stanford University

## **5.2 Finland**

In Finland the main dissemination event was the annual meeting of the Finnish Education association. Here, system actors as well as school actors participated in a symposium concerning the EGSIE research. (reference: The EGSIE-seminar at the Annual Meeting of the Finnish Education Association, University of Turku, Nov 23.-25., 2000)

Texts produced by the Finnish Partners are as follows:

Kivirauma-Rinne 2000: Education and social exclusion in New Europe: Finland as a Model Pupil in the European Lesson of Educational Politics. In Guido Walraven, Carl Parsons, Dolf van Veen & Chris Day (Eds.): *Combating Social Exclusion Through Education*. Louvain - Apeldoorn: Garant & EERA, 29-50.

Kivirauma, Rinne & Seppänen, P. 2001: The Third Way in Finland. In Dave Hill (Ed.): *Education, Education, Education: Capitalism, Socialism and the Third Way*.

Simola, Rinne & Kivirauma (forthcoming) *Koulutuspolitiikkaa 1990-luvulla (The Finnish Education Policy during the 1990s)*. Tampere: Vastapaino

Rinne, R: National Changes in Education and Educational Governance. (1999) In S. Lindblad & T.S. Popkewitz (ed.) *Upsala Reports on Education* 34, 42-64. Upsala University.

Rinne, R: From Comprehensive School Citizen Towards Self-Selective Individual. (2000) In T. Popkewitz & S. Lindblad (ed.) *Upsala Reports in Education*. (yhdessä J. Kivirauman, P. Hirvenojan ja H. Simolan kanssa).

Rinne, R: Globalization of Education - Future Aspects of Nordic Education in the New EU Millennium. (2000) *Educational Review*.

Rinne, R: Changing Conditions and Governance of Educational Research in Finland (2000) *European Educational Researcher* 5, 3, 7-9.

Rinne, R: Education and Social Exclusion in New Europe (2000) In G. Walraven & C. Parsons (ed) *Combating Social Exclusion through Education*. Leuven-Apeldoorn: Garant, 29-50. (yhdessä J. Kivirauman kanssa)

Rinne, R: *Koulutuspolitiikan käänne ja nuorten syrjäytyminen 1990-luvun tilastojen valossa*. (manuscript)

Rinne, R: *New Ski Tracks with Old Staffs -Europeanization or Americanization of Finnish Educational Policy?* (with H. Simola & J. Kivirauma). (manuscript)

Rinne, R: *Neo-Liberal Education Policy Approaching the Finnish Shoreline* (2000) In D. Hill (ed) *Education, Education, Education*. England. (in press) (yhdessä J. Kivirauman kanssa)

Rinne, R: *Yhtenäiskoulu, koulutuspolitiikan käänne ja vanhempien näkökannat*. (2001) Teoksessa E. Olkinuora & E. Mattila (toim.) *Miten menee peruskoulussa?* (yhdessä A-K. Nuuteron kanssa) (painossa)

### 5.3 Germany

#### (A) Dissemination of the EGSIE work

##### *Conversations, discussions, adjustments*

- In context with the interviews follow up conversations with interview partners and their organizations focusing on the interview analysis text, submitted to all interview partners.
- National meeting (November 2000) with participants from schools, educational administration and educational research, according to the EGSIE proposal.
- Discussions and adjustments regarding the EGSIE project and its relation to other research projects with colleagues from Frankfurt University and with other colleagues from German universities; contacts and conversations with the German Youth Institute (Dr. Lüders) and with the Secretariat of the “Standing Conference of the Ministers of Education”, Bonn (Dr. Jonen).

##### *EGSIE results in the context of further teacher-training and university teaching:*

- 1999: *Schulentwicklung in Europa*. Lecture at the ““pedagogical conference” (Pädagogische Konferenz) with teachers from all school types in Passau (Bavaria).
- 2001: *Schulentwicklung und Chancengleichheit im europäischen Vergleich. Ein Bericht zum Forschungsprojekt der Europäischen Gemeinschaft ‘Education Governance and Social Integration and Exclusion’*. Lecture and chair of a half-day part seminar at the Fridtjof-Nansen-Akademie für politische Bildung, Ingelheim, Rhineland-Palatinate.
- 1998, 1999, 2000: seminars at the universities in Giessen and Frankfurt relating to topics of the EGSIE-project (education policy, equal opportunities, educational statistics, school development in Europe, methods of comparative and social research).

#### (B) Publications and conference participation based on EGSIE.

- Presentations and discussions in the context of conferences of the German association of educational research (Deutsche Gesellschaft für Erziehungswissenschaft), especially its commission “science research” (Kommission Wissenschaftsforschung). In this context: organization of a conference about “Evaluation of and within Education” at Frankfurt (1999) and contribution of a paper regarding “School Development in European Context”. The results of this conference will be published in 2001 in the “Deutsche Studien Verlag“ (Beltz), Weinheim.
- The department of education of the university of Frankfurt decided to organise and to finance an international conference on “Globalization and Social Justice as Educational Challenges. Relations between Politics, Economy and Education”, close to EGSIE-topics and their European context in autumn 2001.

##### *Conference Contributions:*

- 1998: “*Probleme der Schulentwicklung im europäischen Kontext*”, inaugural lecture, department of Education, university of Frankfurt
- 1999: *Evaluation, Schulentwicklung und Chancengleichheit im europäischen Kontext*. Presentation at the autumn conference of the commission “science research” (Wissenschaftsforschung) of the German association of educational research (Deutsche Gesellschaft für Erziehungswissenschaft)
- 2000: *International Perspectives on Teachers’ Work*. Chair of a panel at the annual conference of the European Educational Research Association (EERA) in Edinburgh
- 2001 (forthcoming): *Educational knowledge between science, policy and pedagogy in Germany*. Contribution to the conference of the Keele Education Policy Research Group (Travelling policy/local spaces: Globalization, Identities and Education Policy in Europe), Keele University (UK), Department of Education, June 2001.

### *Publications*

- 1999: The German Case. In: Lindblad, Sverker & Popkewitz, Thomas S. (Eds.): *Education Governance and Social Integration and Exclusion: National Cases of Educational Systems and Recent Reforms*. Uppsala 1999, pp. 65-85.
- 2000: Discourses on Education Governance and/or Social Exclusion and Inclusion in Political Parties in Germany. (jointly with Sandra Muskat, Rita Stolbinger, Kathrin Tietze). In: Lindblad, Sverker & Popkewitz, Thomas S. (Eds.): *Public discourses on education governance and social integration and exclusion: Analyses of policy texts in European contexts*. Uppsala 2000, pp. 55-79.

### *Forthcoming publications and research reports*

- 2001: *Education Governance and Social Integration and Exclusion: Transitions, Absorbing Systems and Risks of Exclusion. Education in Germany in the Mirror of Statistics and Empirical Research* (jointly with Regine Mohr and Manfred Kroschel).
- 2001: *Education Governance and Social Integration and Exclusion: Interviews with Teachers, School Heads and System Actors*.
- 2001: *Schulentwicklung und Chancengleichheit. Deutschland im europäischen Kontext* (working title), 2001. (Publication of the German findings of the EGSIE-project including the results of the national meeting in German language, possibly with publisher Beltz)
- 2001: *Evaluation (in) der Erziehungswissenschaft*. (Editor of a volume in the series “Beiträge zur Theorie und Geschichte der Erziehungswissenschaft”), Weinheim: Deutscher Studien Verlag (Beltz), 2001.
- 2001: *Wissenschaftstheorie und Wissenschaftspolitik in der Erziehungswissenschaft* (jointly edited with G. Pollak as a volume in the series “Beiträge zur Theorie und Geschichte der Erziehungswissenschaft”), Weinheim: Deutscher Studien Verlag (Beltz), 2001).

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## **5.4 Iceland:**

### **Lectures etc to system and school actors:**

- Sigurjón Mýrdal. 1999. *Teacher education/teacher development for small rural school teachers*. A key note address at the Memorial University of Newfoundland conference entitled *The sustainability of small rural schools across the North Atlantic Rim*, August 11-14, St Anthony, Newfoundland and Labrador.
- Sigurjón Mýrdal. 2000. *Faglegt sjálfstæði grunnskóla í nýju rekstrarumhverfi*. [Professional Independence in Primary Schools and New Context of Governance]. Address to a seminar for school principles held by the Reykjavík Educational Office, in Hótel Keflavík, 21. January 2000.
- Sigurjón Mýrdal. 2000. *Nýtt starfsumhverfi og breytt hlutverk í skólum*. [New Context of Governance and changin roles in public schools]. Lecture to principals meeting in the Reykjanes local education area. Sandgerði 21. February 2000.
- Sigurjón Mýrdal. 2000. *El profesorado ante la integración y la exclusión social en un país isla. [Teachers roles, Integration and Exclusion in a island society]. Lecture at a conference by the Ministry of Education in Canary Islands, í Santa Cruz de La Palma 3. April 2000*
- Sigurjón Mýrdal. 2000. *Pedagogisk ledelse og lærerens utvikling*. [Educational Governance and Teachers Development]. Lecture at annuala meeting of Nordic Local Education Authorities. Reykjavík 6. September 2000.
- Ingólfur Ásgeir Jóhannesson. 2000b. *Nemendur sem viðfangsefni greiningar á sérþörfum. Um fjölbjóðlega rannsókn á stýringu og blöndun í menntakerfum*. [Pupils as diagnosable subjects. On a multi-national study of governance and inclusion in educational systems.]. Presentation at the annual

congress of primary and early childhood teacher associations in North East Iceland, Dalvík, September 30. <http://www.ismennt.is/not/ingo/EGSIEDAL.HTM>  
Sigurjón Mýrdal and Guðrún Geirsdóttir. Nóvember 2000. Stjórnun skólans í dag. Erindi flutt á námsstefnu Skólafélags Íslands í Reykjanæsbæ.

## Reports and publications

- Sigurjón Mýrdal. 2000. *Concepts, Contexts and Contrasts; Reflections from the Field of Comparative Education*. Keynote Address at the Nordic International and Comparative Education Network (NICE) seminar: The importance and effect of context for education. Varmaland, Iceland 26. May 2000
- Guðrún Geirsdóttir; Gunnar E. Finnbogason; Ingólfur Ásgeir Jóhannesson; Ólafur J. Proppé; and Sigurjón Mýrdal. 2000. *Changes in Patterns of Educational Governance and Social Integration and Exclusion in Iceland in at the Beginning of a New Millennium. A project report* (edited by Ingólfur Ásgeir Jóhannesson)
- Guðrún Geirsdóttir. September, 2000. *Taking Sides: The New Role of the Principal in the Light of Recent Changes in Governance of Education in Iceland*. Paper at the annual meeting of European Educational Research Association. Edinburg.
- Gunnar E. Finnbogason. 2000. *The statistical and social status of children and youths in modern Icelandic society. Study report*. [Reykjavík, Kennaraháskóli Íslands.] [Uppkast, nóvember, verður birt í Uppsala Reports.]
- Ingólfur Ásgeir Jóhannesson. 2000a. *Discipline, governance and inclusion in education in Iceland in the late 1990s*. Community viability, rapid change and socio-ecological futures. Papers from the conference on societies in the Vestnorden area (eds. Jónas Gunnar Allansson og Ingi Rúnar Eðvarðsson), pp. 109-122. Akureyri: University of Akureyri and the Stefansson Arctic Institute <<http://www.ismennt.is/not/ingo/EGSIEVEN.HTM>>.
- Ingólfur Ásgeir Jóhannesson (ritstj.), Guðrún Geirsdóttir, Gunnar E. Finnbogason og Sigurjón Mýrdal. 2000. *Changes in patterns of educational governance and social integration/exclusion in Iceland at the beginning of a new millennium*. Project report. [Reykjavík, Kennaraháskóli Íslands.] [Uppkast, desember, verður birt í Uppsala Reports.]
- Ingólfur Ásgeir Jóhannesson, Gunnar E. Finnbogason og Guðrún Geirsdóttir. 2000. *Curriculum, management and self-evaluation in Icelandic primary and secondary schools*. In *Public discourses on education governance and social integration and exclusion. Analyses of policy texts in European contexts* (eds. Sverker Lindblad and Thomas S. Popkewitz), pp. 95-117. Uppsala Reports on Education 36. Uppsala: Uppsala University.
- Ingólfur Ásgeir Jóhannesson and Sigurjón Mýrdal. 1999. *The case of Iceland-The first report of the Icelandic group*. In Sverker Lindblad and Thomas S. Popkewitz (eds.). *Educational governance and social integration and exclusion: National cases of educational systems and recent reforms*, pp. 129-142. Uppsala Reports on Education 34. Uppsala: Uppsala University.
- Sigurjón Mýrdal and Ingólfur Ásgeir Jóhannesson. 1999. *Governance and inclusion in Icelandic primary and secondary education: emerging issues and stories*. Presentation at the annual convention of the American Educational Research Association, Montréal, April 19-23. <<http://www.ismennt.is/not/ingo/EGSIEMON.HTM>>.
- Sigurjón Mýrdal, Ingólfur Ásgeir Jóhannesson, Guðrún Geirsdóttir and Gunnar E. Finnbogason. June, 2000. *Icelandic educators interviewed about governance and integration/exclusion. A brief report*. [Reykjavík: Kennaraháskóli Íslands; verður birt í Uppsala Reports.]
- Sigurjón Mýrdal and Jean Brown. September, 2000. *A Comparison of the Governance of Education Systems in Newfoundland and Labrador and Iceland*. Keynote Address at the North Atlantic Forum 2000. Corner Brooks, Newfoundland.

## 5.5 Portugal:

### Dissemination

One meeting with politicians, administrators, teachers and headteacher to present and discuss the project results.

Two meetings with students and post-graduate students of our faculty to present and to discuss the project and the results

One meeting with a research team of the Faculty in which we were are involved to present the project and discuss the methodology and the results.

### **List of international and national publications and conference participation**

Presentation of a paper at EERA Conference, Edimbourg 2000.

Presentation of a paper at AERA Conference, Seattle 2001.

Presentation of a paper at a Conference organized by the Secondary Teachers National Association, Sintra 2001.

Presentation of a paper at the Biennale de l'Education et de la Formation, Paris, 2000.

Nóvoa, A. Alves, N., Canário, Rui (2001). Escola e exclusão social: das promessas às incertezas. In *Análise Social* (in press)

Canário, R. Alves, N. e Rolo, C. (2001). Escola e exclusão social para uma análise crítica da política TEIP. Lisboa: EDUCA/IEE.

Canário, R. (2000). A escola face à exclusão social. In *Revista da Educação*, vol. IX, nº1, pp125-135.

Canário, R. Alves, N. e Rolo, C. (1999). Exclusão social e exclusão escolar: a criação dos territórios educativos de intervenção prioritária. In A Estrela e J. ferreira (orgs) *Educação e Política*. Lisboa: AFIRSE, pp. 163-171.

## **5.6 Spain**

### **A. Dissemination in Spain**

The dissemination actions in relation to system and school actors in Spain were based on seminars, where researchers from the EGSIE teams presented their work

*DEBATES organized to discussed with social actors the EGSIE project: The "Spanish Case"*

"La escuela y sus agentes ante la exclusión social", University of Granada, 27th-29th May 2000. Lecturers: Professors Juan Carlos González Faraco, Sverker Lindblad, Miguel A. Pereyra and Thomas S. Popkewitz.

"La escuela frente a la exclusión social", Comunidad Autónoma de Canarias. Consejería de Educación, Cabildo Insular y Universidad Nacional de Educación a Distancia (UNED), La Palma (Canary Islands), 4th April 2000. Lecturers: Professors Juan Carlos González Faraco, Sverker Lindblad, Sigurjón Myrdal, Miguel A. Pereyra and Thomas S. Popkewitz.

"Infancia y exclusión social" Summer course at the International University of Andalucía, La Rabida (Huelva), 29th August - 1st September 2000. Lecturers: Professors Juan Carlos González Faraco, Miguel A. Pereyra, and Thomas S. Popkewitz.

*Papers presented at conferences, meetings, and courses*

Research from EGSIE was also presented in a number of conferences, meetings and courses. Below follows a list of such dissemination actions.

CASTILLO, P. y COLÓN DEL PINO, M. (2000): "El proyecto EGSIE y el análisis de documentos: una herramienta para conocer la evolución del proceso de reforma educativa in España" in *X Jornadas LOGSE. La Escuela y sus agentes ante la exclusión social*. Granada, March 2000

CASTILLO, P. (2000): "La juventud de Andalucía y Canarias en los ámbitos de marginación social urbana" in *Jornadas sobre la escuela frente a la exclusión social*. UNED. Sta. Cruz de la Palma, April 2000

GONZÁLEZ FARACO, J.C. (2000): "El proceso de inclusión/exclusión escolar desde la perspectiva de los actores políticos. El caso español del proyecto EGSIE" in *X Jornadas LOGSE. La Escuela y sus*

*agentes ante la exclusión social*. Granada, March 2000

..... (2000): "Imaginando un nuevo ciudadano: la reforma educativa española en el discurso de los actores políticos del sistema escolar" in Curso de Verano in la Universidad Internacional Iberoamericana de la Rábida (Huelva), August 2000.

..... (2001): "Entre la equidad y la eficiencia: Una evaluación política de la reforma educativa española" in VIII Congreso Nacional de Teoría de la Educación. Huelva, March 2001.

JIMÉNEZ, M. (2000): "La juventud de Andalucía y Canarias en el ámbito rural". in *Jornadas sobre la escuela frente a la exclusión social*. UNED. Santa Cruz de la Palma, April 2000.

JIMÉNEZ, M. (2000): "La gobernación de la educación y la inclusión y exclusión social: un análisis a través de entrevistas con actores políticos y educativos". XIX Jornadas de Didáctica y Educación. Granada, December 2000.

JIMÉNEZ, M. y TORRES, M. (2000): "La escuela ante la exclusión social, la escuela ante el tiempo escolar" in *X Jornadas LOGSE. La Escuela y sus agentes ante la exclusión social*. Granada, March 2000.

JIMÉNEZ, M. y TORRES, M. (2000): "Perspectivas de los jóvenes españoles y fineses ante la Educación Superior" in VIII Congreso Nacional de Educación Comparada. Murcia, November 2000.

LUENGO, J. (2000): "De la compensación educativa a la inclusión escolar". *X Jornadas LOGSE. La Escuela y sus agentes ante la exclusión social*. Granada, March 2000.

..... (2001): Evaluación de la política educativa de inclusión en España en la década de los ochenta" VIII Congreso Nacional de Teoría de la Educación. Huelva, March 2001.

LUENGO, J. y LUZÓN, A. (2000): "La construcción de la infancia en el discurso de los docentes" Curso de Verano en la Universidad Internacional Iberoamericana de la Rábida (Huelva), August 2000.

LUZÓN, A. (2000): "La exclusión social como figura contemporánea emergente de la pobreza urbana" in *X Jornadas LOGSE. La Escuela y sus agentes ante la exclusión social*. Granada, March 2000.

TORRES, M. (2000): Expectativas profesionales y laborales de los jóvenes de Andalucía y Canarias" in *Jornadas sobre la escuela frente a la exclusión social*. UNED. Santa Cruz de la Palma, April 2000.

TORRES, M. (2000): "Narrativa de jóvenes andaluces y canarios ante la institución escolar" in Actas de las VI Congreso Interuniversitario de Organización de Instituciones educativas y de las V Jornadas Andaluzas sobre Organización y Dirección de Instituciones Educativas. Granada, December 2000.

TORRES, M. (2000): "Un instrumento de recogida de datos para el análisis de la inclusión y exclusión social con jóvenes europeos" Actas de las VI Congreso Interuniversitario de Organización de Instituciones educativas y de las V Jornadas Andaluzas sobre Organización y Dirección de Instituciones Educativas, December 2000.

SEVILLA, D. (2001): Políticas de educación infantil en España y su incidencia en los procesos de exclusión social. Curso de Verano en Universidad Internacional Iberoamericana de la Rábida (Huelva), August 2000.

## **B. PUBLICATIONS (only listed those already printed)**

CASTILLO, P. y COLÓN DEL PINO, M. (2000): "El proyecto EGSIE y el análisis de documentos: una herramienta para conocer la evolución del proceso de reforma educativa en España" in SEVILLA, D., LUENGO, J., Y LUZÓN, A. (comp.): *La Escuela y sus agentes ante la exclusión social*. SDG Publicaciones. Granada (España), 2000, pp. 43-48 (ISBN:84-699-3348-5)

GONZÁLEZ FARACO, J.C. (2001): "Entre la equidad y la eficiencia: Una evaluación política de la reforma educativa española" in *Políticas públicas actuales de educación*. Universidad de Huelva (ISBN: 84-95089-52-1)

JIMÉNEZ, M. Y TORRES, M. (2000): "La escuela ante la exclusión social, la escuela ante el tiempo escolar" in SEVILLA, D., LUENGO, J., Y LUZÓN, A. (comp.): *La Escuela y sus agentes ante la exclusión social*. SDG Publicaciones. Granada (España), 2000, pp. 71-77 (ISBN:84-699-3348-5)

LUENGO, J. (2000): "De la compensación educativa a la inclusión escolar" in SEVILLA, D., LUENGO, J., Y LUZÓN, A. (comp.): *La Escuela y sus agentes ante la exclusión social*. SDG Publicaciones. Granada (España), 2000, pp. 66-72. (ISBN:84-699-3348-5)

----- (2001): "Evaluación de la política educativa de inclusión en España en la década de los ochenta" in *Políticas públicas actuales de educación*. Universidad de Huelva (ISBN: 84-95089-52-1)

LUZÓN, A. (2000): "La exclusión social como figura contemporánea emergente de la pobreza urbana" in SEVILLA, D., LUENGO, J., Y LUZÓN, A. (comp.): *La Escuela y sus agentes ante la exclusión social*. SDG Publicaciones. Granada (España), 2000, pp. 55-66

Master thesis

TORRES, M. (2000): *El gobierno de la educación y la inclusión/exclusión social: el análisis del discurso de los actores a través de entrevistas*. Facultad de Ciencias de la Educación, University of Granada. Advisor: Profesor Miguel A. Pereyra

## **5.7 Sweden:**

### Dissemination

Dissemination of the EGSIE research in Sweden was carried out by means of three different sets of actions. The first action was to discuss our preliminary results and findings with “system” actors – that is education policy makers and education administrators. The second action was to inform school actors about our research. And the third action was to inform other researchers about our work.

Dissemination to system actors was done by a meeting in Stockholm in May 2000, to which a number of system actors was invited. Here we presented and discussed our work in the EGSIE project, especially our findings concerning the Swedish case in an international perspective. We also presented our work in a symposium on “Upbringing of Citizens), where important opinion makers in Sweden participated.

Dissemination to school actors was done by means of a special issue of “Pedagogiska Magasinet”, which is published by a teacher organization. Each number is published in 220 000 copies and will reach most Swedish teachers. The texts in this special issue were:

Lindblad, S (2001): Radikal kursändring av skolan. (Radical reorientation of education) Pedagogiska Magasinet, vol 5, nr , s 16 - 19.

Lindblad, S (2001): Slutsatser och reflektioner: Segregationen har ökat. (Conclusions and reflections: Social segregation has increased) Pedagogiska Magasinet, vol 5, nr , s 26-27

Lundahl, L (2001): Politiker och tjänstemän: Förändringar på gott och ont. (Politicians and administrators: Changes for good and bad) Pedagogiska Magasinet, vol 5, nr , s 19 – 22

Lindgren, J & Zackari, G (2001): Skolpersonal och elever: Skilda världar - olika villkor. (Teachers and students: Different worlds - different premisses) Pedagogiska Magasinet, vol5, nr , s 22-26

### Publications:

- Lindblad, S (2001): Radikal kursändring av skolan. (Radical reorientation of education) Pedagogiska Magasinet, vol 5, nr , s 16 - 19.
- Lindblad, S (2001): Slutsatser och reflektioner: Segregationen har ökat. (Conclusions and reflections: Social segregation has increased) Pedagogiska Magasinet, vol 5, nr , s 26-27
- Lundahl, L (2001): Politiker och tjänstemän: Förändringar på gott och ont. (Politicians and administrators: Changes for good and bad) Pedagogiska Magasinet, vol 5, nr , s 19 - 22
- Lindgren, J & Zackari, G (2001): Skolpersonal och elever: Skilda världar - olika villkor. (Teachers

and students: Different worlds - different premisses) *Pedagogiska Magasinet*, vol5, nr , s 22-26

- Restructuring the Welfare State and the Organizing of Social Inclusion and Exclusion in Sweden. Sverker Lindblad, University of Uppsala; Lisbeth Lundahl, University of Umea. AERA symposium. Educational Systems, Policy Discourses, and Social Integration and Exclusion: A Comparative Analysis of European Union.
- Governance, Social Exclusion, and Comparative Studies of Policy . Sverker Lindblad, Uppsala University; Thomas Popkewitz, University of Wisconsin-Madison. AERA symposium. Educational Systems, Policy Discourses, and Social Integration and Exclusion: A Comparative Analysis of European Union.

## **The UK**

The UK team presented two papers in the European Educational Research Association Conference in Edinburgh (September 2000) drawing from the EGSIE project

\* Publications:

Ozga J. (1999), "Two nations? Education and social inclusion and exclusion in Scotland and England", in *Education and Social Justice*, Vol.1, No.3, pp.44-50, 64.

and one paper - accepted on condition of revisions:

Alexiadou N. (2001), *Social Integration and Social Exclusion in England: A new role for education?*, in *Journal of Education Policy*

There are also papers that have drawn from the project albeit not relying exclusively on it:

Ozga J., Pye D. (2000), "Les zones d' action educative et la modernization de l' administration chargee des affaires scolaires en Angleterre", *Revue Francaise de Pedagogie*, Octobre-Novembre-December, No.133, pp.7-14.

Alexiadou, N., Lawn M. (2000), "Le nouveau discours educatif sous l' influence entrepreneurial: les secteurs public et prive dans les Zones d' Action Educative", *Revue Francaise de Pedagogie*, No.133, Octobre-Novembre-December, pp.25-36.

\* Seminars: Jenny Ozga gave a seminar presentation to the Education Department, Keele on "The rhetoric of social exclusion and the work of teachers" (March, 2001)

\* Conference: In June 2001, the Keele Education Policy Research Group is organising a conference with the title: *Travelling Policy / Local Spaces: Globalization, Identities and Education Policy in Europe*. All members of the UK-based team who have participated in the project throughout its duration (Jenny Ozga, Martin Lawn, Nafsika Alexiadou, Farzana Shain) will present papers in the conference drawing upon the findings of the EGSIE project.

In addition, many of the participants in the project from the other EGSIE countries are presenting findings from their case studies (Australia, Germany, Greece, Iceland, Spain, Sweden).

\* As a result of the above conference, there will be publications in the form of journal articles and an edited book that will include the reporting of EGSIE findings

## **6 Acknowledgements and References**

### **6.1 Acknowledgements:**

The EGSIE research project was carried out by the support of the European Commission, etc. It was also supported by the participant universities as well as national research councils. Several researchers contributed to the different studies and were commenting and discussing theories, designs, results and different outcomes from the studies. Their work is the basis for this report. Thanks to them the

EGSIE project was an inspiring intellectual journey. Below we present names of those who in different ways participated. The names are organized by the partner numbers:

**Partner 1 and coordinating partner: Uppsala University (Sweden)**

The Swedish studies were carried out with the support of the Research Council of the Social Sciences and Humanities and the National Board of Education. In the studies the following persons participated

Professor Sverker Lindblad, Uppsala University

Professor Thomas S. Popkewitz, University of Madison-Wisconsin

Ph D Lisbeth Lundahl; associate professor, University of Umeå.

B A Gunilla Zackari; researcher at Uppsala university, and expert at the Swedish ministry of education

B A Joakim Lindgren; research student, University of Umeå.

B A Johanna Strandberg; administrative coordinator and research assistant, Uppsala University

MA Annica Åberg, administrative coordinator and research assistant, Uppsala University

**Partner 2: University of Helsinki (Finland)**

Professor Hannu Simola, University of Helsinki

Professor Risto Rinne, University of Turku

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Ms Tiina Ronkainen, research assistant, University of Turku

**Partner 3: The Icelandic University College of Education (Iceland)**

In the EGSIE research the following persons participated in the production of reports and texts:

Ingólfur Ásgeir Jóhannesson, University of Akureyri ,

Guðrún Geirsdóttir, University of Iceland;

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## **7 Annexes**

*Work package I: Describing educational systems and reforms in different national contexts.*

### **Annex 1:**

Lindblad, S & Popkewitz, T (Eds) 1999: Education governance and social integration and exclusion: National cases of educational systems and recent reforms. *Uppsala reports on education no 34.*

In this report we have the following contributions:

- Australia: Ladwig, James G. & Griffiths, Thomas & Gore, Jennifer & Lingard, Bob: Education in post-penal, post-industrial, post-modern, soon-to-be post-colonial nation.
- Finland: Simola, Hannu & Rinne, Risto & Kivirauma, Joel: *National Changes in Education and Education Governance*
- Germany: Keiner, Edwin: *The German case.*
- Greece: Kazamias, Andreas M. & Roussakis, Yannis: Crisis and Reform in Greek Education: The Modern Greek Sisyphus
- Iceland: Jóhannesson, Ingólfur Ásgeir & Mýrdal, Sigurjón: *Our current state of mind*
- Portugal: Nóvoa, António & Alves, Natália & Canário Rui: *The Portuguese case*
- Spain: Pereyra, Miguel A. & Sevilla, Diego & Pablo, Castillo J.: *The Spanish Educational System: A Report*
- Sweden: Lindblad, Sverker & Lundahl, Lisbeth: Education for a re- or deconstruction of “the strong society”
- United Kingdom: Lawn, Martin & Ozga, Jenny: The cases of England and Scotland within the UK

*Work package II: Literature review on education governance and social integration and exclusion.*

### **Annex 2:**

Popkewitz, T, Lindblad, S & Strandberg, J (1999): Review of Research on Education Governance and Social Integration and Exclusion. *Uppsala reports on education no 35.*

Popkewitz, T, Lindblad, S 1999: Educational Governance and Social Inclusion and Exclusion: A Conceptual Review of Equity and Post-Modern Traditions. *Discourse, vol 17, no 1, p*

*Work package III: Analyses of public discourses in different settings.*

**Annex 3:**

Lindblad, Sverker and Thomas S Popkewitz (2000): Public discourses on education governance and social integration and exclusion. Analyses of policy texts in European contexts. *Uppsala Reports on Education, nr 36*.

In this report we have the following contributions:

- Sverker Lindblad & Thomas S Popkewitz: *Introduction*.
- Finland: Risto Rinne, Joel Kivirauma, Piia Hirvenoja & Hannu Simola: From Comprehensive School Citizen towards Self- Selective Individual
- Germany: Edwin Keiner, Sandra Muskat, Rita Stolbinger, Kathrin Tietze: Discourses on ‘Education Governance and/or Social Exclusion and Inclusion’ in Political Parties and Public Press in Germany.
- Greece: Andreas Kazamias & Evie Zambeta: Crisis and Reform in Greek Education-A Modern Greek Sisyphus: Analysis of Texts
- Iceland: Ingólfur Ásgeir Jóhannesson, Gunnar E. Finnbogason, and Guðrún Geirsdóttir: *Curriculum, management and self-evaluation in Icelandic primary and secondary schools*
- Portugal: António Nóvoa, Natália Alves e Rui Canário: Discourses on educational policy in an uncertainty context
- Spain: Miguel A. Pereyra and Pablo J. Castillo The official discourse of social integration in education in Spain. A text analysis report.
- Sweden: Lisbeth Lundahl: A New Kind of Order: Swedish Policy Texts Related to Governance, Social Inclusion and Exclusion in the 1990s
- England and Scotland: Jenny Ozga and Martin Lawn: *UK Text Analyses and Text Analysis Scotland:*
- Sverker Lindblad & Thomas S Popkewitz: *Comments and Discussion*.

*Workpackage IV: Listening to education actors.*

**Annex 4:**

Lindblad, S & Popkewitz, T. S. (Eds): Listening to Education Actors on Governance and Social Integration and Exclusion.

Contributions:

- Sverker Lindblad and Thomas S. Popkewitz: *Introduction and comments*
- Thomas G. Griffiths, Kellie Morrison and James G. Ladwig: *Australian systems actors speak: new (and old) mechanisms and constructions of old (and new) levels of social exclusion*
- Kellie Morrison, Thomas G. Griffiths and James G. Ladwig: *Australian teachers: educational governance and its relationship with social inclusion and exclusion*
- Risto Rinne, Joel Kivirauma and Piia Hirvenoja: *Nordic educational policy under siege: Finnish educational politicians tell their stories*
- Hannu Simola and Katariina Hakala: *Finnish school professionals talk about educational change*
- Edwin Keiner: *Education governance and social integration and exclusion: interviews with german teachers, school heads and system actors.*
- Evie Zambeta: *Public discourses on education governance, social inclusion and exclusion: political actors in Greek education*
- Eleni Karadjia: *Public discourses on education governance, social inclusion and exclusion: school actors in Greek education*
- Sigurjón Mýrdal, Ingólfur Ásgeir Jóhannesson, Guðrún Geirsdóttir and Gunnar E. Finnbogason: *Icelandic educators interviewed about governance and integration / exclusion*
- António Nóvoa, Natália Alves and Rui Canário: *Governance of education: interviews with Portuguese politicians and administrators*
- António Nóvoa, Natália Alves and Rui Canário: *Portugal: Governance of education: teachers' viewpoint*
- Miguel A. Pereyra, Juan Carlos González Faraco, Germán González, Julián Luengo, Antonio Luzón, Diego Sevilla, Pablo J. Castillo, Magdalena Jiménez, Mónica Torres: *Interviews with Spanish actors (political, social and educational).*
- Lisbeth Lundahl: *Governance of education and its social consequences. interviews with Swedish politicians and administrators.*
- Gunilla Zackari: *Swedish school actors about education governance changes and social consequences*
- Nafsika Alexiadou: *England: a report on the interviews with system actors.*
- Nafsika Alexiadou: *England: Educational governance and social exclusion: the school perspectives*
- Jenny Ozga, Farzana Shain, Joan Stead, and Pamela Munn: *Education governance & social exclusion / inclusion. a report on the interviews with Scottish system actors.*
- Nafsika Alexiadou, Joan Stead and Pamela Munn: *A report on the interviews and survey of Scottish school actors*

*Work Package V: Patterns of social integration and exclusion in relation to education:*

#### **Annex 5:**

Lindblad, S & Popkewitz, T (Eds) *Statistics on education and social inclusion and exclusion in international and national contexts.*

- Popkewitz, T and Lindblad, S: Introduction
- Lindblad, Sverker On educational systems and social inclusion/exclusion as constructions in international statistical information.
- Lindblad: Sverker, Lundahl, Lisbeth, & Åberg, Annica: Statistical indicators – Sweden..
- Popkewitz, T and Lindblad, S: Educational statistics, equity problems and systems of reason: relations of governing education and social inclusion and exclusion
- Rinne, R Kivirauma, J & Simola, H: The turning point in educational policy and the marginalisation of youth in Finland in the 1990s in the light of statistics
- Gunnar Finnbogasson : The statistical and social status of children and youths in modern Icelandic society. Study Report.
- Woolley, P & Alexiadou N: Statistical Indicators England and Scotland.
- Mohr, Kroschel, Keiner, E : Education Governance and Social Integration and Exclusion. Transition Points and Drop Outs in the Context of Statistics in Germany.
- Perez, P. Castillo: Sapin: Statistical Indicators
- Nóvoa, A; N. Alves, &R. Canário: Social inclusion and exclusion in Portugal: a statistical approach.
- Eleni Karadjia: Statistical indicators referring to educational governance and social inclusion/exclusion. The Greek case
- Griffiths, T: Australian Statistical Indicators of Social Inclusion

*Work package VI: Studies in education governance and social integration and exclusion of youth.*

**Annex 6:**

Rinne, Risto; Kivirauma, Joel; Aro Mikko; & Simola, Hannu: *Liberal, Conservative and Nordic: Opinions of the Youth and the New Educational Policies of Five Post-Industrial Countries in a Comparative Perspective.*

*Workpackage VII: Final report: The current text plus:*

**Annex 7:**

Lindblad, S and Popkewitz, T: Education Governance and Social Integration and Exclusion: Studies in the Powers of Reason and the Reasons of Power (draft version of and extended final report)

- Sverker Lindblad and Thomas S Popkewitz: Introduction To The Problematics
- Sverker Lindblad and Thomas S Popkewitz : A Review of Educational Systems And Cases of Social Inclusion And Exclusion

- James G Ladwig And Jennifer M Gore :Australia: The Imposition of a Schooled Habitus.
- Hannu Simola, University of Helsinki, Risto Rinne, University of Turku, Joel Kivirauma, University of Turku
- Shifting Responsibilities, Insolvent Clients and Double-Bound Teachers - The Appearance of a New System of Reason In Constructing Educational Governance and Social Exclusion/Inclusion In Finland?
- Edwin Keiner Summary Report - Germanyeducation Governance and Social Exclusion and Integration.
- Ingólfur Ásgeir Jóhannesson, (Ed.); Guðrún Geirsdóttir,;Gunnar E. Finnbogason, Sigurjón Mýrdal: Changes In Patterns of Educational Governance and Social Integration and Exclusion In Iceland at The Beginning of a New Millennium.
- António Nóvoa, Natália Alves, Rui Canário Portugal: School and Social Exclusion: From Promises To Uncertainties
- Miguel A. Pereyra, Antonio Luzón, Mónica Torres, Juan Carlos González Faraco, Diego Sevilla: Social Inclusion and Exclusion In Spain: The Blurring Images of a Reformed Schooling
- Sverker Lindblad, Lisbeth Lundahl and Gunilla Zackari Sweden: Increased Inequalities - Increased Stress on Individual Agency
- Nafsika Alexiadou, Martin Lawn and Jenny Ozga :Educational Governance and Social Integration/Exclusion: The Cases of Scotland and England Within The Uk.
- Risto Rinne, Joel Kivirauma, Mikko Aro & Hannu Simola : Liberal, Conservative and Nordic: Opinions of The Youth and The New Educational Policies of Five Post-Industrial Countries In Comparative Perspective
- Thomas S Popkewitz and Sverker Lindblad: Comments and Conclusions