

Minerva Access is the Institutional Repository of The University of Melbourne

Author/s:
Senior, Caitlin

Title:
Evolving equity for better and fairer education systems

Date:
2026

Persistent Link:
<https://hdl.handle.net/11343/370549>

Terms and Conditions:
Terms and Conditions: Copyright in works deposited in Minerva Access is retained by the copyright owner. The work may not be altered without permission from the copyright owner. Readers may only download, print and save electronic copies of whole works for their own personal non-commercial use. Any use that exceeds these limits requires permission from the copyright owner. Attribution is essential when quoting or paraphrasing from these works.

Evolving equity for better and fairer education systems

Caitlin Senior

ORCID 0000-0002-6201-1683

Submitted in total fulfilment of the requirements of the degree of

Doctor of Philosophy

March 2026

*Faculty of Education
University of Melbourne*

Abstract

Over the past three decades, education systems worldwide have increasingly positioned equity as a central policy objective, yet educational inequity remains a persistent global trend. While inequity is shaped by multiple complex and interconnected factors, one foundational issue that remains under-examined in the research literature is the absence of a shared understanding of what equity in education means. When literature does address that issue, it often examines the lack of common understanding using a single lens, for example, theoretically, between schools, or at the system level. This study is distinctive in examining how equity is understood across global, system, and school levels within a single study, thus attending to the multi-scalar nature of education policy design and enactment.

Drawing on empirical analysis of OECD policy texts, alongside qualitative data from policymakers and school leaders in Scotland and South Australia, the study confirms a lack of clarity and coherence in understandings of equity across global, system, and school levels. It also finds similar disconnects between system-level equity related policies and practices and their context-specific enactment at the school level in Scotland and South Australia.

Rather than suggesting the need for a single, fixed definition of equity, the findings point to the importance of a clearer, collaboratively developed, multidimensional understanding of equity at the system level, one that provides shared direction while explicitly enabling schools and communities to interpret and enact equity in ways that are meaningful to their local contexts. Another overall conclusion is that equity in education has been an evolving concept and will likely continue to evolve and remain a main policy aim in the future. As such, developing a better understanding of what equity in education means can be an important foundational step towards better and fairer futures for all.

Declaration

This is to certify that:

- a) the thesis comprises only my original work towards the PhD thesis except where indicated in the preface
- b) due acknowledgement has been made in the text to all other material used
- c) the thesis is no longer than the maximum word limit in length, exclusive of tables and appendices

Preface

Thesis with publications

This thesis is not presented in the format of a traditional PhD thesis. Instead, it follows the format that the University of Melbourne refers to as a *thesis with publications*. At the University of Melbourne, several approaches exist for incorporating publications into a doctoral thesis (The University of Melbourne, n.d.). The approach adopted in this thesis involves the inclusion of three full publications as distinct, standalone chapters. In this format, the publication chapters take the place of traditional thesis chapters. The three publications included in this thesis have either been published or are currently under peer review.

Due to this structure, the thesis does not contain a single, comprehensive literature review chapter or a standalone methods chapter of the kind typically found in a traditional thesis. Instead, each publication chapter includes its own literature review and methods section. To avoid unnecessary duplication, I strived to restrict the reproduction of these elements elsewhere in the thesis, though some overlay is included for enhanced coherence.

The publication chapters appear as Chapters 3, 4, and 5. Together, these chapters provide the key literature review material related to the central focus of the thesis, equity in education, as well as background context relating to the two education systems examined in this research: Scotland and South Australia. Chapters 1 and 2 of this thesis are therefore structured differently from what might be expected in a traditional thesis. Rather than repeating literature and methodological content already presented in the publications, these chapters provide framing, context, and orientation for the thesis as a whole.

This explanation is included in the preface to assist the reader in understanding the structure of the thesis. Readers are encouraged to consider the thesis holistically, across both

the publication chapters and the non-publication chapters, when interpreting the literature review, methods, and analysis that together constitute the full research contribution.

Finally, it is worth noting that theses in the *thesis with publications* format are typically shorter than traditional monograph-style doctoral theses. While a conventional PhD thesis is often around 80,000 words, theses with publications are commonly closer to 50,000 words. The length of this thesis is consistent with expectations for the thesis with publications format.

Publications forming part of this thesis

Chapter 3: Senior, C., & Sahlberg, P. (2025). The evolution of the OECD’s position on equity in global education. *International Journal of Educational Development*. Volume 114, 103241. <https://doi.org/10.1016/j.ijedudev.2025.103241>. The *International Journal of Educational Development* is a leading peer-reviewed international journal publishing high-quality research on education policy, reform, and development in global contexts. It is widely recognised for advancing scholarship on equity, system change, and the role of education in social and economic development.

Author	Proportion	Contributions
Caitlin Senior	70%	Conceptualisation, Writing – original draft, Writing – review & editing
Pasi Sahlberg	30%	Supervision, Conceptualisation, Writing – review & editing

Chapter 4: Senior, C. (2026). Policymakers’ Conceptions of Equity in Education in Scotland and South Australia. Submitted to the *Australian Educational Researcher*. The *Australian Educational Researcher* is a respected peer-reviewed journal that plays a

significant role in connecting educational research with policy and practice, particularly within Australia’s reform community. Publishing in this journal enables direct engagement with policymakers, system leaders, and scholars working on equity-oriented and system-level change. The *Australian Educational Researcher* is also the journal that is associated with the Australian Association for Research in Education.

Author	Proportion	Contributions
Caitlin Senior	100%	Conceptualisation, Methodology, Investigation, Formal analysis, Writing – original draft, Writing – review & editing

Chapter 5: Senior, C., Sahlberg, P., & Savage, G. (2026). Equity in Practice: School leaders’ views in Scotland and South Australia. *School Leadership & Management*. Issue 2, 2026.
<https://doi.org/10.1080/13632434.2026.2637970>. *School Leadership & Management* is an influential peer-reviewed journal that connects research with leadership practice, contributing to international conversations on how school and system leaders can foster improvement, collaboration, and equity.

Author	Proportion	Contributions
Caitlin Senior	75%	Conceptualisation, Methodology, Investigation, Formal analysis, Writing – original draft, Writing – review & editing
Pasi Sahlberg	15%	Supervision, Conceptualisation, Methodology, Writing – review & editing
Glenn Savage	10%	Supervision, Conceptualisation, Methodology, Writing – review & editing

Acknowledgements

An acknowledgement here cannot fully express my gratitude to my principal supervisor, Professor Pasi Sahlberg, for continuing this research journey with me, from my master's studies through to this PhD. It has been a privilege to learn from and work alongside him over these years. His guidance, insight, support, encouragement, patience, consideration, generosity, and time he provided me throughout this process were invaluable. I could write much more about what an exceptional supervisor he is; however, in the spirit of his regular advice regarding my writing, and of the traditional brevity of an acknowledgements section, I hope that simplicity and concision will suffice.

I would also like to thank my brilliant co-supervisor, Professor Glenn Savage, for his support, counsel, suggestions, and time. His thoughtful engagement and guidance were greatly appreciated throughout this research. My sincere thanks as well to my advisory committee chair, Professor Kylie Smith, and my advisory committee member, Professor Alma Harris, for their generous support and advice throughout my candidature.

I want to also acknowledge and thank the Scottish and South Australian Governments, including their respective Departments for Education, for their support of this research.

Thank you also to those who I had the opportunity to meet through this process who shared their knowledge and insights in support. This research would not have been possible without you.

I also want to acknowledge that this research was supported by the Commonwealth through an Australian Government Research Training Program Scholarship [DOI: <https://doi.org/10.82133/C42F-K220>].

Lastly, I would also like to thank my wonderful family and friends for their consistent check-ins, their willingness to listen, and their steady support. Thank you all.

Table of Contents

Abstract	ii
Declaration	iii
Preface.....	iv
Acknowledgements	vii
Table of Contents	viii
List of Abbreviations	x
Chapter 1. Introduction	1
1.1 Overall aim of this thesis	3
1.2 Research question and sub-questions	8
1.3 Significance of this study	9
1.4 Summary of literature on equity in education reforms	10
1.5 Thesis structure	18
Chapter 2. Methodology	21
2.1 Overview of Chapter 2	21
2.2 Overall approaches for this research	21
2.3 Research design	28
2.4 Considerations, limitations, issues of reliability, and validity.....	38
Chapter 3. The evolution of the OECD's position on equity in global education	41
3.1 Highlights.....	41
3.2 Abstract.....	41
3.3 Introduction.....	42
3.4 From equality of opportunity to equity of outcomes in education	44
3.5 The rise of the OECD as the global education policy authority.....	48
3.6 The OECD's evolving approach to equity in education in the 21st century	52
3.7 Brighter future of equity in education.....	68
Chapter 4. Policymakers' conceptions of equity in education in Scotland and South Australia	71
4.1 Abstract.....	71

4.2 Introduction.....	71
4.3 A brief review of equity in education	73
4.4 The education system and equity background in Scotland	79
4.5 The education system and equity background context in South Australia.....	85
4.6 Methods.....	88
4.7 Data Analysis	90
4.8 Conclusions	96
Chapter 5. Equity in Practice: School leaders' perspectives in Scotland and South Australia	99
5.1 Abstract.....	99
5.2 Introduction.....	99
5.3 Policy enactment and leadership for equity.....	102
5.4 Methods.....	106
5.5 Findings	112
5.6 Discussion and Implications	121
Chapter 6. Conclusions	126
6.1 Understanding equity in education.....	126
6.2 Meta-framings emerging from the study.....	129
6.3 Four scenarios for understanding equity in education.....	130
6.3 How should equity in education be defined?	135
6.4 Further considerations.....	138
6.5 Continuing the evolution and the research	142
References.....	144
Appendix.....	187
Appendix A.....	187
Appendix B.....	189
Appendix C.....	191

List of Abbreviations

BFSA	Better and Fairer Schooling Agreement
CfE	Curriculum for Excellence
COVID-19	Coronavirus Disease
ESCS	Economic, Social and Cultural Status
GERM	Global Educational Reform Movement
GFC	Global Financial Crisis
NAPLAN	National Assessment Program – Literacy and Numeracy
NIF	National Improvement Framework
OECD	Organisation for Economic Co-operation and Development
PEF	Pupil Equity Funding
PISA	Programme for International Student Assessment
PRAG	Poverty-Related Attainment Gap
SA	South Australia
SAC	Scottish Attainment Challenge
SACE	South Australian Certificate of Education
SDGs	Sustainable Development Goals
SRS	Schooling Resource Standard
UNESCO	The United Nations Educational, Scientific and Cultural Organization
UNICEF	United Nations International Children's Emergency Fund

Chapter 1. Introduction

Since the advent of formal education, children from more socioeconomically advantaged backgrounds have, in general, had greater access to educational opportunities than their less advantaged peers. Mass public schooling was advocated to disrupt this pattern of inherited privilege, to function as a “great equaliser” (Jackson, 2013; Mann, 1890). Yet internationally comparable data from the Programme for International Student Assessment (PISA) that is administrated by the Organisation for Economic Co-operation and Development (OECD), has clarified the enduring nature of these disparities, consistently showing that overall, socioeconomically advantaged students outperform socioeconomically disadvantaged students (McGaw, 2008; OECD, 2012; 2025).

Despite decades of reform efforts across education systems worldwide aimed at narrowing such achievement gaps, these disparities persist, and in some contexts are widening. For example, the attainment gap in Scotland between the richest and poorest students has not improved in recent years despite almost £2 billion invested and a national prerogative to address that gap for over a decade (Adams & McCloskey, 2026). Also, in Australia, children from lower socio-economic backgrounds, and more regional and remote areas continue to generally achieve lower education outcomes than their more urban-based and higher socio-economic background peers; and outcomes between Indigenous and non-Indigenous children have not improved, despite national goals and initiatives to address them (ACARA, 2025; Commonwealth of Australia, 2026).

Unjust inequalities between groups of children remain entrenched, carrying compounding negative lifelong and societal consequences for all (OECD, 2023; 2025; Wilkinson & Pickett, 2011; 2018). Reflecting on this state of global affairs, Fullan (2025)

critiques recent decades of education reform as largely static, marked by limited structural transformation and insufficient impact on enduring inequities. As Kerr and Ainscow contend (2024, p. 99):

This situation presents a moral imperative for policymakers, educators and researchers to work together, and with the communities they are seeking to support, in ways that can move education systems in more equitable directions.

At the global level, the United Nations' Sustainable Development Goals (SDGs), launched in 2015, set an ambitious agenda for 2030. UNESCO's SDG 4 commits nations to "ensure inclusive and equitable quality education and promote lifelong learning opportunities for all." Yet SDG 4, like many of the goals, is not on track to be realised by 2030. In response to mounting global challenges, described as a poly-crisis (Siirilä & Salonen, 2024), UNESCO encourages a "laboratory of ideas" to generate innovative approaches capable of advancing more just, sustainable, and connected futures (UNESCO, n.d.). There is broad consensus that education systems must respond to rising inequality, civil unrest, climate instability, and concerning declining trends in children's health, wellbeing, and learning (Aiston & Walraven, 2024; Sahlberg et al., 2025). However, there is far less clarity about how education systems should be positioned to do so effectively and fairly in practice. As Sahlberg (2019, p. 1) observes, "improving education systems is not rocket science – it's more complicated than that."

This thesis engages directly with that complexity. It examines how education systems seek to address unjust inequality through the increasingly prominent concept of equity in education. Rather than focusing on particular policies or reform initiatives, the thesis addresses a more foundational question: what does equity in education actually mean? That is, this thesis responds to UNESCO's call for innovation in a distinctive way: by stepping back to interrogate the conceptual foundations that underpin equity-focused reform. Before

continuing reform approaches that have often yielded limited or uneven progress, I argue that we must step back and critically interrogate the conceptual foundations of equity itself. If achieving equity has proven persistently difficult, it may be in part because understanding what equity means in education systems is itself far more complex than commonly assumed.

Although equity is widely invoked in policy rhetoric, it remains loosely defined and variably interpreted across systems and contexts. Rather than assuming a shared or self-evident understanding, this thesis contends that greater conceptual clarity is an essential precondition for more coherent and effective policy and practice. Such foundational work is rarely foregrounded in equity-focused reform, yet without it, efforts to advance equity risk continued fragmentation, misalignment, and limited impact. As Ainscow (2020, p. 9) observes regarding equity in education, “put simply, if there is not a shared understanding of the intended direction, progress will be difficult.”

This chapter introduces the overall aims, research questions, relevant literature, and significance of my thesis. It situates the study within contemporary debates on equity in whole-system education policies and reforms. It outlines the research questions that motivate this project and describes the structure of the thesis, demonstrating how each chapter contributes to the findings and conclusions discussed in the final chapter.

1.1 Overall aim of this thesis

The current Federal Minister for Education in Australia has repeatedly stated that “Australia has a good school education system, but it can be a lot better and a lot fairer” (Ministers’ Media Centre, 2023, p. 1). “Better and fairer” are comparative adjectives used in the new Federal schooling agreement called the *Better and Fairer Schooling Agreement (BFSA) 2025-2034* that has been signed by all Australian states and territories. In that recent agreement “equity and excellence” is one of the three main focus areas for school reform.

Equity is also increasingly a policy priority in many education systems around the world (Varsik, 2022). But according to many different indicators, equity in education is not advancing (ACER, 2024; Adams & McCloskey, 2026; OECD, 2023; 2025). That is, education systems are not generally becoming more equitable, meaning children from more traditionally socioeconomically advantaged backgrounds continue to attain higher education outcomes than their more traditionally socioeconomically disadvantaged peers. As Kerr and Ainscow (2024, p.99) put it, “advancing equity is a major challenge facing education systems globally” despite sustained reform efforts.

Though there has been increased equity discourse, there is no one universal definition of equity in education. What’s more, and what I argue in this thesis is connected to the lacking advancement of equity in education globally, is that despite being a policy priority in many education systems around the world, what equity in education means is often described inconsistently, or in too vague or overly narrow ways. For example, Sahlberg and Cobbold (2024) argue that the *BFSa* in Australia “lacks a clear definition of equity” and includes deficient targets to assess educational progress, including equity.

Evidence suggests that not only in Australia is the goal of advancing equity in education systems unclear, but that this is a global issue as well, including for those who are tasked with turning the concept into practice (Cairney & Kippin, 2022; Edgar, 2022; Sahlberg & Cobbold, 2021). When there is a lack of clarity regarding what a policy aim means, there is unsurprising lacking operationalisation and accountability, which can mean likely inefficient and unsuccessful allocations of resources to achieve espoused aims. Since past evidence and anticipated education futures suggest that raising outcomes for those furthest behind lifts overall system performance, and if resourcing is unlikely to increase substantially, then the persistent lack of clear policy understandings of equity becomes particularly consequential. It is worth noting, however, that even with perfect definitional

clarity, equity in education fails to advance due to political reasons, resource constraints, broader structural inequality, and other interconnected factors, therefore, conceptual clarity regarding equity in education would be a necessary but not sufficient precondition for actualising equity in education.

The first national Australian curriculum was released in 2010, with aims to promote greater education quality and equity for all Australian children (ACARA, 2020). The implementation of the national curriculum in Australia with the corresponding National Assessment Program – Literacy and Numeracy (and the MySchool reporting website) has been observed to have produced typical negative-side effects of a GERM approach (Sahlberg, 2023), or what Fullan (2021) describes as “wrong drivers” for education reform. Such negative side-effects include: performativity, narrowing of the curriculum, de-professionalisation of teaching staff, student disengagement, and greater inequity in education (De Saxe et al., 2020; Hargreaves, 2020; Hickey & Riddle, 2023; Keddie et al., 2020; Molla, 2025; Sahlberg, 2016; Yoon, 2024; Zhao, 2017). Those negative side-effects are also connected with Australia’s exceptionally highly privatised and marketised education system (Rowe & Lubienski, 2016; Savage, 2017; Thompson & Hogan, 2025).

Scotland, which is the other jurisdiction researched in my project, has had successful drive with its “Curriculum for Excellence,” a national programme first published in 2004 and still alive and well. It is one of the longest surviving national curriculum reforms globally still in use that aims to move away from rigid, knowledge-based teaching toward a more holistic, skills-based approach, and to do that so that each and every student benefits.

In addition to curriculum, both Scotland and Australia have initiated a myriad of education system improvement reforms and policies aimed at enhancing equity and quality in their education systems (e.g. Cost of the School Day in Scotland and the implementation of universal three-year-old preschool in South Australia). Despite some similar and some

differing approaches to reform initiatives, these two examples of relatively well-performing education systems, Australia and Scotland, that similarly struggle to advance equity in their education systems indicate that there might be something important missing in the education reform architectures in these countries and around the world. Despite all efforts to strengthen equity in education systems, the world generally seems to be stalling and/or going backwards regarding equity in education.

Scotland and South Australia were chosen as the two case study systems for this thesis for several interconnected reasons that are worth briefly signposting here, before fuller elaboration in Chapters 2, 4, and 5. Primarily, both systems have placed equity explicitly at the centre of education improvement agendas. In Scotland, achieving “excellence and equity” are the dual governing priorities of the National Improvement Framework (NIF), expressed specifically as “ensuring every child and young person has the same opportunity to succeed, no matter their background” (Scottish Government, 2024, p. 2). In South Australia, the government’s Strategy for Public Education similarly foregrounds equity and excellence as a central priority area, with a broader orientation toward collaboration, wellbeing, and agency across the system, and this operates within the context of the national *Alice Springs (Mparntwe) Education Declaration (2019)*, which establishes “excellence and equity” as dual overarching goals for all Australian schooling (Council of Australian Governments Education Council 2019, 1). Scotland and South Australia have also backed these stated priorities with substantial investment: for example, Scotland has directed significant funding toward closing the poverty-related attainment gap through the Scottish Attainment Challenge (SAC) and Pupil Equity Funding (PEF) mechanism, while South Australia has initiated universal preschool provision and a range of whole-child reform efforts. As part of the *BFSa 2025-2034*, South Australia will receive increased Federal funding for school education as well.

What makes this pairing particularly productive for the purposes of this thesis is the combination of structural similarities and meaningful differences between the two systems. Both Scotland and South Australia are relatively wealthy, English-speaking OECD jurisdictions with strong public education traditions and long-standing commitments to equity as a policy goal. Yet their governance architectures differ significantly: Scotland operates as a devolved national system with 32 local authorities, while South Australia is a sub-national state within an Australian federation, with national-level policy frameworks setting parameters within which the state operates. Their accountability structures, curriculum designs, and funding mechanisms also differ in important ways (see Chapters 4 and 5).

Despite these differences, and the scale of reform investment in each, neither system has demonstrably succeeded in advancing equity of outcomes in recent years (ACER, 2024; Adams & McCloskey, 2026). This convergence of reform ambition and limited progress, across two structurally different systems, makes Scotland and South Australia especially illuminating cases for interrogating a foundational question: could part of the explanation lie not only in what policies are designed or how they are resourced, but in how equity itself is understood across and within these systems? That is precisely the question this thesis is designed to address.

In prelude to my PhD thesis, my master's thesis considered the role that policymakers' understandings of equity in education impacted how equity was addressed in their education system. A main finding from that research was that how equity in education was defined and understood by education system policymakers impacts how policies and practices are designed to address equity in education systems (Senior, 2021). That finding is aligned with other findings that highlight connections between policymakers' perceptions and conceptions, policy design choices, and policy effectiveness in practice (e.g. Adamson et al.,

2016; Comstock, 2025; Espinoza; 2007; Frønes, 2020; Howlett et al., 2020; Parks et al., 2023; Nguyen, 2025; Zhou et al., 2023).

An implication from that research finding is that better understanding of equity in education by policymakers, and theoretically others could lead to equity in education being better addressed in education systems, resulting in better and fairer education for all. For this thesis, I sought to build on my graduate work while widening the scope of inquiry, broadening to explicitly consider the global and school levels as well as the system level. I chose to broaden the scope due to the multi-scalar nature of education policy design. For example, the OECD and other international organisations have and continue to significantly influence global education system governance, including how equity in education is understood and addressed in education systems around the world. Additionally, “it is in schools that policies take the form of specific resources, teaching practices and instructional and non-instructional support mechanisms” (OECD, 2023, p. 12), often referred to as policy enactment. Accordingly, I next outline my research questions for my thesis study.

1.2 Research question and sub-questions

The lack of a consistent, clear, and commonly accepted definition of equity in education has been one challenge for education systems striving to enhance equity in education (Sahlberg & Cobbold, 2021). Muddling the lack of clarity, as articulated by Kerr and Ainscow (2024, p. 106) is the consideration that “equity is not a unitary concept to be similarly applied to all situations.” Furthermore, varying ideas about what equity in education means have evolved with continued research, changes in society, and future ideas about the purpose of school education, amongst other factors.

The intention is that this thesis will contribute to the evolving knowledge base and provide new insights on how equity in education is understood in education systems. The

overall aim of this thesis research project is to help education systems to better understand what equity in education means. As such, this thesis is designed to answer the following overall research question: *How is equity in education understood in education systems?* I will answer this question by answering the following questions:

1. *How and why has the concept of equity in education evolved to become a key education system policy priority globally?*
2. *How is equity in education understood and translated into public policies and education reforms by policymakers?*
3. *How are equity-related system level education policies practiced in schools?*

1.3 Significance of this study

Education systems and schools are often looked to as mechanisms to mitigate greater societal injustice as it is regularly accepted and understood that the better education and schooling experiences and outcomes children receive, the better their holistic life outcomes are likely to be (Darling-Hammond et al., 2020; UNESCO, 2021). Many also point out that schools cannot rectify all of societies' historic and contextual injustices, but schools can and do make a difference (Aiston & Walraven, 2024; Downey & Condron, 2016; Riddle, 2024; Savage, 2021; Scheerens & Bosker, 1997; Sriprakash, 2023). This thesis is part of the global effort to try to evolve understanding regarding how education systems could be better and fairer for all; that is, more equitable.

The hope for better and fairer future societies is often connected to ideals about equity in education. Yet, as relayed earlier in this thesis, there is not a universal and clear definition of equity in education. This research project is significant in that it addresses an overall important and obvious question to the state of inequity in education: How should equity in education be defined to advance equity in

education? Would it be beneficial to children and societies if equity in education was addressed in a clearer way?

Those are questions that many education system policymakers and school practitioners consider. Literature and observations from other documents (e.g. news media) suggests policymakers can be comfortable contending that school contexts are so different that equity cannot be defined in a clear or universal way (Fowler, 2022; Levinson et al., 2022; Productivity Commission, 2023). Principals and practitioners, on the other hand, have put forth that they do not know exactly what equity in education means, or is intended to mean in their system, and that there are lacking resources to adequately support students (Savage, 2013; Theoharis, 2024).

As Cairney (2025, p. 1) states, “the pursuit of policymaking integration and policy coherence represents the ultimate gap between aspiration and reality.” The questions posed and issues raised in this section are main questions and issues that my thesis study will consider, to help policymakers and education systems consider, not just through theoretical conjecture, but through empirical research. This project will try to figure out how do we tackle this unsettled question: do we need to have a one clear idea of what equity in education means or should we rely on more localised or contextual ideas, and accept that there will be no universal definition?

To set a general context for how current understandings of equity in education have been addressing equity in education systems, I next provide a brief literature review of how equity in education has been understood in education reforms around the world over the past several decades, and the consequences of those understandings.

1.4 Summary of literature on equity in education reforms

More recent educational equity ideals see the change to greater educational equity as connected to our world's greatest chance for more sustainable futures for all (e.g. UNESCO, 2021). That is, if education systems can be flexible, relevant, of high-quality and innovative enough to optimise the enormous holistic potential in every child, and not just some (mostly more already advantaged) children, there will be greater diversity, collective capacity and ingenuity to resiliently tackle our great global challenges. However, as Sahlberg (2023, p. 2) reminds us "how to change a whole education system... remains one of the hardest questions among researchers and policymakers around the world today." Education reform often refers to such whole system change rather than specific parts of the system.

Education reform relates to the desires and attempts via education policies and practices to change education systems to better meet societal and individual needs. Reform efforts have persisted for centuries. The basis for these efforts is often couched in the notion that current education policies and practices are not sufficient now and will not suffice for the future for individual and societal success (Auld & Morris, 2016). Education reform involves thinking about what and how policies and practices could change to improve education system outcomes.

Education reform is influenced by a multitude of factors including individual actors (e.g. policymakers), local education and societal contexts, global contexts, globalisation, understandings of educational research and practice, reports from international organisations, political agendas, beliefs, values, and objectives, amongst other factors. As Van Heertum and Torres (2011) observe (in regard to the United States, but as can be applied elsewhere), no political leaders over the past several decades have openly advocated for education reforms that provide "quality education to only a subset of the population"... "and yet the general nature of reforms since the Reagan years (in the 1980s) appear to have succeeded in

deepening educational gaps across racial and class lines...” (p. 4). As Antony-Newman (2023, p.74) observes also since the 1980s:

...a more profound understanding of educational inequality caused by structural barriers shaped by class, race, and gender led to initiatives aimed at fostering equity in education to ensure that all students can achieve excellence regardless of their background or family circumstances.

There have been differences and similarities over the past decades amongst and within education systems in terms of approaches to education system reform, with varying outcomes. Some education systems have operated with an underlying belief that their educational policies must include some inequity to produce high quality outcomes (Parker et al., 2018). That thinking is in line with the historical economic position of “a tradeoff between efficiency (and to some extent economic growth) and equality” or greater equity (Klees & Qargha, 2014, p. 324). Others, in Nordic countries for example, have operated more with an underlying belief of equality for all that supports sustainable national development (Krejsler & Moos, 2021). Many recent education reform objectives around the world are related to improving equity and quality (or excellence) of education outcomes for all. How equity in education is understood and approached in education reforms can affect equity of education system outcomes (Adamson et al., 2016). The next sections outline the relatively recent evolution of different approaches to equity and education reform.

Before reviewing the broader trajectory of equity-focused education reform, however, it is important to briefly establish what is at stake in the concept of equity itself, since one of the central arguments of this thesis is that equity has been deployed as a policy priority without sufficient attention to its meaning. As I argue in depth in the chapters to follow, equity is not a self-evident term and is highly contested. Despite its widespread use in education policy discourse, it is regularly described in the research literature as a “chameleon

term” (Lingard et al., 2014; Savage, 2013): a concept that shifts meaning depending on who is using it and in what context. Sellar and Lingard (2014a, p. 2), for example, draw attention to the many possible policy framings of equity in relation to education and how these have changed significantly over time and across contexts. Understanding what equity means (and why it is so contested) is therefore a necessary foundation for the empirical work that follows in this thesis.

A common conflation in existing literature and policy debate is between equity and equality. The two terms are frequently used interchangeably in policy documents and reform discourse, often under the banner of “equality of opportunity” or “equality of access”. The underlying logic here is that inequitable outcomes result from unequal access to the same educational opportunities (Espinoza, 2007; Jencks, 1988). This conception has generated important policy interventions, from desegregation in the United States to needs-based funding models in Australia and Scotland.

However, it is now widely accepted that treating all children *the same* does not necessarily produce more equal outcomes, because children enter education with different needs, motivations, capacities and background circumstances (Levinson et al., 2022). The concept of equity evolved, in part, to address this limitation and to distinguish between providing equal inputs and achieving fair outcomes (see Gutiérrez 2002).

A second common framing positions equity primarily in terms of “achievement gaps” or “attainment gaps”: referring to measurable differences in outcomes between students from different socioeconomic groups or other equity categories. This conception was significantly advanced by the Coleman Report (1966) and has since been institutionalised in recent decades through OECD PISA data and national policy frameworks. In Scotland, the central equity policy objective is framed explicitly as “closing the poverty-related attainment gap” (Scottish Government, 2024). In Australia, one equivalent is the “Closing the Gap”

framework targeting disparities between Indigenous and non-Indigenous students, but the same logic can also be seen in debates about differences in outcomes across different equity groups in relation to standardised literacy and numeracy testing. While this focus has generated important accountability mechanisms, critics argue that it encourages a narrow emphasis on measurable outcomes at the expense of broader dimensions of educational equity, and that it can perversely exacerbate inequity by incentivising schools to ‘teach to the gap’ rather than to the whole child (Adamson et al., 2016; Sahlberg, 2023).

A third conception frames equity as adequacy: ensuring that all students receive an education sufficient to enable full participation in adult society, regardless of where that places them relative to more advantaged peers (Sahlberg & Cobbold, 2021; Brighouse et al., 2018). This framing focuses on minimum thresholds rather than comparative gaps, and opens up questions about what an ‘adequate’ education should encompass (e.g. whether it is confined to literacy and numeracy or extends to wellbeing, agency, belonging, and civic capacity).

More recent scholarship has pushed toward multidimensional conceptions of equity in education that resist reduction to any single metric. Ainscow and colleagues (2013), for instance, argue that equity must consider an ecology of interconnected factors spanning conditions within schools, between schools, and beyond schools, encompassing the structural and socioeconomic forces that shape what schools can achieve. The OECD's most recent frameworks similarly suggest that equity should be assessed across inputs, processes, and outcomes, including wellbeing outcomes and sense of belonging alongside academic achievement (OECD, 2023).

These varying conceptions are not merely academic distinctions. They carry direct consequences for how equity is prioritised, measured, resourced, and held to account in education systems. A system that defines equity primarily as closing the literacy attainment

gap will likely design different policies, deploy different accountability mechanisms, and allocate resources differently than one that defines equity as ensuring every child's holistic flourishing. The plurality of competing definitions in circulation (across global organisations, national governments, and schools) is therefore not a peripheral problem but a foundational one, and one that motivates the inquiry undertaken in this thesis.

The recent past and the rise of neoliberal-based approaches

The 1950s and 1960s brought with them increased societal and political focus on civil rights, equality and the importance of education for all for national economic prosperity in line with human capital theory (Lundgren, 2002). The infamous Coleman report in 1966 sparked educational change objectives focused on improving education outcomes for all, with a particular focus on more socioeconomically disadvantaged students. School effectiveness and school improvement researchers began to better investigate and understand how to improve student outcomes in a particular school. Hargreaves and Goodson (2006, p. 18) describe the 1970s as a time of “innovation and optimism” in education. But, how to improve all schools and student outcomes in an entire education system remained a more difficult challenge (Sahlberg, 2023). Focusing on the system level is important, as the American Statistical Association (2014, p. 2) concluded in its literature review of the use of a value-added model to assess the effect of teachers and schools on student achievement: “the majority of opportunities for quality improvement are found in the system-level conditions”.

In the 1980s, the *Education Reform Act (ERA)* (1988) in England significantly centralised, standardised and commercialised education in line with greater neoliberal emerging New Public Management practices (Selwyn, 2013). According to McGuire (2022, p. 236) “Thatcher’s neoliberal approach to education replaced the previously dominant social model.” Market logic “soon became the ‘gold standard’ model for national education reforms

and laid a foundation for educational change in the 21st century” (Sahlberg, 2023, p. 3). This foundation included a focus on competition between schools, efficiencies, parental/consumer choice, standardisation, privatisation, and high-stakes test-based accountability as drivers in policies for improving education for all.

Education reforms over the past decades that have reflected those initiated by ERA particularly in Australia, Chile, England, Sweden and the United States as examples, have exposed shortcomings of neoliberal and market-based approaches to education reform. These shortcomings include but are not limited to: harming public education for all by narrowing the scope and purpose of learning, unequal school choice, amplified segregation, devaluing teachers’ professional judgement, stifling creativity and innovation, enlarging workloads, disengaging some students while excluding others, and performativity, amongst others. Connell (2012, p. 681) argues the neoliberal approach has brought “new forms of inequality based on market mechanisms.” Beckert (2020, p. 320) explains neoliberalism as “the most important imaginary dominating political discourse during the past four decades that provided promissory legitimacy to political authority” with its promises of economic prosperity and greater equality and equity having not been actualised. Indeed, there is lacking research evidence to suggest neoliberal based education reforms have improved equity or quality in education systems.

Equitable futures

Based on observation about what approaches seem to work and not work regarding education reform, Fullan suggests right and wrong drivers for education reform. Wrong drivers, which Fullan refers to as the “‘bloodless paradigm,’ lacking care, empathy and civic awareness” are: academic obsession, machine intelligence, austerity and fragmentation (2021, p.5). Right drivers for education system reform, or the ‘human paradigm’ are: wellbeing and learning,

social intelligence, equality investments and systemness (2021, p. 5). As Sahlberg (2023, p. 1) suggests “the success of whole-system educational change depends on national policymakers’ understanding of the difference between wrong and right drivers in planned education reforms for social and economic development of their countries.”

Others have observed drivers that are more aligned with right drivers as suggested by Fullan to have more positive effects on education outcomes for all (Adamson et al., 2016; Chapman & Ainscow, 2021; Hopkins, 2013; Kitsing et al., 2016; Ng, 2017). Particularly as reignited by the COVID-19 pandemic coupled with trends showing general declining outcomes in children’s’ health, learning and wellbeing; some education systems are adopting approaches for education improvement and reforms that include: a stronger focus on equity, a whole child approach to education, valuing teaching as a profession, collaboration, more time for play, flexibility, design thinking, systems thinking, an emphasis on wellbeing and flourishing, new metrics for success and accountability, fair investment and distribution of resources, trust, teacher and student agency/voice, creativity, diversity, inclusion, engaging parents/carers and the community, and learning to learn and navigate uncertainty.

For example, the Welsh Government, in part via its curriculum, is elevating its focus on health and wellbeing for education system improvement (Education Wales, 2020). Welsh schools are also being encouraged to act like “learning organisations” (Harris et al., 2022). Wellbeing, equity, and learner agency are priorities in the recent public education strategy in South Australia (Government of South Australia, n.d.). The Portuguese education system is emphasising inclusion and collaboration as features of education reforms (Ainscow, 2022). The state of California in the U.S. is supporting a whole-child approach to education as well as “systemness” (Fullan, 2025; Furger et al., 2019). This all suggests inklings or potential of a paradigm shift away from the neoliberal-based ‘gold standard’ in education reform, which many hope will better enhance equity and quality in education for all.

A recent OECD report explicitly notes a “paradigm shift” away from neoliberal-based overall aims for education (e.g. human capital theory) to human flourishing, connecting this shift with “a groundswell of scepticism towards the human capital theory in political and policy-making circles” (Kristjánsson, 2023, p. 8).

Coinciding with that gradual shift is an increasing understanding in the research literature and policy practice of problems arising from simply “borrowing” or “transferring” policies and practices to one system that seem to have worked somewhere else, as translation into and consideration of local context is important (Harris & Jones, 2019). Achieving greater equity requires “understanding how to realize particular values [or outcomes] in particular sites of practice” (Kerr & Ainscow, 2024, p. 105). This thesis research focuses on the particular education systems and contexts in Scotland and South Australia, as they currently strive to reform their systems with a focus on improving equity in education.

Still, despite understandings about education reform approaches and drivers and connections with equity in education, it is still not clear exactly what equity in education means, reinforcing the significance to consider its meaning in this thesis, the structure of which is outlined below.

1.5 Thesis structure

This thesis is structured to respond to the research questions above (in 1.2). It consists of six chapters. This section closes **Chapter 1** of this thesis that introduced this research, including the research aims, questions, and structure.

Chapter 2 outlines the overall approach, methodology, and research design for this thesis. It explains how this thesis includes three publications, with each publication positioned to stand for what in a traditional thesis (not including publications), would be a customary thesis chapter. These publication-based chapters

are Chapters 3, 4, and 5 in this thesis. Chapter 2 also includes methodology information for those journal article chapters where more information is warranted for the thesis.

Chapter 3 serves as a literature review of the global imperative to enhance equity in education systems, responding to the first sub-research question: *how and why has the concept of equity in education evolved to become a key education system policy priority globally?* This chapter is represented by the journal article co-written with my principal PhD supervisor (Pasi Sahlberg), entitled “The evolution of the OECD's position on equity in global education,” published in the *International Journal of Educational Development* in 2025, <https://doi.org/10.1016/j.ijedudev.2025.103241>.

Chapter 4 directly responds to the second sub-research question: *how is equity in education understood and translated into public policies and education reforms by policymakers?* This chapter takes the form of a sole-authored journal article entitled “Policymakers’ conceptions of equity in education in Australia and Scotland” that was submitted to the *Australian Educational Researcher* in 2026 and is currently under review.

Chapter 5 addresses the third and last sub-research question *How are equity-related system level education policies practiced in schools?* via the journal article entitled “Equity in Practice: School leaders’ perspectives in Scotland and South Australia” that I co-wrote with my PhD supervisors (Pasi Sahlberg and Glenn Savage). This article was published in *School Leadership & Management* in 2026, <https://doi.org/10.1080/13632434.2026.2637970>.

Chapter 6 offers a discussion of the thesis, including a synthesis of the overall findings from this research, addressing the overall research question: *How is equity in education understood in education systems?* It also offers a meta-framing emerging from this study and then provides scenarios outlining how equity in education *could* be understood in

education systems. I also present my view on how equity in education *should* be understood in education systems, from my overall analysis and interpretation of the findings, from a policy design point of view. I conclude with an outline of implications of this study for various parties of interest as well as for future research.

Chapter 2. Methodology

2.1 Overview of Chapter 2

Chapter 2 outlines the methodology of this thesis. Methodology shapes the direction of scholarly research, “providing the philosophical base or frame of reference for approaching research” (Creswell & Miller, 1997, p. 33). Several approaches and theoretical frameworks influenced the methodological decisions and design for this thesis research, including case studies, qualitative research, and an interpretive approach, as relayed below.

Additionally, this chapter outlines the three studies of this thesis that correspond with the three publications included as part of this thesis in relation to the research design, complementing the methodological detail that is contained in the research publications. Finally, the chapter addresses considerations and limitations of this research design. Each methodological element summarised below harmoniously coalesce to address the overall research question.

2.2 Overall approaches for this research

A key frame of reference for this research is the position that strengthening equity can enhance education system quality and excellence, and support the realisation of better and fairer futures for all (e.g. Harris & Jones, 2019; OECD, 2012; Senior & Sahlberg, 2025; Wilkinson & Pickett, 2011; 2018). This notion is explained in more detail in Chapter 3. Additional overarching approaches informing this research are outlined below.

2.2.1 Case studies: Scotland and South Australia

Scotland and South Australia are both currently emphasising what educational equity means as a policy priority and how it could better be addressed in their education systems for system improvement. In fact, equity is currently the primary education focus for education

transformation (equity and excellence for all students) in these systems. For example, equity in education is a main goal in Scotland's *National Improvement Framework*, as well as in the Government of South Australia's Strategy for Public Education. Scotland's National Improvement Plan envisions achieving equity as: "ensuring every child and young person has the same opportunity to succeed" (Scottish Government, 2024, p. 2). Whereas the South Australian strategy for public education describes the equity goal as: "to seek out inequity, eliminate barriers to opportunities and support all students to learn and thrive..." (Government of South Australia Department for Education, n.d., p. 9).

Case study is a commonly used qualitative method in contemporary educational research. Karlson argues that "the mandatory features of the case study are that it should intensively investigate a real-life situation consisting of one or a few cases which should be spatially and temporally bounded and thereby context-dependent" (Karlsson, 2016, p. 1). According to Merriam (2007, p. 41) "a researcher selects a case study design because of the nature of the research problem and the questions being asked." Due to the "real-life" focus on equity in education, as it is in my research, currently in Scotland and South Australia, I utilised a case study approach with the current school education systems in Scotland and South Australia as the two cases selected (Glette & Wiig, 2022). Significantly as well regarding case study selection, the education departments in Scotland and South Australia agreed to be education system case study participants in this research. Their agreement is noteworthy as governments do not always agree to participate in research projects, let alone student led research projects for a thesis.

Stake (1995) puts forth that case studies compel qualitative and interpretive approaches. I expended a qualitative case study approach, which Merriam (2007, p. 29) describes as having the "special features" of "being particularistic, descriptive, and heuristic":

- Particularistic meaning it “focuses on a particular, situation, event, program or phenomenon.”
- Descriptive in that “the end product of a case study is a rich ‘thick’ description of the phenomenon under study.”
- And heuristic to mean that “case studies illuminate the reader’s understanding of the phenomenon under study.”

There were different methodological considerations during the research design for this research. I could have chosen to focus on one system, for example South Australia, where I live and work. But two case studies, I thought, provide richer data for findings and insights in relation to my research questions. We also wondered whether a multi-case study that would have had three or more jurisdictions would have enriched the findings. I concluded that more than two case studies would likely provide even more insights, two is sufficient and more feasible for the aims and scope of this thesis.

A limitation of the case study approach is that the insights and findings gleaned are partial to the cases studied. Harland (2014, p. 1116) notes, however, that cases can “provide an opportunity for generalization.” Gerring and Cojocaru (2016, p. 394) push that idea further by stating that a case study “promises to shed light on a larger population of cases” with Eisenhardt and Graebner (2007, p.25) putting forth that from case studies one can “create theoretical constructs, propositions, and/or midrange theory.” Hence, conclusions in Chapter 6 are specific to the cases studied and suggest implications for other systems (particularly wealthier OECD nations/jurisdictions). More details about the education systems in Scotland and South Australia and their role as case study participants in this research are included in Chapters 4 and 5.

Next, I expand on the qualitative research approach.

2.2.2 Qualitative research

Qualitative research is based on the premise that the contextual meanings we make of socially constructed, and often complex, phenomena, are important. According to Stewart-Withers and colleagues (2014, p. 60) qualitative research asks “‘what is this?’ and ‘what is happening here?’ In asking these questions it seeks to better understand an issue or gain new insights into an already well-known problem.” As Merriam and Tisdell (2015, p. 243) explain, in qualitative research:

what is being investigated are people’s constructions of reality—how they understand the world. And just as there will be multiple accounts of eyewitnesses to a crime, so too there will be multiple constructions of how people have experienced a particular phenomenon, how they have made meaning of their lives, or how they have come to understand certain processes.

To gain that kind of understanding, a qualitative researcher studies phenomena in their natural settings (Denzin & Lincoln, 2003), while acknowledging and attempting to mitigate as much as possible the “observer effect” (Bogdan, 1997, p. 35). As Aspers and Corte (2019, p. 147) describe qualitative research involves:

...the collection and use of a variety of empirical materials and approaches. It focuses not only on the objective nature of behavior but also on its subjective meanings: individuals’ own accounts of their attitudes, motivations, behavior, events and situations – what people say and do in specific places and institutions in social and temporal contexts. For this reason, following Weber, it can be described as an “interpretative science.”

As outlined in more detail below, the qualitative data collection methods I utilised for this thesis included document analysis, questionnaires, workshops, focus groups and semi-structured interviews.

Since qualitative research is based on the researchers' subjective interpretations, it is paramount for qualitative researchers to strive to continuously reflect on and assess personal biases and motivations for choices made throughout the research process (Bogdan, 1997, p. 34). I strived to continually check-in with my own subjectivity throughout the development and finalisation of this thesis work. Still, personal bias can only ever be limited, not entirely eliminated (Bogdan, 1997), which is a basic premise of an interpretive approach, as outlined next.

2.2.3 Interpretive

Interpretivism stems from the ontological position of relativism. Relativism views reality as subjective, differing from person to person. This approach contrasts with a positivist attitude that assumes an objective reality. An interpretive approach focuses on contextualised meaning-making, acknowledging that the researchers' examination is subjective (Yanow & Schwartz-Shea, 2015).

An interpretivist researcher understands individuals “as exerting agency and constructing meanings in different ways” that are “always connected to broader *webs of meaning* that infuse the policy worlds they inhabit” (Savage, 2021, p. 16). As such, an interpretive approach considers the historical and cultural contexts that people and documents occupy. “The work of the interpretive researcher is to synthesize and formulate ‘our own constructions of other people’s constructions’ in ways we feel accurately account for (and provide convincing explanations about) the phenomena under investigation” (Savage, 2021, p. 16). The interpretive approach can be applied to policy analysis (Yanow, 2007) and qualitative data analysis (Elliot & Timulak, 2005).

2.2.4 A multi-scalar approach

“...policy profoundly shapes our view of the world...”

- Bartlett, L., & Vavrus, 2016

Efforts to advance equity are not simply a matter of policy design, but of how diverse actors understand, interpret, negotiate, and enact reform within complex, multi-level governance contexts. Hamann and Rosen (2011, p.465) anthropologically describe educational policy as:

a form of sociocultural practice that involves efforts by a range of actors with varying degrees of formal role authority to: (1) define what is problematic in education; (2) shape interpretations and means of how problems should be resolved; and (3) determine to what vision of the future change efforts should be directed. This broader conception of policy directs attention to the social and cultural processes of interpretation, contestation, adaptation, compromise, and sometimes resistance that shape all points on what would be conventionally understood as the continuum between policy and practice. It also directs attention to the diversity and inter-connectedness of actors involved in these processes.

Historically, education policy and its actors have been understood primarily through a nation-state lens. Rizvi and Lingard (2010) highlight that globalisation means the global level and therefore global level actors have become increasingly within range of actors “involved” in the process described above. Connecting with the ideas thus far, scholars (e.g. Lingard & Rawolle, 2011; Noyes, 2013; Robertson & Dale, 2017) have stressed that education policy, and thus education reform, is assembled according to its particular context, and that those contexts include complex “multi-scalar dynamics and, as such, needs to be seen as the product of intra-, inter-, and supra-national interactions” (Verger et al., 2023, p. 161). Robertson and Dale (2017) stress that education policy analysis must therefore go beyond “methodological nationalism” to multi-scalar analysis.

A multi-scalar approach to education policy analysis examines how education policy is shaped, interpreted, and enacted across multiple levels (or scales) of governance and social

interaction, rather than treating the nation-state as the primary or sole unit of analysis. As Glick-Schiller (2015, p. 2278) relays, a multi-scalar perspective:

calls on scholars and policymakers to acknowledge that each state around the world represents the coming together within place and time of the multiple intersecting array of networks that can be analyzed as transnational social fields.

From a research perspective, these intersecting networks or scales can be examined in different ways. For example, an analysis of the “local, regional, national and international” (Lan, 2014) or different scales within the sub-national level (Mueller & Brooks, 2020). It is worth pointing out that the multi-scalar approach is connected to a family of ideas that span across human development, policy design and social justice theories: the rejection of a single-metric or single-cause explanations, in favour of plural, interacting, equally valued influences.

Some related key theories, approaches, and frameworks embraced in that family of ideas include: the capabilities approach (Sen, 1999), ecological systems theory (Bronfenbrenner, 1994), life course theory, intersectionality (Crenshaw, 2013), social determinants of health, Nancy Fraser’s multiple dimensions of social justice, complex adaptive systems theory, policy ecology or a whole-of-systems approach, co-production and participatory governance, and funds of knowledge/identity (Esteban-Guitart & Moll, 2014). Across these ideas some overarching thematic threads are:

- anti-reductionism (no single metric or cause),
- plural valuation (multiple dimensions matter in their own right),
- interaction effects (factors compound, not just add), and
- normative commitments (what we value shapes what we measure and design).

Despite the now readily acknowledged multi-scalar nature of education policy design and enactment, many studies that focus on how equity in education is understood and

addressed use a single lens, for example, theoretically (Sahlberg & Cobbold, 2021), between schools (Savage, 2013), or at the system level (Senior, 2021). This research design is distinctive in examining how equity is understood and addressed across global, system, and school levels within a single study, thus attending to the multi-scalar nature of education policy design and enactment. As such, the research design includes three studies, each focusing on one particular “scale” that when combined, follow a multi-scalar approach to address my overall research question.

It is worth noting that I could have chosen different or additional scales to consider for this thesis, the classroom or the Federal level in Australia, as examples. I chose to focus this thesis on the three scales: the global, system, and school levels because they are the three scales that I considered would be the most productive scales to focus on to answer my research question(s) for the purpose of this thesis.

The approaches outlined above informed the research design for my thesis, which is next explained in more detail.

2.3 Research design

The research design is organised according to a multi-scalar approach into three distinct and interdependent studies. Each study focuses on one scale to better examine how equity in education is understood in South Australia and Scotland. Each study also addresses one of the sub-research questions:

Study 1: *How and why has the concept of equity in education evolved to become a key education system policy priority globally?*

Study 2: *How is equity in education understood and translated into public policies and education reforms by policymakers?*

Study 3: *How are equity-related system level education policies practiced in schools?*

Collective findings from the three studies address the overall research question: *How is equity in education understood in education systems?* The chart below depicts the three studies.

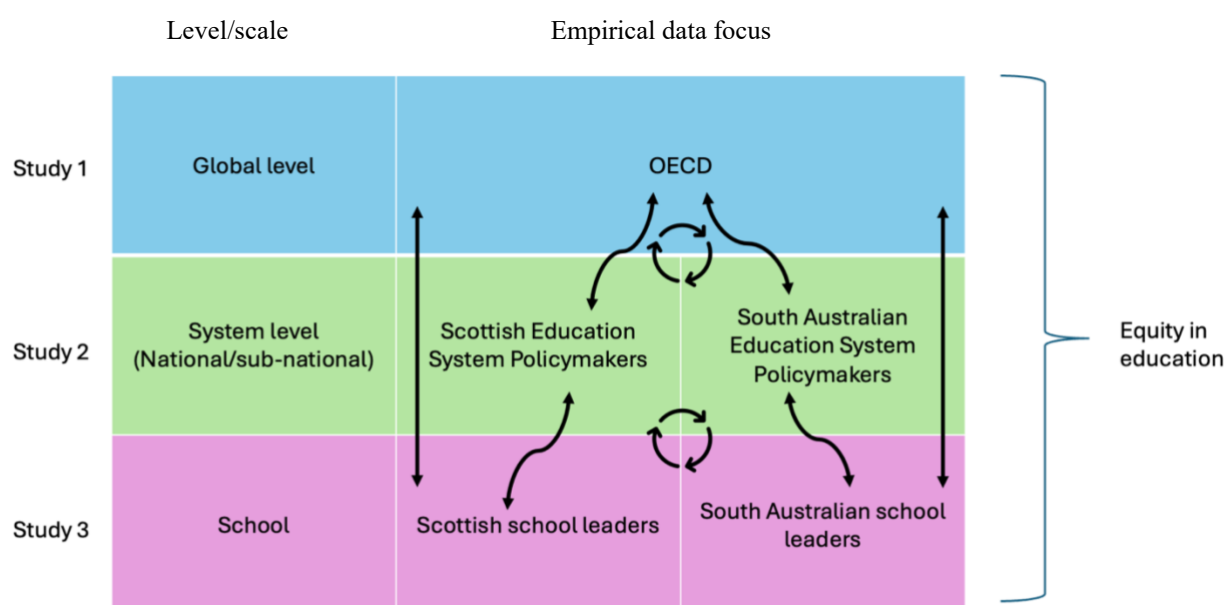


Chart 1. *Three studies included in this thesis*

A fundamental condition for this research design was to obtain approval from both the Scottish and South Australian Governments to be participants in this research. Approval was received from both governments in 2024. Soon after, the Human Research Ethics Committee at the University of Melbourne granted approval for the data collection for Studies 2 and 3. More detail including the design of each study is provided next.

It is worth reiterating here that because this is *a thesis with publications*, each study is reported in an individual journal article that are published or submitted to be published in

highly regarded education journals (including two Q1 journals). These journal articles are included as Chapters 3-5, with Chapter 3 = the journal article for Study 1, Chapter 4 = the journal article for Study 2, and Chapter 5 = the journal article for Study 3.

2.3.1 Study 1: Equity in global education policies

With globalisation and the expansion of international organisations, the global level has come to occupy an increasingly prominent role in shaping education policy and practice.

Institutions such as the United Nations, UNICEF, the World Bank, the OECD, and the World Health Organization can play significant roles in framing priorities, generating data, and influencing national reform agendas.

This first study examines the global level to explore how and why equity has emerged as a policy priority across education systems globally, answering research sub-question:

How and why has the concept of equity in education evolved to become a key education system policy priority around the world?

As Berten and Leisering (2017, p. 152) observe “since the 1990s, social policy has increasingly gone global.” Additionally, there is much research literature indicating the influence of international organisations like the OECD on global education policy governance (e.g. Ball, 2003; Leibfried et. al., 2007; Resnik, 2006; Rizvi & Lingard, 2010; Sellar & Lingard, 2013; Zapp, 2021). I knew that equity in education is increasingly becoming a policy priority in education systems around the world, but I did not know exactly why. If I could better understand why, then my intention was to also be able to examine how (based on the why) equity in education was understood from the perspective of the “why”.

For Study 1, I chronologically synthesised documents, policy reviews, and research literature in relation to how and why the concept of equity in education has evolved to become a key education system policy priority around the world. From reading and analysis

it became clear that there has been great influence from the OECD regarding that question. For example, according to Sahlberg (2023, p. 2) “the results of the first [OECD] PISA study in 2000 launched a new era in international comparative education.” Other scholars, for example Rizvi and Lingard (2010, p. 18), also highlight the global policy influence of PISA.

But I also discovered that there is wanting systematic analysis of why and how the OECD became to be in a leading and championing role when it comes to equity in education. And, since it does have influence globally on education systems regarding equity in education, how has and does the OECD consider equity in education? In this study, I was able to identify when in education policies globally equity appeared as a mainstream narrative and suggest why this shift occurred.

Study 1 is significant because there is very little research available that would help to understand at the global policy making level where the OECD’s equity interest and work come from, hence, it supports the global dialogue to help consider the OECD and equity in ways that have not been considered. In line with my research design, the purpose of this study is also to inform and contextualise the next two studies. It’s also worth noting that as my thesis’s case studies reflect two wealthier OECD nations (UK and Australia), the OECD is highly relevant in examining the global level regarding equity in education in these places. (Whereas if I was examining a non-OECD education system/nation, I might have also or instead focused this study of the global level on the World Bank and/or UNESCO.)

2.3.2. Study 2: System level equity-related education policies

The second study shifts the focus from the global to the education system level, examining the national context in Scotland and the sub-national (state) context in South Australia. This study was designed to answer the research sub-question:

How is equity in education understood and translated into public policies and education reforms by policymakers?

The formation of public policy goals, like equity in education, as well as the public policies and education reforms employed to realise them, are contingent upon multifaceted contextual factors rather than arising spontaneously or in isolation. The complex interplays concerning who, what, where, when, why and how public policies emerge have been examined in evolving ways over the past decades, often connected to a concept of policy design (Howlett, 2014; Howlett et al., 2015; May, 2012). Skedsmo (2011, p. 7) points out policy design factors “depend on how the aims and purposes ascribed...and the meanings and representations they carry, are perceived, understood and responded to by key actors.”

At the same time, policymakers can have unclear understandings of policy aims that can lead to “harmful and other unintended consequences” (Oliver et al., 2019, p. 1) including unclear or ambiguous policy goals. As Fowler (2023, p. 1394) explains, regarding policy ambiguity:

Generally speaking, ambiguity exists where a phenomenon [like equity or inequity in education] can be thought of in more than one way, so that two or more reasonable people may come to differing conclusions about the meaning. In the context of policy, ambiguities occur where policy statements may be interpreted differently by groups with alternative perspectives, leading to conflict and confusion over the intents and purpose of said policy and how it may manifest in any specific instance.

Due to the importance of policymakers’ conceptions, this study focuses on policymakers’ own understandings, opinions and ideas regarding equity in education and related policy, practice, and reform ideas. As such, current senior level education policymakers at the system level in Scotland and South Australia were purposefully selected as participants for this study. A liaison person assigned from the Scottish and South

Australian governments assisted with the purposeful selection of participants. I sent recruitment emails to ten policymakers in Scotland and eight in South Australia.

I sent recruitment emails only to ten policymakers in Scotland and eight in South Australia because this was the maximum option available for senior policymakers that had decision-making power in each location, as recommended by the designated liaison person from each government. I could have increased recruitment possibilities by branching out to middle level managers, but in line with the objectives and questions in this thesis, I wanted to target the most senior level policymakers possible who would be in decision making positions. In the end, five Scottish policymakers and five South Australian policymakers participated (10 total). Due to limited maximum senior policymaker participant options and due to policymakers' busy schedules, having five participants from each location was appreciated and adequate.

I first considered a policy Delphi method for data collection for this study (Turoff, 2002). However, as the study planning progressed, it became clear that, although the Delphi method is "inherently flexible" (de Loë, 2016, p. 78), trying to make the Delphi method work was not necessary. For the scope and purpose of this study, it appeared more suitable to utilise methods that can be included in a Delphi method (a questionnaire and workshop), but not in a way that necessitates a policy Delphi. The Delphi method utilises iterative questionnaires, and the use of a questionnaire still held as a relevant foundational data collection method, particularly for a group of busy policymakers. A benefit of this method is that it does not require participants to respond to questions at the same time or at a particular time.

The questionnaire consisted of 17 questions and was designed so that it would not take longer than 30 minutes to complete. The questionnaire questions focused on policymakers' understanding of equity in education, and related policies and practices in their

system. Open-ended questions and multiple-choice questions were utilised. I used Qualtrics to design and distribute the questionnaire. I piloted the questionnaire with a relevant individual in South Australia and Scotland before sending it to the policymaker participants in mid-2024. The questionnaire used is included in the appendix (Appendix A).

In addition to the questionnaire, I organised and ran in-person workshops in Scotland and South Australia with policymaker participants on equity in education. The Scottish workshop took place in a government building in Edinburgh in September 2024. The South Australian workshop took place in a government building in Adelaide in October 2024. Workshops are regularly used as a qualitative research method and can help the researcher build a sense of trust, engagement and collaboration with participants (Ahmed & Asraf, 2018). The workshops lasted approximately 1.5 hours. I first presented some overall findings from the questionnaires in both workshops to kick-off discussion around understandings and policies regarding equity in education, including ideas on how equity in education could be better understood and addressed in the future. I audio-recorded the workshop using Zoom, with participant permission. I developed and used a workshop guide to steer the session. The workshop guide used is included in the appendix, Appendix B.

Workshops might connote ideas of participants coming together under the auspices of a leader/facilitator to generate some kind of consensus, policy development or ideas for next steps toward some action. This workshop's purpose was to promote thinking and discussion about ideas, policies and related practices regarding equity in education. Time to reflect on these issues in such a way was something some policymakers seemed to appreciate. For example, after the workshop, one policymaker told me "the workshop a good opportunity to talk through these things." The data analysis and findings for this study are included as part of the corresponding journal article for this study, as Chapter 4.

2.3.3 Study 3: Equity in practice at the school level

The third study moves to the school level, where education policy is ultimately interpreted, negotiated, and put into practice. It addresses the research sub-question:

How are system level equity-related education policies practiced in schools?

Study 3 examines the school level to better understand how system level equity-related education policies are understood in schools, the level where policy rubber meets the school road; described in research literature as policy enactment. Policy enactment and related literature often describe a “gap” between “policy rhetoric” and school “reality” (e.g. Burgess & Lowe, 2022; Ng, 2008). Amongst other ideas for addressing that “gap” is the idea of more “coherence” between the levels within an education system (e.g. Quinn & Fullan, 2017). Another bedrock of policy enactment is that different contexts render different enactments, implying that the extent or type of “gap” between policy rhetoric and school practice might also differ in accordance with different school contexts.

Since system level “policy rhetoric” regarding equity in education is often unclear, it was going to be particularly interesting to see how unclear system level equity aims and related policies were practiced in schools. In addition to this study, I found little other studies specifically focused on how the school level understands and enacts equity-related education policies, let alone what that might look like in practice (though some do exist, e.g. Roegman et al., 2021 and as referenced in Chapter 5). For this study, I wanted to examine how system level equity-related education policies were practiced in schools in Scotland and South Australia.

To represent the school level and since school leadership has been found to impact equity and quality of school outcomes (Cruickshank, 2017; Liu, 2025), I chose to run focus groups (Wilson, 1997) with purposefully selected school leaders (headteachers/principals) in Scotland and South Australia. A focus group “encourages group interaction, covers topics

quickly, stimulates multiple responses and gathers opinions at one time” (Vamos & Zhao, 2009, p.198). In a focus group setting “the researcher facilitates or moderates a group discussion between participants and not between the researcher and the participants” (Nyumba, 2018, p. 21).

Focus group participants were purposefully selected with assistance from relevant academics, school and system leaders, and government employees. As Patton (2002, p. 230) describes:

The logic and power of purposeful sampling lie in selecting information-rich cases for study in depth. Information-rich cases are those from which one can learn a great deal about issues of central importance to the purpose of the inquiry, thus the term purposeful sampling. Studying information-rich cases yields insights and in-depth understanding rather than empirical generalizations.

I targeted extremely experienced school leaders with deep knowledge regarding the school and education system level to be focus group participants to enable information rich and expert data to be collected. I initially intended for there to be around 3-4 participants in each focus group, to be adequate for “information richness” (Guetterman, 2015, p. 3) with three focus groups in each system to provide adequate qualitative data (Hennink et al., 2019). I only recruited participants from public schools, making sure to have representative school leaders from primary, secondary, comprehensive, more urban-based, and more rural-based schools.

I emailed potential participants to ask if they would be willing to take part in one focus group with two other school leaders in their system lasting approximately 1-1.5 hours in 2024 and 2025. At first, I thought it would be preferable to run the focus groups in person, but after considering the availability and locations of the school leaders who agreed to participate, it became evident that for ease and time considerations for all, virtual focus

groups were the better choice. I ran the focus groups on either Teams or Zoom, due to participants' preference.

In the end, I was able to run two focus groups with three participants in South Australia and in Scotland. Due to the nature of the role of a school leader, for the third focus groups in each location, one school leader was unable to join last minute, so there are two focus groups of three participants and one of two participants in each location. To buoy the qualitative data for this study, and to better align with school leader availability, I conducted semi-structured interviews with school leaders in each location as well, with three participants each in South Australia and Scotland.¹ In total, in each system, I collected data from 11 school leaders (22 total) via a mixture of focus groups and semi-structured interviews.

Each focus group and semi-structured interview lasted around one hour to allow the experts enough space and time for discussion, while also not taking up too much of their time. As I did for the data collection during the workshop with the policymakers, I developed an interview guide as a tool for data collection from the school leaders. The interview guide used is in the appendix (Appendix C). I moderated the focus groups and semi-structured interviews around the following topics:

- What is equity in education?
- How is equity in education linked to or affecting the way the school principals think about their leadership work?
- How are equity-related education policies (system level and school level) practiced in schools?

¹ I received approval to amend my original University of Melbourne Human Research Ethics application to include semi-structured interviews as a data collection method.

- Can principals make effective changes at the school level? If so, how do these effective equity related changes relate to system level initiatives?
- How do you think equity in your school or all schools could improve in the future?

The data analysis and findings for this study are described as part of the corresponding journal article for this study, as Chapter 5.

2.3.4 Ethics

University and government ethics requirements and procedures were adhered to for this thesis. Human Ethics approval was received on 1 May 2024 from the University of Melbourne (application reference number: 2024-28151-52665-4). Governmental support for this project was received from Scotland in June 2024. Approval for conducting research with South Australian department staff was received by the Department for Education in South Australia on 24 May 2024 (research application: 2023-0055).

2.4 Considerations, limitations, issues of reliability, and validity

Inequity, education systems, policy, and school practice are all highly complex interconnected areas affected by a myriad of other factors. A comprehensive examination of these issues would require a substantially broader qualitative scope, complementary quantitative approaches, and longitudinal data collection across multiple contexts. Such an approach is beyond what is practically achievable within the scope and timeframe of a doctoral thesis. Accordingly, this study necessarily adopts a more focused analytical lens, which constitutes a limitation of scope but reflects pragmatic methodological decisions aligned with the constraints of PhD research.

As with all qualitative research, the findings of this thesis are situated within a specific social, political, and temporal context. They are therefore “dependent on a specific social context in time and place” (Harland, 2014, p. 1116) and shaped by my subjective interpretations. While the thesis offers informed insights, any generalisations beyond the contexts examined should be made with caution, as findings may not be directly transferable to other education systems or policy environments.

The deliberately small sample sizes used in this research also represent a limitation. While the qualitative design prioritised depth of insight over breadth, the relatively small number of participants means that the perspectives captured cannot be assumed to represent the full diversity of views within the relevant education systems. In addition, some of the policy issues discussed in this research may be considered politically sensitive, which may have shaped the willingness of participants to share particular perspectives.

An additional limitation relates to participant responses. Policymaker and school leader participants may have exercised restraint in their contributions due to personal, political, or career considerations. Such dynamics are inherent in research involving individuals in positions of authority and may have influenced the depth or openness of some accounts. Data collection in Scotland was also constrained by time, as the research visit was limited to a single period in which interviews and other data gathering needed to be conducted within a relatively short timeframe.

It may also have strengthened the study to share and discuss emerging findings with senior policymakers in both South Australia and Scotland as a form of validation. However, as both jurisdictions were entering busy political election periods during the final stages of this research, opportunities to undertake such

engagement were not feasible. Nevertheless, the themes identified in proceeding chapters of this thesis are broadly consistent with existing research literature, lending support to the credibility and reliability of the findings.

Chapter 3. The evolution of the OECD's position on equity in global education

This chapter is presented as the author-accepted manuscript of a peer-reviewed article published in the *International Journal of Educational Development* (Volume 114, April 2025, 103241), <https://doi.org/10.1016/j.ijedudev.2025.103241>.

3.1 Highlights

- The OECD's stance on equity in global education has changed over recent decades from looking at equality of inputs to focusing more on equity of outcomes.
- The OECD's global work on equity in education has gone through three periods of progression from 2000 to present.
- The OECD's evolving focus on equity in education is a reason why education systems around the world are including equity as a priority policy aim.
- Clearer definitions of equity in education might lead to changes that would support educational inequities to be better addressed in the future.

3.2 Abstract

This article explores the role the Organisation for Economic Cooperation and Development (OECD) plays on national education policy and how it emerged to become a global champion of equity in education. Two overarching conclusions made in this article are that (1) the OECD's position on equity in education has changed over the past three decades and that (2) the OECD's evolving focus on equity in education is a reason why education systems around the world are including equity as a priority policy aim. It has remained largely unexplained why despite the OECD promoting equity as a key priority for national

education policies for over two decades with influence on policy discourse around the world, equity of education outcomes has not generally improved globally. Many policymakers today wonder why equity policies so often fail. The premise of this article is that better understanding of the OECD's role in advocating equity in global education could be helpful in efforts to advance equity in national education policies and reforms.

3.3 Introduction

Accelerating climate change, escalating wars and violence, artificial intelligence (AI), intensifying global migration, and rising income inequality are causing economic instability, political turbulence and social disruption around the world. Education systems are called on to rescue as many believe they are best positioned to generate positive change and life outcomes for all individuals and societies, or when other available options have been exhausted or ignored. However, learning and wellbeing outcomes of education systems, as well as students' sense of belonging at school, have been declining for the past two decades (OECD, 2019a, World Bank, 2018). Moreover, students' socioeconomic background continues to be a far more important factor influencing education systems' performance than people commonly think (OECD, 2023a, OECD, 2023b, Sahlberg, 2023). Inertia in educational change is in part because, as Chapman and Donaldson (2023, p. 3) observe, "of all public services, it has been claimed that education systems are the toughest to reform." Indeed, how to improve education systems so that all children are fairly set up for success remains a consistent global challenge and wicked problem for policy and practice.

Aspiring to address that challenge over the past couple of decades, equity and excellence have increasingly become common overarching priorities in government reforms and strategies aiming to improve education around the world (Harris and Jones, 2019). Since the 1990s the Organisation for Economic Cooperation and Development (OECD) has become

a global authority in influencing education policies and reforms, especially in high-income countries but more recently also beyond. As an influential economic collective of the wealthiest countries, the OECD has against all odds become a champion of equity in its advisory to governments regarding social policies.

This article explores the OECD's position on equity in education and how it emerged in its present form over time. Equity and equality of educational opportunity has traditionally belonged to the core of work of the United Nations Educational, Scientific and Cultural Organization (UNESCO) and the World Bank (Elfert and Ydesen, 2023, p. 2; Heyneman, 2003). We assume that equity has become an education system policy priority in most OECD countries because the OECD's policy advice to governments has stressed the importance of equity in building higher performing education systems. According to Seitzer (2023, p. 278) "a bird's-eye view of education policy in general reveals that policies are diffusing and education systems all around the globe are becoming increasingly similar, mostly aligning with OECD standards." Still, how different systems translate such standards and assemble policy striving for OECD alignment will differ according to their specific contexts (Auld and Morris, 2021, Baird et al., 2016, Chin et al., 2024, Yoon, 2024). This article intends to provide deeper understanding of what these OECD standards and standpoint have evolved to be particularly regarding equity in education. Better understanding of the role of the OECD could help education systems make more informed decisions regarding both policy and practice as they strive to improve via enhanced equity.

Next, we provide a chronological exploration of the OECD's position on equity in education, focusing on the period from the first Programme for International Student Assessment (PISA) in 2000 to the present. We lead into that exploration with a broad historical overview of trends and thinking that led to the inception of PISA, and then provide

a chronological illustrative account of the OECD's evolution regarding its position on equity in education, suggesting three main periods of progression.

3.4 From equality of opportunity to equity of outcomes in education

The principle that it is important for nations to strive to ensure that *all* children benefit from a quality school education is a relatively recent phenomenon. Historically, the provision of education was left up to what individual families could afford and access and was therefore highly unequal according to a child's family background. The establishment of public education systems to provide free or affordable education to all children emerged from various societal, economic, and political factors. Largely, industrial revolutions brought about significant changes to economies and societies, increasing the demand for skilled labour and literacy. Governments recognised the importance of an educated workforce for economic development and competitiveness in the increasingly global market, leading to their investments in public education. However, educational access was often unequal, with significant disparities based on race, gender, and socioeconomic status, amongst other factors.

After World War II, many countries needed to rebuild and the Cold War period made “economic progress” a “global security issue” (Gorur, 2024, p. 15). Human capital began to be viewed as a main contributor to national income growth in the 1960s (Heyneman, 2003). A general position became that “education and training are the most important investments in human capital” (Becker, 1994, p. 17). Therefore, investing in education for more people would equate with greater human capital and, in turn, greater economic growth. As Biesta (2022) notes, this approach to education connects it considerably with economic purposes like productivity and employability.

Promoting social cohesion through democratic ideals via school education was also a goal for Western democracies post WW-II (Steil, 2018). Coincidentally, there were strong social justice and civil rights movements advocating for equal rights, equal treatment and equal opportunities for all. This was because there were evident legal inequalities and unequal treatment of certain groups in society based on socioeconomic background characteristics like race and gender stemming from prejudice and systemic injustices.

In part to assess such conditions, Section 402 of the Civil Rights Act of 1964 required that the Commissioner of Education “shall conduct a survey and make a report to the President and the Congress”... “concerning the lack of availability of equal educational opportunities for individuals by reason of race, color, religion, or national origin in public institutions at all levels in the United States” (Civil Rights Act of, 1964, 1964). James Coleman led that task and created one of the largest education (and social sciences) surveys of the time. Rather than only focus on if inputs were equal or fair and how desegregation was progressing, Coleman devised the study to also “identify to what degree those inputs were related to school achievement” (Kantor and Lowe, 2017, p. 571), and to consider more broadly what might have an effect on student achievement. The resulting Coleman Report (1966) was a watershed moment in education. Surprising many, it found (as described by Dickinson, 2016, para. 6):

The physical amenities of a school weren't the most important factor in a child's educational success, and neither was funding, which, it turned out, was relatively equal within regions. Instead, a student's family background, coupled with a diverse socioeconomic mix in the classroom, appeared to be the biggest determinant of how well a child would learn. No one had said this before, backing it up with data. What's more, Coleman was the first to document what came to be known as the achievement

gap—African-American children were several grade levels behind their white counterparts in school.

The Coleman Report sparked widespread debate and further research on whether schools could have a greater impact on education outcomes for all students, fuelling research on school effectiveness and school improvement. Increasing understanding of child development and neuroscience also shifted focus away from some thinking that certain groups of children are just not able to actualise certain opportunities, to the idea that if certain opportunities are continually not taken up by certain groups, (as evident by inequalities in outcomes amongst different student groups) some other approaches might need to be considered, some approaches like equity.

3.4.1 Equity in education

The concept of equity evolved somewhat to differentiate from the idea of equality in education. The notion was that treating all students equally (same inputs, similar opportunities, or fair access) is not always the way to achieve more equal outcomes in an education system. Children are different, with different needs, contexts, desires, motivations, abilities and background contexts that influence their learning experiences in school. Equity is not the same as equality if equality means, for example, “treating everyone the same” (Levinson et al., 2022, p. 1). Equity, like equality in education, is often linked to concepts like social justice, inclusion, and fairness. To that end, what the concept of equity in education often strives to address is lessening the link between children’s socioeconomic background and their education outcomes. Or, as Gutiérrez (2002, p. 153) emphasises, “the goal [of equity is] being unable to predict student patters (e.g. achievement, participation, the ability to critically analyse data or society) based solely on characteristics such as race, class, ethnicity, sex, beliefs, creeds, and proficiency in the dominant language.”

However, there are many different definitions (Appels et al., 2022, Frønes et al., 2020, National Academies of Sciences, Engineering, & Medicine, 2019, Van Damme, 2022, Varsik, 2022). Edgar (2022, p. 16) suggests that a helpful way to think about educational equity is as “a process that is focused on what an individual needs” ... “in other words a proportionate response to individual needs and characteristics.” As Sellar and Lingard point out (2014a, p. 2) “there are many possible policy framings of equity in relation to education and these have changed over time and across contexts.”

Starting around the 1960s, numerous compensatory education programs focused on increasing funding allocated to children from lower socioeconomic backgrounds, more money to better address needs for “underachieving” “disadvantaged” students (e.g. Title 1 in the United States, the Education Priority Area programme in England, and the Disadvantaged Schools Programme in Australia). In the United States, for instance, this approach in education was taken to address poverty as it was more politically agreeable than “income redistribution, public employment, or more direct interventions in the economy” (Kantor and Lowe, 1995, p. 7). This compensatory approach to resourcing is a common way equity in education is considered, particularly at the education system level. Recent studies repeatedly show that increases in inputs like funding have the most impact on student outcomes for more socioeconomically disadvantaged students and schools (Cobbold, 2019a). But *how* resources are used also matters, and even with individualised processes or additional funding support for some students, socioeconomically advantaged students may, and often do, disproportionately continue to achieve higher education outcomes compared to students from less advantaged socioeconomic backgrounds. As Harris and Jones (2020, p. 14) suggest, “challenging inequity” also “necessitates dismantling the structural barriers that serve to exacerbate and perpetuate inequity.”

One other way to consider equity in education is as achieving a relatively equal distribution of education outcomes amongst different social (student or equity) groups with all students reaching an agreed adequate educational threshold (Sahlberg and Cobbold, 2021). What educational outcomes to consider in such a definition is a key question, as well as what drivers, policies, and practices would facilitate achieving such outcomes in an entire education system.

3.5 The rise of the OECD as the global education policy authority

Globalisation that was facilitated by international organisations, such as the World Bank, the OECD and UNESCO, further harmonised education policies across the world in the 21st century. Many nations and their policymakers wanted to know how their students performed compared to one another. Additionally, if there was a way to know if one system was performing “better” or “worse” than another in terms of better preparing future generations efficiently for optimised economic productivity, how and why that was the case was another aspect that was of interest to leaders and policymakers. Nations, policymakers and leaders desired an international perspective in which to situate themselves, to look to for advice, to know how well their education systems were providing quality education to all students and if not how to help think of ways of how they could do better. International large-scale assessments (ILSAs) became one direction nations, economies and systems began to look for answers (Addey and Sellar, 2020).

As Elfert and Ydesen (2023, p. 2) describe “...in the first two decades after World War II, global education was the domain of UNESCO...”. UNESCO was founded in 1945 to “contribute to peace and security by promoting collaboration among nations through education, science and culture” (UNESCO Constitution, Article 1). As Elfert observes (2015, p. 1) “since its inception, UNESCO has promoted a view of education as a human right,” an

approach particularly contested “following the rise of neoliberalism.” As explained by Husén and Postlethwaite (1996, pp. 129–130), following WWII and UNESCO’s founding:

...sweeping generalisations were being made about the relative merits of various national systems of education... The American concerns were heightened by the launching of Sputnik (in 1957) by the Soviet Union and it was feared that the US was lagging behind and that much of this was due to poor mathematics and science education in the secondary schools. As secondary education was becoming universal in European countries there was also concern in that part of the world about educational standards.

Consequently, UNESCO was tasked with helping set common education definitions and standards, as well as analysing and comparing such standards amongst its member countries (Heyneman, 1999). However, UNESCO’s member countries were ever-expanding (from around 50 at its founding to around 100 by 1960 to currently 194) and agreement, data availability, reliability, measurement, and management became unmanageable and problematic by the 1980s (Heyneman, 1999, Mundy, 1999). Even “UNESCO was itself uncomfortable with the quality of its statistics” (Robertson, 2022, p. 196). The United States, the United Kingdom and Singapore withdrew from UNESCO in the mid-1980s, which meant less funding for the organisation (Mundy, 1999, p. 29). Meanwhile, the OECD had been working on developing international education indicators. As Robertson (2022, p. 194) explains:

For its part, the OECD continued to expand its use of statistics and indicators, at the same time launching a critique of UNESCO’s use of statistics. In doing so, the OECD created the conditions for its dominance of the collection and use of statistics to govern national education systems, in turn establishing an emerging hegemony over the transnational governance of national education systems.

By the 1990s, OECD member countries (particularly the United States) “were demanding regular and reliable data on the comparative performance of their education systems, and the education work of the OECD evolved in response” (Sellar and Lingard, 2013, p. 190). That evolution of education work largely connotes PISA. The Programme for International Student Assessment (PISA) was developed to assess how prepared students are for effective functioning in everyday life and for a productive future adult life.¹ The OECD associates such preparedness with the reading, math and science “literacies” assessed by PISA, domains that were “seen to be strongly linked with economic development” (National Research Council, 1995, p. 106).

PISA is a sample-based assessment of 15-year-olds conducted every three years² since its start in 2000 in participating countries with “an assumption that young people’s test scores reflect their future capacities to compete in global markets” (Savage and O’Connor, 2014, p. 610). Assessing 15-year-olds was chosen for PISA as this was the general last year of compulsory schooling in OECD member countries. The last year was the focus because, according to the OECD this would provide “a significant indication of the overall performance of school systems” (OECD, 2009, p. 78). As noted by Yliniva et al. (2024, p. 4):

As an economic organisation whose overall goal is to advance the economies of its member states, much of the OECD’s educational policy work is informed by theoretical frameworks supporting human capital formation and coherence between education and the labour market.

Many critiques of the OECD involve its human capital and neoliberal approach to education. Thompson et al. (2022, p. 698) even refer to these critiques as “the neoliberal fetishisation of the OECD in education studies.”

Due to knowledge about the link between student background characteristics and their educational outcomes, PISA included an index of student’s economic, social and cultural

status (ESCS). UNESCO's Education for All initiative and the Salamanca Statement in the 1990s also represented more of a global emphasis on ensuring all children benefited from a good education, regardless of personal background factors, that the OECD would have needed to keep pace within its new assessment.

PISA reports student socioeconomic status or background characteristics using the index of ESCS (economic, social, and cultural status). This index "is probably, just after student achievement scores, the most used variable in reports and in secondary analysis of data from PISA" (Avvisati, 2020, p. 1). ESCS is "a composite measure that combines into a single score the financial, social, cultural and human capital resources available to students" (OECD, 2019b, p. 50). This measure is "derived from three variables related to family background: parents' highest level of education (PARED [or PAREDINT]), parents' highest occupational status (HISEI), and home possessions (HOMEPOS – a proxy measure for family wealth), including books in the home" (OECD, 2019a, p. 216). PISA considers students socioeconomically advantaged if they are among the 25 % of students with the highest ESCS values and socioeconomically disadvantaged if the ESCS index is among the bottom 25 % within their economy (OECD, 2023b).

ESCS is constructed from student self-reported information (a questionnaire that is estimated to take around 30 minutes to complete). The OECD claims that the data from both student tests and background information self-reports are as good as they can be and therefore worthy of trust to be used in broader analysis and conclusions. Not everybody agrees with this view (e.g. Sjøberg, 2020). Bray and Kobakhidze (2014), for example, suggest that there is potential disengagement with the student background questionnaire and Cobbold (2019b) reminds us that there are issues around students' lack of effort on PISA assessments. Avvisati (2020) provides a detailed overview of some considerations around creating a more stable measure of ESCS, some of which have already been adopted by the

OECD. As Komatsu and Rappleye recommend (2021, p. 250) PISA “data cannot simply be believed, but nor can the data simply be dismissed.”

PISA compares a student’s ESCS with their results on the three knowledge domains, (reading, mathematical and scientific literacy) and additional PISA domains that have been included in some years (e.g. problem solving, financial literacy, global competency, creativity). PISA considers systems to be more equitable if there is less of a relationship between ESCS and achievement on PISA and less equitable if there is more of a connection between ESCS and PISA achievement. As Sellar and Lingard point out (2014a, p. 6), PISA marked a “...critical juncture, particularly in relation to the measurement of equity in education.”

3.6 The OECD’s evolving approach to equity in education in the 21st century

According to Popkewitz et al. (2018, p. 108), “the OECD and PISA operate through benchmarks and ‘empirical evidence’ that ‘are assembled and connected in a particular historical mode of visualizing problems, its notions of methods, and what counts as solutions to social issues.” While there have been critiques of the OECD’s influence on inequity fostering effects and reforms, the OECD has also increasingly (and perhaps also paradoxically) evolved to become a champion of education systems prioritising equity.

The next sections outline a generally chronological illustration of three periods of the OECD’s evolving position regarding equity in education since PISA. This account is not extensive or exhaustive but offers one way to consider the OECD in light of equity in education, according to significant OECD equity-related findings and reports.

3.6.1 Period from 2000 to 2011: high quality and high equity can go hand-in-hand

By the end of the 20th century, equity prominently occupied “official statements meant to guide policy in OECD countries” after a period of equity policies “ebbing and flowing”

(Baker et al., 2002, Healy and Istance, 2001, p. 195). There was largely acceptance that the cost of investing in equity in education outweighs costs of not doing it regarding “higher tax revenues and reduced costs of criminal justice, public health, and public assistance” (Levin, 2009, p. 5). There were, however, still underlying beliefs that there were trade-offs between (investing in) equity (or more equality of outcomes) and the high-quality education outcomes that were desirable to foster economic competitiveness and growth. Some education systems operated with an underlying belief that their educational policies must include some inequality to produce high quality outcomes (Parker et al., 2018). There was also concern that “focusing on the low-achieving students may be at the expense of highly capable students not getting a fair opportunity to succeed” (Frønes et al., 2020, p. 51).

A meeting of OECD Education Ministers in 1997 documented:

clear endorsement that equity, access, and participation are in no way secondary to other policy priorities but instead are integral to them whether by "others" is meant improving the quality of provision, maintaining and furthering its efficiency, or maximising the contribution of learning to economic, social, and cultural wellbeing (Istance, 1997, p. 16).

A report about that meeting also notes “the challenge is for these insights to gain acceptance, not as grand rhetoric but as normal practice” (Istance, 1997, p. 16), inferring the sentiment was not “normal practice.” It is worth noting that the extent to which political equity imperatives lean more toward rhetoric versus actual practice is often debated.

The first cycle of PISA in 2000 was launched in the middle of an ideological zone of contention regarding education system improvement. On the one hand, neoliberal market-based education reforms were spreading, and on the other, those approaches were avoided more, for example in some Scandinavian countries (Sahlberg, 2023). PISA, with the intention of being the “global yardstick” for education system performance and therefore education

system quality, was poised to be able to shed light on which approach was comparatively better in terms of producing high quality education outcomes for all.

The achievement results from PISA 2000 “shocked” many nations, as is well-documented. The equity results showed evidence (rather than just rhetoric) to counter the thinking that high-equity and high-quality are conflicting education system aims. That “shock” was not as readily picked up by the media but was evident in the report of the first results. As McGaw describes (2008, p. 234):

For PISA 2000, the relationship between the index of economic, social and cultural status and achievement at the student level was analysed. For all countries, there was a positive correlation and a positive regression slope indicating the extent to which, on average, increments in the advantage of students’ social background were associated with increments in the average level of performance on the PISA assessments.

However, PISA 2000 results in Canada, Finland, Iceland, Japan, and Korea showed that even with “mitigating the effect of social disadvantage” they were still “among those with the highest levels of overall student performance” (OECD, 2001, p. 4) demonstrating it is possible for a country to achieve relatively high performance while maintaining a relatively high degree of equality between advantaged and disadvantaged socioeconomic groups. Sahlberg (2015, p. 62) highlights the significance of that finding:

Until the first PISA study in 2000, it was not clear if equality-based education policies and heavy investments in enhancing equity were actually any good for raising the quality of learning outcomes at the system level...One of the unexpected aspects of the first PISA findings was that most of the education systems with high overall student learning were also the most equitable.

PISA 2000 results, surprisingly to some, did not support the notion that neoliberal and market-based education reforms lead to superior education system quality. It is important to

highlight that those findings, including about the relationship between equity and quality are only in relation to the OECD's concept and measurement of both. As Raffe (2008, p. 25) notes about Scottish education, but holds true about observations of equity or inequity in any context "conclusions about the equity of Scottish [or any] education depend on the concept of equity that is used."

PISA 2000 was such a success in terms of its global impact and regard that in 2002 the OECD set up a Directorate for Education. Each year more and more countries and economies signed up to participate in PISA. PISA results in 2003 and 2006 continued to show that education systems *can* be both high quality and high equity (OECD, 2004, OECD, 2007). PISA 2003 and 2006 result reports provide some "strategies aimed at raising performance and improving equity in the distribution of educational opportunities" (OECD, 2004, p. 193) like reducing socioeconomic segregation of schools and "providing a specialised curriculum or additional instructional resources for students from disadvantaged socio-economic backgrounds" (p. 193) based on international comparisons and PISA findings.

A goal and focus for the OECD and its member education systems regarding enhancing equity in education was geared towards enhancing adult economic productivity. As Pont notes (2004, p. 31) adult learning became "a policy priority for economic growth and social development in OECD countries." According to interpretation of the European Union Labour Force Survey 2000 results "it is people who have the highest educational attainment levels who feel that they would like to participate and who actually do participate more (in adult learning), revealing a close complementarity between initial education and adult learning" (Pont, 2004, p. 35). This was a motivator for the OECD to figure out how to get more students to complete initial education, so they would continue through with adult learning and be better contributors in the adult workforce and support economic growth.

A study was set-up to investigate strategies that different systems use to achieve greater secondary-school completion or rather to “reduce school failure and dropout...and avoid the large social costs of marginalised adults with few basic skills,” yielding the first equity-related OECD report in 2007 entitled *No More Failures: 10 Steps to Equity in Education* (Field et al., 2007, p. 9). The focus of the report was primarily on preventing school failure and dropout as “addressed on three fronts: the design of education systems, educational practices and resourcing” (Field et al., 2007, p. 3). Design recommendations included: limit early tracking and streaming and postpone academic selection, manage school choice to contain the risks to equity and offer second chances to gain from education. Practice recommendations covered reducing year repetition, strengthen links between school and home, and respond to diversity and focus on inclusion of migrants and minorities within mainstream education. Resourcing was suggested to prioritise early childhood⁴ provision and basic schooling as well as those students and regions with the greatest need.

The *No More Failures* report marks the first time that a clear (though still broad and open to interpretation) definition of equity in education from the OECD was introduced, along lines that are still used currently in OECD documents (Field et al., 2007, p. 11): Equity in education has two dimensions. The first is fairness, which implies ensuring that personal and social circumstances – for example gender, socio-economic status or ethnic origin – should not be an obstacle to achieving educational potential. The second is inclusion, which implies ensuring a basic minimum standard of education for all – for example that everyone should be able to read, write and do simple arithmetic.

The inclusion equity dimension in PISA is assessed according to the proportion of students who achieve at least a baseline level of proficiency (Level 2 on PISA). These dimensions broadened the equity agenda beyond access and inputs, focusing more on

outcomes. This report also points to the European Union's calls for education that promotes both equity and efficiency and that they are mutually reinforcing.

PISA 2009 results created significant controversy when Shanghai participated for the first time and topped the rankings in all achievement domains (Dillon, 2010). Many education experts and policymakers were curious about the factors contributing to Shanghai's success, particularly given China's reputation for having a rigid education system with an emphasis on rote learning and extensive after-school tutoring, or shadow education. Media coverage of Shanghai's results portrayed them as a wake-up call for Western education systems, and some Western education systems tried to follow (Shanghai/East Asia) suit.

However, PISA 2009 results did not show Shanghai as having achieved particularly high levels of equity in education, despite its top overall performance. The results prompted discussions on the achievability of equity, particularly in relation to high education system performance. Around this time, some countries and systems began implementing reforms as a response to PISA results, with the intention to quickly climb PISA league tables. For example, some education system policies reflected improvement strategies aiming to narrowly focus on raising student achievement in domains related to PISA, overlooking broader points and strategies for system improvement, for example in the 2007 *No More Failures* (and other future) equity-related reports. Nevertheless, PISA 2009 results still demonstrated that educational equity and quality *can* go hand-in-hand at the system level, and this consistent finding from PISA with emerging policy and practice recommendations on how to enhance equity at the education system level are the most noteworthy aspects of this period regarding the OECD's evolving position on equity in education.

3.6.2 Period from 2012 to 2015: equity and excellence go hand-in-hand

By 2012, the Global Financial Crisis (GFC) and lingering concerns regarding China's high results sparked a renewed focus from the OECD on how to support *all* students to succeed. Based on continued analysis of PISA and examining how policies and practices adopted in schools and school systems are related to student achievement and equity, in 2012, the OECD report *Equity and Quality in Education Supporting Disadvantaged Students and Schools* for the first-time stresses that "*the highest performing education systems are those that combine equity with quality*" (OECD, 2012, p. 3). This is a noticeable shift in OECD reporting language on equity in education from stating that it is *possible* to have both high-equity and high-quality to that it is in fact what the "highest performing education systems" achieve. This is a bold and major shift in tone for the OECD regarding equity in education, the OECD laid a stake in the ground claiming equity in education is essential for systems excellence.

This shift is likely connected to the OECD wanting to keep a "humanitarian" pace and relevance with the UN's Sustainable Development Goals that were initiated in 2012 (Xiaomin and Auld, 2020). Particularly due to the crisis of capital from the GFC, this report stresses the importance of aligning available education resources with school and student needs to promote equity and efficiency. The 2012 report notes "...investing in high quality schooling and equal opportunities for all from the early years to at least the end of upper secondary is the most profitable educational policy," (p. 3) stressing the importance of the early years as foundational for lifelong success, and for efficiency. It also states, "differences between socio-economically advantaged and disadvantaged students, immigrant and non-immigrant students, or between those attending rural and urban schools indicate the degree to which an education system is equitable" (p. 28).

Building from the 2007 *No More Failures* report, the 2012 report also focuses on policy levers and system design to enhance equity in education, still focused on reducing dropout and increasing secondary school completion. The five overarching system design

recommendations were: eliminate grade repetition, avoid early tracking and defer student selection to upper secondary, manage school choice to avoid segregation and increased inequities, make funding strategies responsive to students' and schools' needs, design equivalent upper secondary education pathways to ensure completion (OECD, 2012, p. 90). The 2012 report clearly expresses that features at the system level can help or hurt school level efforts to enhance equity. It also includes analysis and policy options to support enhanced equity at the school level: strengthen and support school leadership; stimulate a supportive school climate and environment for learning; recruit, develop, support and retain high quality teachers, ensure effective classroom learning strategies; and prioritise linking schools with parents and communities (OECD, 2012, p. 146–147).

Corresponding with the shift in OECD claims about the importance of equity, *PISA 2012 results* are titled *Excellence through Equity*, stressing highest performance (excellence) is connected to or achieved via equity. Post-2012, Sellar and Lingard (2014b, p. 933) wrote:

... the focus in PISA on both quality and equity, reflect the underpinning assumption that all nations should be aiming for their schooling systems to be both high quality and high equity. This encourages the participation of nations with governments from across the political spectrum...

However, “across OECD countries, only about one in ten education reforms is followed by any attempt to evaluate its impact” (OECD, 2023c, p. 334).

In 2014, the Director for Education and Skills at the OECD, stressed that: “excellence in education without equity risks leading to large economic and social disparities; equity in education at the expense of quality is a meaningless aspiration” (Schleicher, 2014, p. 17) and that “the most advanced education systems now set ambitious goals for all students, with a clear focus on equity...” (Schleicher, 2014, p. 14). In 2015, the *Education Policy Outlook 2015: Making Reforms Happen* Equity and quality in education (p. 43) states:

Policies that combine equity and quality refer to those focused on ensuring that personal or social circumstances do not hinder achieving educational potential (fairness) and that all individuals reach at least a basic minimum level of skills (inclusion). They comprise investing in early childhood education and care (ECEC), tackling system-level policies that may hinder equity (such as grade repetition, unsupported school choice or early tracking) and supporting students from disadvantaged backgrounds.

A main point regarding the OECD's evolving approach to equity in this time period is the stance that to be high-performing (or excellent), education systems *must* (not just *can be*) be both high-quality and high-equity.

It is worth again noting that the OECD's claims are often mostly in relation to OECD data, which has brought criticism. For example, Savage (2017, p. 151) brings up that regarding the OECD and its dominant "economic framing of equity" ... "'other' ways of understanding equity get lost and broader concepts, such as 'social justice', get pushed to the margins." Meanwhile, the OECD contends that equity in education is *more* than a social justice imperative. Additionally, scholars have claimed that the OECD has "rearticulated social justice" as equity in education as defined and assessed in PISA, narrowing the scope and broader considerations, "such as Nancy Fraser's work on the redistributive, recognitive and representative dimensions of social justice, which has been usefully applied to education" (Lingard et al., 2014, p. 711).

In 2014, an open letter from around 100 education experts around the world criticising the PISA assessments was published, calling for the OECD to reconsider its approach to global education assessments, highlighting the potential harm to educational practices and goals that prioritise a well-rounded, inclusive education (Meyer and Zahedi, 2014).

Addressing that letter, Sahlberg and Hargreaves (2015) acknowledge faults with PISA, but

also note PISA's useful findings regarding the importance of prioritising equity in education and disputing neoliberal-based education reforms for education system improvement. Also responding to the 2014 letter, Harris and Zhao (2015) question the worthwhileness of PISA since:

The PISA measure has become far more important than the process it attempts to measure or quantify. The neat narratives of high performance and the romantic accounts of success fuelled by the PISA league tables have dumbed down educational reform to little more than copying and pasting from the 'best' based on rhetoric rather than reality.

Along similar lines according to Jónasson "one of the problems with PISA is that it hijacks the discourse. It may have positive aspects, but it is very damaging when one measure takes over the discourse and tells you what needs to be addressed" (Hatch, 2024, para. 7).

Acknowledging the complexity of PISA's effect in education systems, Takayama (2015, p. 4) points out:

The actual effect of PISA cannot be assumed in a straightforward fashion; it is often heavily reinterpreted and reassembled with other data and facts to generate varying, often unpredictable policy effect, including those clearly countering policy solutions favourably highlighted by OECD. By directing their criticism solely at PISA and OECD, the open letter and Harris and Zhao, hence, tend to let national and sub-national policy actors off the hook, when in fact what policy effect PISA could have, is determined largely by how its data set becomes acted upon by these policy actors. Indeed, the OECD has but only "soft power" from which to "govern" education globally. It could be argued that many of the critiques of the OECD regarding equity in education are less about the OECD/PISA and more about national and sub-national articulations and responses to "quality" improvement recommendations related to the OECD/PISA that often miss or overlook the coinciding equity recommendations.

3.6.3 Period from 2015 to present: equity holds many hands

During this period that includes the OECD's current position on equity in education the OECD's approach to equity in education broadens to include concepts like wellbeing, inclusion, and diversity. To demonstrate this position, we provide some illustrative examples. It is worth noting that to date traditional PISA presses on and the OECD travels down a similar path in this period in that regard, however, with some changes most notably in the 2022 assessment that are discussed in this section.

PISA 2015, 2018 and 2022 results continue to show that high-equity and high-quality can go hand-in-hand, and also that it “remains necessary for many countries to promote equity with much greater urgency” (OECD, 2020a, p. 4). PISA 2018 results highlight three main areas of education policy linked to equity of education, refining from the 2012 equity-focused report: grouping and sorting students, resources invested in education (financial, human, material and any other kinds of learning resources), and education system governance. The 2018 PISA results also describe PISA's evolving approach to what should be assessed to “develop first-class humans,” noting this is an issue “that the OECD is currently exploring with our Education 2030 project” (OECD, 2020a, p. 3).

3.6.3.1 Future of education and skills 2030

The OECD's ideas about what skills will best support future productivity start to change, i.e. what PISA should assess, and in turn then, changing what kind of achievement ‘equity/ESCS’ will be evaluated against. For example, as noted by Xiaomin and Auld (2020, p. 512), when asked about the relevance of PISA, the Director for Education and Skills at the OECD replied:

The current PISA is the reflection of the framework that we developed in 2000. Now we need a new one, and that will guide the development of PISA from 2024 onwards ... The current PISA doesn't include many elements that are important. We need to do better on *social skills*, on *creative skills*, so the new framework – the 2030 framework is really about *developing new ideas* for what PISA should assess.

That new framework, initiated in 2015, is the OECD's *Education 2030: Vision for the Future of Education* (OECD, 2018), which includes transformative competencies that students will need to successfully navigate the uncertain future: creating new value, taking responsibility, and reconciling tensions and dilemmas. The OECD's *Learning Compass* is an expression of the aspirational future 2030 vision for education. Student agency is a main feature of the *Learning Compass*, as students need to learn to “navigate by themselves through unfamiliar contexts” with poise and perseverance (OECD, n.d.-a), akin to maximising their “(self-)appreciation of human capital” (Feher, 2009, p. 29).

In the OECD's 2030 vision, there is not much to say about equity in education. The 2030 agenda represents a noticeable shift in the OECD's education work from system design and policy considerations to more of a curriculum focus, something the OECD previously steered clear from directly advising on. One of the only explicit focuses on equity in the 2030 vision is thus largely linked solely to that feature: *Adapting Curriculum to Bridge Equity Gaps Towards an Inclusive Curriculum* (2021) directly addresses an issue the OECD sees as many innovations of curriculum exacerbating “equity gaps” rather than closing them (p. 7). Chapter 3 of that report includes the “unintended consequences and lessons learned” of changing “the paradigm of ‘learning and assessment’ to favour the whole child and person development” as well as “do not underestimate the resources required to close observable and non-observable equity gaps” amongst others.

3.6.3.2 Student wellbeing

Wellbeing is centrally featured in *Education 2030*, it has also been an emerging focus more broadly in the OECD's education work, often coinciding and related to efforts and conceptions of equity. Global trends suggest overall decline in children's wellbeing over the past decades. As a recent report states: "It is now accepted that mental ill-health is the primary threat to the health, wellbeing and productivity of young people" (Orygen, 2024). Based on results from the *Strength through Diversity Policy Survey 2022*, the OECD stressed the need for education systems to focus on more than traditional academic skills and called out the dearth of attention given to broad aspects of student wellbeing in schools. Results showed that for the 34 systems who participated in that survey: "for all student groups, data on any type of well-being outcomes were collected considerably less often than data on academic outcomes" (OECD, 2023c, p. 319). PISA started gathering data related to student wellbeing in 2015, for example, regarding their sense of belonging at school and self-efficacy (OECD, 2017).

Due to increasing uncertainty in the world, there is some thinking that it will be important for individuals to be able to maintain wellbeing for social cohesion and economic viability, in a world that might be falling apart (e.g. climate change) and in which job prospects and governmental support might also be increasingly unreliable (e.g. AI and tighter budgets). Particularly since COVID-19, wellbeing is largely joining equity as a main education system future focus and priority. As Robertson and Navia argue (2024), these broader happiness or wellbeing focused policies continue to align "with neoliberal tenets focused on self-regulation and control for the economy." Since traditional "PISA scores have been found to have a negative correlation with student wellbeing, a finding that was finally openly acknowledged by PISA in a 2017 report" (Zhao, 2020, p. 253) perhaps this OECD focus on student wellbeing is in response to that acknowledgement and in hope that more wellbeing will lead to improvement that the equity focus has not been able to achieve yet.

The latest 2022 PISA results (OECD, 2023b, p. 6) are expressed with wellbeing included, representing that:

...education systems can provide both high-quality instruction and equitable learning opportunities for all, and that they can support academic excellence not at the expense of wellbeing, but through students' well-being.

The 2022 PISA results categorise equity in education a bit more broadly but also more succinctly than “inclusion” and “fairness.” The 2022 PISA results report (Volume I) considers education systems' equity according to: the percentage of 15-year-olds enrolled in school in Grade 7 or above, the gap on PISA score related to students' socio-economic status, PISA scores for boys versus girls, for non-immigrant versus immigrant students, and the percentage of students reporting not being able to afford to eat at least once a week (OECD, 2023b). That report for the 2022 PISA results also states (p. 110): “Equity is a fundamental value and goal of education policy.”

3.6.3.3 Diversity, inclusion and broader monitoring

A global trend in education systems is increasing diversity in student populations. The OECD is increasingly coupling the concept of equity with concepts like inclusion and diversity (OECD, 2021). Additional student equity groups are added in recent reports like Indigenous background, sexual orientation, gender identity, special education needs, and giftedness. Although the concept of equity in education is often defined since 2007 in OECD documents through the principles of inclusion and fairness (with inclusion meaning all students achieving at least Level 2 on PISA), the 2023 report *Equity and Inclusion in Education Finding Strength through Diversity* outlines “why it is relevant to differentiate between equity and inclusion” (OECD, 2023c, p. 29):

A focus on educational equity may not be enough to fully address student diversity. Indeed, an exclusive focus on equity could lead to narrow assimilationist or isolationist policies and practices without fully addressing inclusion. For example, having all students achieving a minimum level of performance and meeting educational goals that are established without considering the diversity of their experiences (assimilation) can promote equity but not inclusion...inclusion is more strictly associated to who the individual is, i.e., their identity (e.g. cultural identity, gender identity) and whether the education system acknowledges individuals for who they are (i.e. sense of belonging). Moreover, inclusion fosters students' well-being as a key element to ensure their full participation in education through the development of their self-worth and sense of belonging to school and communities. Well-being is generally not as much of an explicit focus in relation to equity.

The chapter entitled *Monitoring and Evaluating Equity and Inclusion* in the *Equity and Inclusion in Education Finding Strength through Diversity Report* (2023) outlines the UNESCO Institute for Statistics' (2018) *Handbook on Measuring Equity in Education's* classification of equity in education into five concepts: meritocracy, minimum standards, impartiality, equality condition and redistribution, acknowledging broad conceptions of equity in education. That section of the report also suggests, rather than focusing solely on outcomes to monitor progress in equity and inclusion, that an "inputs-processes-outcomes model" is used (OECD, 2023c, p. 313):

Inputs...include not only financial resources but also policies, teacher training, curriculum and leadership. Processes are practices in schools such as the development of school climate, collaboration or support to individuals...Outcomes include educational outcomes (e.g., participation, dropout, grade repetition rates and achievement), well-being outcomes (such as sense of belonging, mental health and

school climate) and non-educational outcomes (for example economic and labour market outcomes, and health outcomes). By focusing on inputs and processes in addition to outcomes, the model can shed more light on the potential causes for regressed outputs.

Providing yet another way to more broadly consider equity in education, in 2022, the OECD launched its Education Equity Dashboard that measures equity in education systems using 35 comparative indicators largely from PISA and some other international student assessment data, “covering both educational and economic outcomes,” (OECD, n.d.-b) but not covering every aspect that the OECD has reported to be important to consider regarding improving equity in education, for example issues like concentration of disadvantage (OECD, 2012).

3.6.3.4 Human flourishing – high performing systems of tomorrow

Since 2018, a group of OECD jurisdictions whose students regularly achieve high scores and do so to a significant extent irrespective of background have been getting together to discuss a new narrative for the future of education, one that fosters human flourishing in the context of rapid AI advancements (OECD, 2023d, p. 10). The conceptual framework document for HPST notes that HPST “takes inspiration” from the *Learning Compass* and suggests focusing on student/human flourishing as the future purpose of education. Flourishing is described as embodying three principles: broader capabilities, “nurturing the designers of fair and sustainable models for the future” and restoring “meaning to people’s lives” (OECD, 2023d, p. 9). Future competencies to accomplish such flourishing in education systems have been identified by HPST as: adaptive problem solving, ethical decision-making and aesthetic perception.

With the focus on flourishing (rather than traditional human capital, but arguably still to support an updated human capital ideology), the HPST have an updated take on equity in education (OECD, 2023d, p. 17):

Equity policies would be designed less to help everyone achieve the same thing, expressed as a single set of minimum education requirements. They would be designed more to help everyone find their purpose through learning, combining aspirations and distinctively human competencies in order to make a different, personal contribution to future transformation.

The HPST conceptual report notes, quite obviously, that there are three main ways the future of equity in education could go: inequity could get worse, stay the same, or improve.

3.7 Brighter future of equity in education

The three periods described in this article show how the OECD's position on equity in education has evolved since 2000. This evolution is connected to continuing analysis of the OECD's own data in relation to increasing considerations of policies and practices that best support education system improvement, as considered through progressing ideas about optimising human capital and a desire to maintain its own organisational relevance (Elfert and Ydesen, 2023, Kim, 2024, Robertson and Navia, 2024, Ydesen and Bomholt, 2020). We believe that in the future the OECD's position on equity in education will continue to follow this kind of evolutionary trajectory. Based on the analysis in this article we conclude that the OECD's active role in education policy development is a reason why equity has become a policy priority in national education sector strategies around the world.

Interestingly, even though many national education policies and reforms have given equity a central role, inequities in education persist and are getting worse in many parts of the world (OECD, 2023b, UNESCO, 2024). Michael Fullan, who has researched education

reforms around the world during the past half-century, has argued that most large education systems have backslid relative to equity and that attempts at improving equity seem to have worsened the problem (Fullan, 2025). An intriguing question is: Why?

Though there are many different and interrelated avenues one could go down to try to explain this notable gap between equity policies and improved equity of outcomes, one reason may be that equity has remained an inadequately defined concept in education policies and reforms (Sahlberg and Cobbold, 2021). The absence of clearer definition of equity in education means that it is ineffectively included in education system performance monitoring frameworks and accountability arrangements. Another explanation as articulated in an OECD policy perspectives paper in 2020 could be due to the “gap between the attention given to the policy while it is being designed and the lack of attention when it comes to implementing it, as well as resistance against the reforms or lack of capacity to put them in place, amongst other reasons” (OECD, 2020b, p. 2). Viennet and Pont (2017) have proposed a framework for education policy implementation that could help the OECD to support national education policy implementation that would narrow the gap between policies and practices at national and local levels (e.g. the OECD’s *Implementing Education Policies* series).

Finally, the important role that early childhood education and care plays as a foundation of equity and quality of further education has been, and continues to be, undervalued in many education sector policies and reforms around the world. Early childhood education is often a responsibility of different public service sectors than education and therefore beyond education strategies and priorities. A recent OECD report (2025, p. 17) *Reducing Inequalities by Investing in Early Childhood Education and Care* stresses that “ECEC policies have the potential to mitigate inequalities.”

The OECD is not the only international organisation in educational development. Equity is also a central part of the United Nations’ Sustainable Development Goals (SDGs).

For example, SDG 4 is to ensure inclusive and equitable quality education and promote lifelong learning opportunities for all and includes a global indicator 4.5.1 that is the ratio of achievement by a disadvantaged group relative to a privileged group (i.e., parity index). It enables monitoring disparities that can be disaggregated by sociodemographic groups, such as minimum proficiencies in reading and mathematics, the completion rates, and early childhood education participation rates. Yet, the equity target (4.5) in UNESCO's latest Global Monitoring Report (2024, p.7) is about eliminating gender disparities in education and ensuring equal access to all levels of education.

The OECD recommends that policies be tailored “to education systems’ particular contexts” (OECD, 2023b, p. 226). As such, education system leaders may ask to what extent do they want OECD policy advice on equity in education to influence school reforms and practices in the future and how equity in education could be better addressed in their contexts. We suggest that national education policymakers actively build consensus on the purpose of education and then clearly define educational equity in a practical way. This would then enable accurate monitoring, functional accountability, and precise practice to better address prevalent educational inequities in the future.

Chapter 4. Policymakers' conceptions of equity in education in Scotland and South Australia

This chapter is presented as the author-submitted manuscript of an article submitted to the *Australian Educational Researcher* in 2026.

4.1 Abstract

Equity in education has become a policy priority in OECD countries since the early 2000s. Evidence from high-performing systems, as defined by PISA, has revealed that the best performing systems combine equity and excellence in policies and reforms. Effective equity-oriented education policies depend on policymakers having a shared, clear, and meaningful understanding of equity. If policymakers lack a shared clear understanding of equity, effective policymaking could become more difficult. The aim of this article is to examine senior education policymakers' understandings of equity in education. This article draws upon qualitative data collected from senior education policymakers in Scotland and South Australia. The main finding is that education policymakers have different conceptions of equity in education, even within the same jurisdiction. The conclusion is that a clearer and broader shared understanding of equity in education is important within education systems, particularly considering the efforts and impetus for policymakers to enhance equity.

4.2 Introduction

Equity in education has become a policy priority in Organisation for Economic Co-operation and Development (OECD) countries since the early 2000s. Many OECD nations include “equity” and “excellence” as top national education system aims, for example, Australia and Scotland. In Australia, “excellence” and “equity” are the dual main goals for Australian education as per the *Alice Springs (Mparntwe) Education Declaration* (Council of Australian Governments Education Council 2019, 1). In Scotland, achieving “excellence” and “equity” are key education priorities as set out in the *National Improvement Framework* (Scottish Government, 2024). However, what equity in education actually means is not clear from Australian and Scottish education policies and documents.

The objective for education systems to address equity in education is in part due to the OECD's influential global role as an education policy influencer and its stated assertion that

the highest performing (or excellent) education systems are those that combine high-quality with high-equity (Senior & Sahlberg, 2025). Enhancing equity in education is also a main intention of the United Nation's Sustainable Development Goals (SDG 4).

Despite well-established imperatives to address equity, there is not a universal, operational, and clear definition of what equity in education means. For example, there are various definitions and different understandings of equity in education in academia, the global education community, and amongst education systems. In academia equity has been called a “chameleon term” and a rearticulation of “social justice” (Lingard et al., 2014; Savage, 2013), amid many other interpretations (e.g. Appels et al., 2023; Cairney & Kippin, 2022; Edgar, 2022a; Harris & Jones, 2019; Levinson et al., 2022).

The OECD describes equity in education according to two dimensions: fairness and inclusion. For the OECD (2018, p. 22) equity also means that:

students of different socio-economic status, gender or immigrant and family background achieve similar levels of academic performance in key cognitive domains...[and] differences in students' outcomes are unrelated to their background or to economic and social circumstances over which the students have no control.

As we have argued elsewhere (Senior & Sahlberg, 2025), the OECD's conceptualisation of equity in education has changed over the past decades. That change includes evolving from looking more at equality of inputs or opportunities to focusing more on equity of an increasingly broader array of outcomes, though still largely connected to data from the OECD's Programme for International Student Assessment (PISA) (ibid.).

Findings from the OECD's *Strength through Diversity Policy Survey* show how equity in education was defined in varying ways in 2022 in 29 education systems (Varsik, 2022, pp. 50-53). In Iceland, for example, the report notes equity is defined more as “equal

study opportunities” while in Chile the concept is defined more with an emphasis on respecting “cultural diversity” and “human rights” (Varsik, 2022, pp. 50-53).

Despite efforts to promote equity, inequity in education remains a persistent global issue (Chzhen et al., 2018; Enchikova et al., 2025; OECD, 2023a) and one of the main challenges for national and sub-national education policymakers and leaders. But why is educational equity so difficult to achieve? One foundational area to consider when contemplating that question is, how do policymakers and educational leaders understand equity in education?

It is often principally senior policymakers who set the parameters for what equity in education means, how it is addressed, how it is assessed, and how it is held to account for being actualised in education systems. A previous study (Senior, 2021) highlighted how the way in which equity in education is defined and understood by policymakers impacts upon how education system policies and practices are designed to address equity in education. Therefore, one way to better understand the concept of equity in education is to better understand how senior education system policymakers conceptualise the term.

In this article, I explore what the conceptions of equity in education are among senior education policymakers in Scotland and South Australia. The purpose of this examination is to understand the position that equity in education has in these education systems. The article also considers corresponding implications of that position regarding operational efforts to improve equity in education systems. The article draws upon qualitative data collected from senior education system policymakers in Scotland and South Australia. Before delving into the Scottish and South Australian positions on equity in education a brief literature review of the concept of equity in education is provided.

4.3 A brief review of equity in education

A common vision for an entirely equitable education system is one in which the disparities that exist in educational outcomes do not unjustly reflect patterns of correlation to a student's background factors like their geographic location, caregivers' economic status, gender, ethnicity, or physical disabilities. No education system has completely actualised that vision, but some have come closer than others. According to OECD PISA data, Finland, Estonia, Japan, South Korea, and several Canadian provinces have achieved high equity and high quality in their education systems (OECD, 2019; 2023a).

How a child achieves in school is still largely linked to their socioeconomic background characteristics, with children from traditionally disadvantaged socioeconomic backgrounds in general achieving lower education outcomes than their more advantaged peers (OECD, 2023a; World Bank, 2018). The concept of equity in education has evolved in response to that unfair, unequal, and inefficient trend in student outcomes. Though there are many ways the concept of equity in education is comprehended, for the purpose of this brief literature review, the main ways that the concept is considered in education systems are explored.

4.3.1 Equity as Equality

The words equity and equality are regularly used interchangeably in education policies and reforms related discourse. More specifically, “equality of opportunity” and “equality of access” are often used synonymously with “equity” in education (Espinoza, 2007). This conflation stems from the thinking that a reason for the unjust and unequal trend in children's education outcomes is connected to not all students having “access” to the same educational “opportunities” whether that be the same school, resources, teacher quality, curriculum, or post-school pathways (Jencks, 1988; Noltemeyer et al., 2012). As the United States Supreme Court's *Brown v. Board of Education (1954)* decreed, public school education is a “right which must be available to all on equal terms.” Scholars have perceived different conceptions

of equality of opportunity. These various conceptions stem from questions about how we know if an opportunity is equal, what is considered an opportunity, what should be equal, and what needs to happen to enable equal opportunities (e.g. see Rawls, 1971; Dworkin, 2000; Sen, 1992; Roemer, 1998; Roemer & Trannoy, 2016).

It is now commonly accepted that always treating all children the same does not necessarily result in all children having more equal outcomes because children are different, with different needs, desires, motivations, and so on (Levinson et al., 2022). In addition, it has become clear that despite efforts to create more equal opportunities or access in education, there is inequality in children's abilities to take up such opportunities due to different factors. Some conceptions of equality of opportunity, for example Rawls' (2001) principle of fair equality of opportunity, try to address that issue by suggesting that equality of opportunity also requires creating equal conditions to have equal chances to access and take up opportunities. Creating more equal conditions can mean unequal treatment for some, for example, additional funding for some students or positive discrimination. Still, a more meaningful way to know if opportunities and access in education are equal is to consider whether education outcomes are equal.

4.3.2 Equity as the Achievement or Attainment Gap

The concept of equity in education is often connected with the achievement or attainment gap, referring to the difference in outcomes between students from different socio-economic groups. This attainment gap focus, in part, was activated by the Coleman Report (1966), which found continued disparities in student achievement between black and white students in the United States even after "more equality" was provided in the form of desegregation policies. Since 2000, OECD reports on PISA data have also emphasised the gap in student achievement between different student groups as a main equity focus.

Closing the “achievement” or “attainment” gap is a main objective of many national and sub-national equity initiatives and policies. In Australia, for example, the main national plan for addressing educational and other disparities between Aboriginal and Torres Strait Islander peoples and non-Aboriginal and Torres Strait Islander people is focused on closing certain gaps in outcomes between those two groups, as outlined in a national agreement entitled “Closing the Gap” (Australian Government, 2025). The Scottish Government has an education focus on “closing the poverty-related attainment gap” (Scottish Government, 2021). Many education systems rely on traditional student outcomes to assess “the attainment gap” like attendance, on-time school completion, and achievement on standardised assessments predominantly in literacy and numeracy. There are abundant academic journal articles connecting the concept of equity in education and the attainment gap, with many recognising poverty as a significant factor influencing disparities in education outcomes (e.g. Akmal & Pritchett, 2021; Brown et al., 2011; Haxhiu, 2022; Mowat, 2017; Nachbauer, 2024; Noguera, 2005; Pang et al., 2011; Reardon et al., 2024).

A main critique of equity as the achievement or attainment gap is that the gap can close for many reasons, one being a decline in achievement from higher performers. Another issue connected to this expression of equity in education is that it has encouraged policies and practices that have problematically focused on a narrow set of “gap/achievement” outcomes (like literacy achievement on a standardised assessment) as driven by high stakes accountability mechanisms. Many argue that such a situation exacerbates inequity in education (Adamson et al., 2016; Gillborn, 2008; Ravitch, 2016; Reid, 2019; Sahlberg, 2023). Increasingly, research suggests broader outcomes like health, wellbeing, positive relationships, engagement, creativity and critical thinking are aspects that are just as important as literacy and numeracy progress for optimal holistic development (Darling-Hammond et al., 2020). In addition, many suggest rather than focusing on “the gap” itself,

there should be more focus on understanding and addressing the various multifaced factors that have sustained such gaps.

4.3.3 Equity as Adequacy

Another way that equity in education is conceived is as an adequate level of education achieved by all (Sahlberg & Cobbold, 2021). This notion is evident in policies that require all students to attend school education for a minimum number of years deemed satisfactory, and in UNESCO's target of all children at end-of-primary age being able to read at a minimum level (UNESCO Institute for Statistics, 2020). The foundational idea for this conception of equity is that all students can achieve an adequate educational standard. It is also socially just and economically wise to provide all children with an adequate education. Yet what is deemed an acceptable adequate standard varies. Brighthouse and colleagues (2018, p.22) suggest an adequate education should allow "for economic productivity, for personal autonomy, for democratic competence, to regard others as equals, for healthy personal relationships and for personal fulfilment." Adequacy can be considered more narrowly, for example, as meeting minimum proficiency standards on conventional standardised assessments. Like equality in education, to know if an adequate level is being achieved, quantifiable outcomes must be considered.

4.3.4 Equity as a Multi-Meaning Term

To make the meaning of equity in education clearer, there are some who have suggested ways to more meaningfully define equity in education. Ainscow and colleagues (2013) put forth that equity must consider an ecology of the complex interconnected factors that affect schools. This ecology would involve (2013, p. 33):

...the underlying socio-economic processes that make some areas poor and others affluent, and that draw migrant groups into some places rather than others. They are also influenced by the wider politics of the teaching profession, of decision-making at

the district level, and of national policy-making, and the impacts of schools on one another over issues such as exclusion and parental choice. In addition, they reflect new models of school governance, the ways in which local school hierarchies are established and maintained and the ways in which school actions are constrained and enabled by their positions in those hierarchies.

Ainscow and colleagues continue with a suggestion “to think of three interlinked areas within which equity issues arise.” These are: “within schools, between schools and beyond schools” (Ainscow et al., 2013, p. 33). In the chapter entitled *Monitoring and Evaluating Equity and Inclusion* in the *Equity and Inclusion in Education: Finding Strength through Diversity Report* (2023) there is a suggestion that equity should consider inputs, processes and outcomes (OECD, 2023b, p. 313):

Inputs...include not only financial resources but also policies, teacher training, curriculum and leadership. Processes are practices in schools such as the development of school climate, collaboration or support to individuals...Outcomes include educational outcomes (e.g., participation, dropout, grade repetition rates and achievement), well-being outcomes (such as sense of belonging, mental health and school climate) and non-educational outcomes (for example economic and labour market outcomes, and health outcomes).

One usual way that education systems aim to support equity as conceptualised above and in other ways is through resourcing mechanisms, a means regularly met with contention. There have been numerous adequacy lawsuits in the United States (West & Peterson, 2007). While research shows that sufficient and additional resourcing has the most impact on traditionally socioeconomically disadvantaged students and schools (Cobbold, 2019), meaning adequate resourcing is vital for equity efforts, lack of significant progress shows us that such funding based approaches have largely been inadequate to wholly address inequity.

The issues explored so far in this article speak to the question: how do current policymakers understand the concept of equity in education? Before addressing this question in terms of policymakers in Scotland and South Australia, a brief introduction to the Scottish and South Australian education systems is provided.

4.4 The education system and equity background in Scotland

Since devolution in 1999, the Scottish Government has overall control of and accountability for education in Scotland. Education Scotland is the national body charged with supporting quality and improvement in learning (Education Scotland, n.d.). In addition, there are 32 Local Authorities that are responsible for the local provision of education. Most children in Scotland attend their local public school.

Guiding education visions and priorities are outlined in the *National Improvement Framework (NIF)*, which was established in 2015. One guiding vision in the *NIF* is “excellence through raising attainment and improving outcomes” while the other is achieving equity, expressed as:

ensuring every child and young person has the same opportunity to succeed, no matter their background or shared protected characteristics, with a particular focus on closing the poverty related attainment gap.

One way Scotland has strived to distinguish itself from other countries in the United Kingdom and to enhance education, was by developing a new national curriculum post-devolution.

4.4.1 Curriculum for Excellence

Scotland’s 3-18 *Curriculum for Excellence (CfE)* was announced in 2004. *CfE* aimed for children to develop four main capacities: to become "successful learners, confident individuals, responsible citizens and effective contributors” (Education Scotland, 2025). At the time, this kind of broad focus was regarded as particularly progressive.

CfE was intended to steer Scottish education “towards a model that relies upon professional capacity to adapt curriculum guidance to meet the needs of local school communities” (Priestley & Humes, 2010, p. 345). As such, the approach that went with the new curriculum was that teachers would largely discern and adapt the curriculum to meet local student needs, with progression relying more on teacher evaluations and judgements rather than formal assessments. Meeting all students’ needs (equally, to reduce the attainment gap, and/or adequately) is one way that equity in education is envisaged. The *CfE* was rolled out to all primary and secondary schools in 2010/11² and endures to date. In addition to literacy and numeracy, health and wellbeing were established as core areas, as well as languages, expressive arts, sciences, religious and moral education, social studies and technologies.

Findings from a recent National Discussion on education suggest that the capacities of the *CfE* should be retained but that the assessment and qualifications framework does not yet align with *CfE* aspirations (Campbell & Harris, 2023). Rather than focusing on broader capacities, assessment, qualifications (and inspections) prioritise progress in literacy, numeracy, and traditional high-stakes exam performance, especially in the senior secondary phase. As Hayward and colleagues explain (2023, p. 84):

...the examination system [in Scotland] has remained remarkably consistent since its establishment in 1888. This consistency can, at least in part, be attributed to a public perception that the examinations could be trusted and have been a dependable means of giving students a fair chance to demonstrate their attainment.... examinations in Scotland have been seen as fair—a vehicle for greater equity. The examination system and the opportunities it offered for young people to demonstrate achievement were

² The first structured and ongoing review process for the *CfE* is underway for the first time since its inception in Scotland: <https://education.gov.scot/curriculum-for-excellence/about-curriculum-for-excellence/the-curriculum-improvement-cycle-cic/>.

[historically] perceived to be a protection against prejudice, e.g., against women or the Catholic community.

Senior secondary exams are largely competitive, reflecting traditional preparation for a conventional university-based post-school pathway. Inspections value high achievement in such exams. So, there is incentive for schools to prioritise results in the subjects geared toward traditional university entrance requirements over more *CfE* aligned broader, holistic, interdisciplinary, or vocational learning, thus, limiting the curriculum's transformative potential.

In line with findings from the recent National Discussion, a more modern perception is that the traditional senior secondary examination and school inspection systems are now vehicles for greater inequity in education (e.g. Muir, 2022 and Hayward, 2023). One reason for that updated perspective is that the secondary schooling system narrowly prioritises one dominant traditional path, that not all students equally want to or have been able to follow. Also, projections about the future of work suggest capabilities, pathways, and skills outside of the current dominant traditional university pathway will be desirable for sustainable societal success.

4.4.2 Funding

In a report *Closing the Attainment Gap in Scottish Education*, Sousa and Ellis (2014) highlighted that “there is limited funding [in education] directly aimed at closing the poverty attainment gap” (p. 22), unlike in England and Wales. What followed was the government's launch of the Scottish Attainment Challenge (SAC) (2015) and Pupil Equity Funding (PEF) (from 2017). The introduction of the SAC represented a significant development in Scotland's

equity journey, seeking to close the poverty-related attainment gap (PRAG³) through targeted funding (from the Attainment Scotland Fund).

Initially, SAC funding was only given to high-poverty local authorities, but post-2021 attainment funds were distributed according to student levels of deprivation across all local authorities. PEF is the main way SAC funding is distributed to the education system, providing “additional” funding directly to headteachers to use at their discretion based on the number of children in their school eligible for free school meals, to close the poverty related attainment gap.

As a result of receiving SAC funding, local authorities and schools were increasingly expected to deliver on centrally defined poverty related attainment reduction outcomes particularly in relation to literacy and numeracy. According to Gillies (2018, p. 111):

The whole political venture (of narrowing the attainment gap), while worthy in its social goals seems based on limited understanding of the nature of the attainment gap, the factors which support it, and the massive socio-economic and cultural overhaul required to address it.

As of 2024, the relative child poverty rate in Scotland was 22% with an absolute child poverty rate of 17% (Scottish Government, 2025).

The SAC continues as a main initiative in Scotland to attempt to address equity in the education, understood as closing the poverty related attainment gap. The NIF identifies 13 key measures of the ‘attainment gap’ including early childhood development health and wellbeing statistics, achievement of expected literacy and numeracy in certain year levels, school attendance, the achievement of higher levels (levels 4, 5, and 6) of Scottish qualifications (the highly exam-based school leaving qualifications), and the destinations of

³ Poverty is often measured against the [Scottish Index of Multiple Deprivation \(SIMD\)](#). SIMD measures deprivation across seven criteria: income, employment, education, health, access to services, crime and housing.

young people three months post-secondary school completion, in relation to the gaps in these areas between children and young people from most and least deprived areas (Scottish Government, 2023). Chapman and Ainscow (2025) observe that the continual focus on closing the poverty related attainment gap in practice has resulted in “a tendency to narrow the curriculum, focusing on literacy and numeracy, and allocate teaching time on those areas of learning that are seen as being most important,” despite “Curriculum for Excellence” (pp. 378-379). At the time of writing, SAC and PEF funding has been guaranteed to continue until 2026.

4.4.3 Third Party Engagement

Scotland has invited the OECD to review its school education system three times since 2000. Each invitation has been accepted and resulted in OECD reports that Scotland has incorporated into education system improvement efforts. According to Hossain (2024) “scholars consider this ‘reaching out’ a reciprocal process” (p. 115).

The 2007 OECD report, *Quality and Equity of Schooling in Scotland*, noted the “achievement gaps that appear in primary education (around P5) and uneven participation and completion patterns in secondary education” (p. 3). The report highlighted that there were little between school differences regarding student achievement in Scotland, that the differences were mostly *within* school based on characteristics of the child (p. 68). As reported: “The problem is not, in the main, unequal access to good schools—as if there were wide variations in school quality—but unequal capacity to use good schools well” (p. 59).

A solution, as indicated by the report, could then be a more flexible curriculum, like the *CfE* in fact, that could ideally better address the whole spectrum of children’s characteristics. This suggests the onus for improvement is mainly on schools via teachers to differentiate and individualise the aims of the curriculum to meet all local student needs (Raffe, 2008), which could be evidenced by smaller achievement gaps. The OECD 2007

report then, highlighted the purpose of the *CfE* to address inequalities in achievement, or rather to improve equity in education. Edgar (2022b, p. 125) notes “the term ‘equity’ itself...did not appear in any [Scottish curriculum education] policy texts published before 2008. This suggests that the OECD’s work may have been particularly influential in introducing the term ‘equity.’”

The second report from the OECD (2015) highlighted the widening achievement gap between students as related to their economic backgrounds as children progressed through their school education (BBC News, 2015). That report corresponded with the government’s shift from focusing on addressing inequity in education through the lens of curriculum design to rather a discourse and focus on closing the poverty related attainment gap, especially in literacy and numeracy (main PISA domains). Illustrating this shift, in 2015, the First Minister of Scotland declared that closing the attainment gap was her “defining mission.” At the same time, broader cross-sectoral strategies spanning across policy domains such as *Getting It Right for Every Child* (GIRFEC), the *Child Poverty Strategy for Scotland*, and the *Child Poverty (Scotland) Act 2017* had similar aims.

The (2021) OECD report, *Scotland’s Curriculum for Excellence: Into the Future* suggested that too much focus on exams in later years of schooling and barriers of the qualifications system have contributed to stifling the actualisation of the (more equitable and excellent) visionary ideals of the *CfE* (pp. 49-61). An example of the influence of the OECD’s analysis on Scottish education is that the new Education (Scotland) Bill (2024), established a new qualifications body, Qualifications Scotland, as a direct response to the most recent OECD report. Some, however, view this change as a “superficial rebrand” (BBC News, 2025). The recent OECD report also noted the highly politicised nature of education in Scotland, as well as further recommendations for more clarity and coherence for Scotland’s education system improvement plans.

4.5 The education system and equity background context in South Australia

Australia is a Federation with six states and two territories. Founded in 1836, South Australia is one of the smaller Australian states. States constitutionally have responsibility for school education, however, over the past several decades the federal government has been increasingly playing a more active role in setting standards and monitoring performance of school education. The Department for Education in South Australia oversees public school education and is led by a chief executive. The Minister for Education, Training and Skills is accountable to Parliament. Around one third of children attend private schools (Australian Bureau of Statistics, 2025).

Australia's *Alice Springs (Mparntwe) Education Declaration* affirms the number one goal for Australian education as agreed to by all state and territory education ministers is to promote 'excellence and equity' (Council of Australian Governments Education Council 2019, 1). Preceding that declaration was the 2008 *Melbourne Declaration* that similarly included 'equity and excellence' as top dual goals for Australian education.

4.5.1 Strategy for Public Education

South Australia launched a new public education strategy in 2023, *Our Strategy for public education in South Australia*, in which "equity and excellence" is one of four main priority areas. In the new 2023 strategy "equity and excellence" is described as:

We strive for excellence including foundational capabilities such as literacy, numeracy and digital literacy in all learners, by providing varied, challenging, and stimulating experiences. As well as opportunities that enable all learners to explore and build on their own abilities, interests, culture and experiences. We seek out inequity, eliminate barriers to opportunities and support all students to learn and thrive. (p. 9)

Measures of progress in the new strategy for “equity and excellence” largely pull from existing data to assess outcomes in: foundations in literacy, numeracy and digital literacy; subject grades; child development upon starting reception; earning and learning pathways after leaving school; and students leaving and joining public education, between different student groups (particularly Aboriginal learners, learners with disabilities, learners who face economic disadvantage, learners living in regional and remote Australia, and children in care).

Successful completion of secondary schooling in SA is recognised through the achievement of SACE (the South Australian Certificate of Education), typically undertaken in the final two years of secondary schooling. A new future-focused SACE was rolled out in 2009 to increase student retention and better align with broader future-employment focused skills. In 2024 South Australia implemented its own curriculum, from the Australian curriculum, to enhance its public education strategy in years 7-10 (to also be more aligned with SACE).

4.5.2 Funding

Both government and private schools receive a mix of federal and state public funding. Nearly all non-government schools are fully funded according to an agreed funding standard, most government schools remain underfunded (Cobbold, 2024). This funding inadequacy as well as other policies and practices that favour privatisation and marketisation (e.g. parental school choice) of education in Australia is an issue that is well documented by Australian education researchers as exacerbating unjust inequalities in the Australian education system(s) (Blackmore, 2007; Di Gregorio et al., 2025; Perry, 2025). One related situation is the increasing concentrations of students from more traditionally socioeconomically disadvantaged backgrounds in public schools that lack sufficient resources.

The national *Better and Fairer Schools Agreement* 2025-2034 intends to fully fund all public schools to the adequate standard by 2034. However, Kenway and Boden (2025) argue the agreement fails to go far enough to address systematic funding unfairness and inequality between the public and private school education sectors. Without funding public schools sufficiently and fairly, the promise made in the *Alice Springs (Mparntwe) Education Declaration* for “equity and excellence” cannot be fully realised in Australia (Sahlberg & Cobbold, 2025).

4.5.3 Third Party Engagement

South Australia has not directly engaged with the OECD, like Scotland. South Australia did engage directly with McKinsey & Company, a private multinational consulting firm, to develop a public education improvement strategy. That strategy *From Good to Great: Towards a World-Class System (2018-2022)* aimed to gain world class status according to the OECD's PISA (and TIMSS and PIRLS) rankings. Rather than providing advice more broadly for how to enhance equity and quality in education, like the OECD itself had done in its evaluations for Scotland, McKinsey's world class agenda focused more on narrow outcomes.

A goal set in 2013 for Australian education nationally was also to be ranked high on PISA. Since PISA only assess 15-year-old students in reading, math and science literacies triennially, South Australian education focused heavily on the National Assessment Program - Literacy and Numeracy (NAPLAN) that runs in years 3, 5, 7, and 9 as indication of progress towards higher PISA results.

Mader (2024, p. 47) notes the “world class” strategy coincided with the South Australian Department for Education taking a “NAPLAN-obsessed” direction to performance, noting this was “dangerously reductive and simplistic.” Additionally, Mader describes that the world class strategy “signalled how outsourced knowledge was now valued

more than the professional knowledge” (Mader, 2024, p. 219). As Bills and colleagues describe (2024, p. 33):

The World Class agenda came at the end of a two-decade standards-infused transformation of the South Australian public education from a once high professional trust system in principal and teacher judgement... education was too important to be left to educators to respond to local needs and needed the hard cold efficiency and effectiveness of business acumen. In relying on a “single source of truth” with “a laser sharp focus,” [NAPLAN] the Department ignored the children and young people that it was purportedly serving. Inequity and how it worked in schools was silenced.

The new *Our Strategy for public education in South Australia*, was developed in part through input from diverse interest-holders, including teachers, learners, communities, and international education reform leaders, taking a more participatory approach. Compared to the preceding “world class” agenda, the new strategy is aiming to do things differently by placing more value on professional knowledge and broader metrics of success for equity and quality (or systems excellence).

Having outlined the education system and equity background contexts in Scotland and South Australia, the next section describes the methods used to investigate policymakers’ understandings of equity in these two education systems.

4.6 Methods

Scotland and South Australia are systems that are both prioritising equity in education, as apparent from the evidence outlined above. Both systems agreed to grant approval for me to recruit current senior education system policymakers from their systems to explore conceptions of equity in education. I initially used desktop research to target key senior education system policymakers. After receiving the appropriate ethics approvals I refined my potential participant lists in each location by consulting with key contact people suggested by

senior level officials in each location to help me with finalising participant recruitment. The prospective participant pools in each location were relatively small and finite. I sent recruitment emails to ten policymakers in Scotland and eight in South Australia. The recruitment emails explained that participants would be asked to individually respond to 1-2 questionnaires that should take no more than 30 minutes to complete and to participate in a workshop with their colleagues lasting approximately 1.5 hours. Only one questionnaire was actually administered for this study.

Seven policymakers in Scotland agreed to participate. In the end, five Scottish policymakers completed the pre-workshop questionnaire and five participated in the workshop. I led the workshop that took place in September 2024 at a main Scottish Government building in Edinburgh. I conducted one semi-structured interview in October 2024 virtually with a Scottish policymaker who was unable to attend the workshop in Scotland. Five policymakers in South Australia initially agreed to participate, and all five completed the pre-workshop questionnaire and participated in the workshop that I led in October 2024 at a South Australian Government building in Adelaide.

Both the questionnaire and workshop focused on ideas about the meaning of equity in education, as well as policies and practices aimed at addressing equity in education, particularly regarding their education systems. The workshops were audio-recorded and transcribed. I used an interpretive, thematic approach to manually code and analyse the resulting empirical data (Braun & Clarke, 2006; Yanow & Schwartz-Shea, 2015). Consent was obtained from all participants under the conditions of anonymity. The Human Research Ethics Committee at the University of Melbourne and the Department for Education in South Australia granted approval for this data collection in 2024.

4.7 Data Analysis

What follows are three main findings from the empirical data collected as outlined above from senior policymakers in Scotland and South Australia. I chose to focus this article on these findings with the hope that they might be helpful for education system policymakers and leaders to consider regarding aims to enhance equity in education. Limitations of this study include its non-fully representative sample, data reflecting only certain points of time, and the possibility that participants moderated their responses due to political or professional considerations.

4.7.1 Policymakers in the study did not have consistent conceptions of what equity in education means, even within the same jurisdiction

One finding from what policymakers had to say about equity in education in Scotland and South Australia was that they had different understandings of what equity in education means. This difference was found between the two systems and even amongst policymakers within the same system.

In Scotland, despite all policymakers individually feeling they had a clear understanding of what equity in education means, there was variance in how they defined it. For example, Scottish Policymaker 1 described it as "a principle of fairness that aims to provide all children and young people with what they require to develop the skills and knowledge that will ensure they achieve their potential and contribute fully to society." Scottish Policymaker 3 connected the concept to joy, for example, defining equity in education as "addressing disadvantage directly in order to... support individuals to thrive and find joy in learning." While Scottish Policymaker 5 understood equity in education to mean "equality of opportunity to learn, progress and succeed." Regarding how equity in education is understood at the system level, Scottish policymakers described that the SAC and the

OECD were particularly influential and as a result, at the system level, equity in education was largely understood as addressing the “poverty related attainment gap.”

South Australian policymakers in the study did not unanimously feel they had a clear individual understanding of equity in education. South Australian policymakers understood equity to mean different, nuanced, and complex ideas connected to breaking the link between socioeconomic background and education outcomes for every learner. As South Australian Policymaker 1 put it, “I don't think that there is a particularly coherent or common understanding of equity.” Some South Australian policymakers highlighted two aspects of equity in education, for example:

There are two parts (1) outcomes (skills/dispositions/experiences/post school pathways) we expect every (or almost every) student to have. (2) outcomes (skills/dispositions/post school pathways) we expect to be unrelated to (not conditional on) students' circumstances or background (e.g. who they are, vulnerability upon starting school, etc).

South Australian Policymaker 4

An overwhelming sense from the South Australian policymakers was that they were, as system leaders, reflecting on how they were understanding equity in education, what it means and what it should mean. South Australian policymakers described being open to and considering that what equity means to them might not exactly be the same as what different communities in the system would want. For example, they noted that at the system level they were thinking a lot about how to: “differentiate (between communities, schools, individuals) but not expect less” and “appreciate that people might not value the same things.”

4.7.2 Senior policymakers in the study wanted more effective translation of the idea and aims of equity in education into policies and practices

Another main finding from policymakers in the study was that despite many existing system level policies and practices aimed at addressing equity in education, there was a desire in both places for more effective translation of the idea and aims of equity in education into policies and practices to support improved equity. In Scotland, policymakers described how the system level aims to address equity in education by a vast constellation of policies and practices. As Scottish Policymaker 5 said, "equity just seems to be there as a major core of everything that's trying to be done." Examples of "everything" included universal free school meals in early primary years, clothing grants, the 1140 hours of early learning and childcare entitlement, and the National Improvement Framework. Additionally, it was mentioned that the *CfE* is designed to enable equity and that:

where it's delivered well, there's a broad and varied curriculum that enables young people to achieve their fullest potential... That the breadth of the curriculum is a big part in keeping young people engaged in school and opening pathways on to whether it's university or college or a good job.

Scottish Policymaker 2

Nevertheless, there was acknowledgement that the SAC (Scottish Attainment Challenge) stood as the most recognisable initiative or the "flagship" equity policy. Scottish Policymaker 6 brought up that "phrases like flagship policy... tilt this perspective away from the 97.5% of what we spend on education towards the 2.5% that happens to be additional."

Yet, in Scotland, there was indication from the policymakers that while equity being at the core of 'everything' that's trying to be done is the policy intention, the reality is that, as Scottish Policymaker 5 put it, "we write quite clearly in a lot of our documents... and then we kind of fudge it quite a lot in terms of how to actually move that (equity) forward." Scottish policymaker 5 felt a reason for this disconnect is due to a lack of culture within the system of "sharing knowledge and good practice around the system and... (a need for) more peer

sharing of good practice.” A similar sentiment was expressed several times throughout the workshop. Another reason for this lack of clarity that came up in the workshop was due to (Ministers and the system level) having too many equity priorities, implying a lack of clarity for where to focus action and efforts.

In South Australia, policymakers also described a myriad of system level policies and practices aimed at enhancing equity in education. Policies and initiatives included the Country Education Strategy, the 20 Year Infrastructure Plan, inclusion policies, and investment in the early years, amongst others. A practice largely referenced was incorporating and iterating system level policies and practices based on feedback loops with relevant stakeholders.

The new strategy for public education was indicated by some South Australian policymakers as the “clearest example” of how current policies are addressing equity in education, with one policymaker explaining that in the policy:

we’re actually considering equity in and of itself in a range of different areas rather than as a means to get something else and that is hugely powerful because you actually start to have those [reflections about] what does that look like?

South Australian Policymaker 3

Despite lack of clarity on what equity in education means, South Australian Policymaker 4 expressed that what is needed to improve equity in education (outcomes) is not more “wordsmithing an agreed kind of definition of equity,” but rather just “actually us doing our jobs and creating it in the system.” Still, there was acknowledgement of room for improvement in terms of consistently doing the job of incorporating equity into policy and practice. As a South Australian policymaker reflected in the workshop:

if we think of equity as removing barriers, we actually have to understand what those barriers are first and then you can design interventions and I think that’s part of the

challenge with equity generally and we are not immune from it here, is it's the understanding of a consistent application of that in all that we do and we're good at it in some parts and we intentionally design for it but we're not as good at it in other parts and we don't.

South Australian Policymaker 2

Additionally in the South Australian workshop, South Australian Policymaker 4 ventured that what equity means in practice has been “a stumbling block for all Australian jurisdictions.” All policymakers in Scotland and South Australia acknowledged that their education systems were not entirely equitable.

4.7.3 Senior policymakers in the study thought a more holistic approach to equity in education would help support a more equitable future

When I asked policymakers about their ideas related to how their education systems could be more equitable in the future, policymakers in both Scotland and South Australia talked about taking a more holistic approach to equity in education. Policymakers in both jurisdictions described how the public education system and schools are increasingly encountering the need to take on progressively broader and more complex holistic needs of students. As South Australian Policymaker 3 said “and we see that in various different ways, and that forces us to think about what we're doing in public education differently, because it's, it's a broader trend brought about by kind of macro conditions and national system policy that we have to counter and think about.” In Scotland and South Australia policymakers noted that other public agencies used to take on some of those aspects (e.g. health and social services) more than they are now due to funding cuts in those other areas. A South Australian policymaker brought up Maslow's hierarchy of needs as something schools are now needing to make sure are addressed for all students, while Scottish policymakers talked more about the cost-of-

living crisis and lack of middle-income job availability as broader aspects exacerbating inequities in education.

Policymakers in both locations described challenges relating to health, poverty, and wellbeing as aspects outside the traditional remit of school education that should be considered more in the future for greater equity in education. Relatedly, policymakers in both Scotland and South Australia saw a future way to improve equity in education is to work more collaboratively across sectors no matter the "government of the day" and both pointed out that education cannot tackle inequities in education alone. One consideration that the South Australian policymakers brought up is addressing the structural funding inequity "that occurs across the sectors."

Policymakers in Scotland discussed whether equity in education should be considered in a way that is broader than the "poverty related attainment gap" and literacy and numeracy outcomes. Ideas around considering different student groups as well as health, wellbeing and student empowerment as outcomes were put forth. One Scottish informant pointed out that health and wellbeing are core elements of the curriculum but that they are essentially left to the schools to monitor and assess because system level or national metrics are non-existent and/or have been controversial. Some Scottish policymakers contended literacy, numeracy, and other existing indicators were good enough at the system level to be able to infer about broader holistic aspects. Scottish Policymaker 5 put forth "that the basic principles (regarding system level understanding of equity in education) of the last sort of decade have been the right ones," while also highlighting the need to look at the different indicators of improvement or progress at the system level versus at the school level. Scottish Policymaker 5 explained "...the NIF indicators are very high level...everything else has to be more relevant to what you're trying to achieve locally, which goes into the improvement work and

understanding the needs and abilities of your kids and what they're trying to achieve." In South Australia, a policymaker brought up that:

...as our strategy evolves, we're trying to look at outcomes in every learner from a more holistic perspective, So thinking about things like agency and the kids learning, things like well-being, things like how effectively they learn. Now, we'll have a natural evolution over time or at least that's our intention, and that's what we're building towards to look at the student more holistically. So, I think as the strategy evolves, and as our understanding of some of those metrics at both the student, site, and system level evolves, that will also adjust how we look at the metrics of the thing (equity).

South Australian Policymaker 2

In keeping with the spirit of the quote above, in South Australia, policymakers spoke about broad student experiences as a broader point of equity that should be considered more (for example, experiences like art, music, and outside of school experiences). Scottish and South Australian policymakers suggested more holistic equity considerations should also include children's 0-5 experiences and outcomes as well as post-school completion pathways. These broader and more holistic equity ideas from the policymakers were linked into thoughts about "excellence," recognising and considering that communities, groups and even individuals contexts could warrant different conceptions of excellence in education as well. As Scottish Policymaker 3 put it "actually I think we're going to have to think about what we mean in that excellence space."

4.8 Conclusions

The exploration of the sample of policymakers' conceptions of equity in education in this article supports the assumption that when policymakers talk about equity in education, they are not necessarily talking about the same concept. Many policymakers put a great deal of

effort into equity related policy work, but if what equity means varies or is unclear, all the endeavours likely will not have the impact on practice that they hope.

One suggestion from the findings from this study is that policymakers in a system have a clear consensus on what equity in education means. A related proposition is that this clear consensus is articulated in a concrete and operational way that remains coherent throughout changes in government. This proposition is echoed as a recommendation from the International Council of Education Advisors to the Scottish Government (Scottish Government, 2023), with the specific advice that:

The Scottish Government should define, in collaboration with key stakeholders, equity and excellence in education in coherent ways so that it would better serve improving policies and practices, sharpen the monitoring frameworks, and establish clear lines of accountability.

Strategic Area 7

In Federal systems like Australia, it might be that the role of the Federal Government would be to coordinate the definition and understanding of equity amongst the different jurisdictions to achieve equity in education, as per the *Alice Springs (Mparntwe) Education Declaration (2019)*.

Another recommendation from the data analysis in this article is that the clear consensus on what equity in education means considers the concept in a broad and holistic way. A method to ensure that broader definitions do not result in being overly vague and out-of-scope, is to make sure that there are well-thought out, corresponding monitoring frameworks and accountability arrangements. There can often be a mismatch between lofty equity goals, and narrow and insufficient accountability and monitoring frameworks (UNESCO Institute for Statistics, 2018). While some might say that narrow metrics are fine if there is understanding that the inputs and practices to improve them equitably are considered

in broad ways, many more might agree that it is what is measured and what people are held accountable for that is prioritised.

A holistic approach to equity in education would evaluate equity in a clear way, against whole of curriculum and purposes of school education outcomes that consider the present with an eye to the future. Recently (2021) UNESCO's *Reimagining Our Future Together: A new social contract for education* updates the need and vision for a more humanistic, human rights, and holistic approach to education, particularly for our uncertain futures.

As described at the start of this article, it is not just Scotland and South Australia that desire improvement regarding equity in education. According to OECD data, inequity in education is a relentless global trend. When the meaning of equity in education remains unclear, it is not surprising that very little progress if any has occurred in making education in OECD countries more equitable over time. Improving the conception of what equity in education means in national and sub-national education systems does also not necessarily mean adopting a definition off the shelf. Of course, a perfect definition would not be a magic bullet for improved equity outcomes, but a better and clearer conception is a foundational area that this exploration suggest warrants more attention and consideration.

It should be acknowledged that some policymakers may find ambiguity around equity useful, for example, for flexibility or consensus building. Some policymakers might also be reluctant to adopt a clearer definition of equity because achieving it under that definition seems impossible. However, that kind of ambiguity can dilute accountability and limit real progress. In conclusion, clearer progress of equity in the future will more likely happen if there is better understanding of what equity in education means.

Chapter 5. Equity in Practice: School leaders' perspectives in Scotland and South Australia

This chapter is presented as the author-submitted manuscript of an article that was published in *School Leadership & Management*, Volume 2, 2026.

<https://doi.org/10.1080/13632434.2026.2637970>

5.1 Abstract

Education systems worldwide position equity as a central policy objective, yet its advancement depends heavily on school-level interpretation and enactment. This article examines how school leaders understand and operationalise equity within the constraints and opportunities of their policy environments. Drawing on qualitative interview data collected in Scotland and South Australia, the study finds that despite differing policy architectures, school leaders across both systems conceptualise equity as a dynamic, context-responsive commitment to meeting diverse student needs rather than a fixed or standardised principle. This fluid understanding enables leaders to navigate limited or inconsistently allocated system resources by exercising professional judgement to prioritise support for students' different needs. However, the variability in both conceptions and enactments of equity highlights a misalignment between system-level policy intentions and school-level realities. The study identifies three structural conditions: definitional ambiguity, resource inadequacy, and metric misalignment, that help explain persistent gaps between system-level equity intentions and school-level realities. The article argues that more coherent, shared frameworks for defining, measuring, and monitoring equity across system and school levels that align with the complex realities of school life could strengthen the capacity of education systems to advance equity in more meaningful and sustainable ways.

5.2 Introduction

Education systems around the world have increasingly prioritised equity in education as a core policy aim, in part due to the Organisation for Economic Co-operation and Development's (OECD's) position that the highest performing education systems are those that combine high-equity and high-quality (Senior & Sahlberg, 2025). Although equity in education is frequently referred to in policy documents, there is no universally agreed definition of what equity means or what it looks like in school practices (Appels et al., 2023; Cairney & Kippin, 2022; Edgar, 2022; Harris & Jones, 2019; Levinson et al., 2022; Lingard et al., 2014).

Ideas about what equity in education means and how it can be better addressed have evolved alongside advancing research, changes in society, and shifting ideas about the purpose of school education, amongst other factors. A widely held view is that an equitable education system is one in which disparities in student outcomes are not unjustly patterned by factors such as socioeconomic status, geographic location, gender, ethnicity, or disability. While no system has fully realised that vision, some systems and schools have made more progress than others (Adamson et al., 2016; Downey & Condrón, 2016; Jennings et al., 2015; Sahlberg, 2023; Senior, 2021; Wilson & Fergus, 1988). Harris and Jones (2019, p. 391) suggest “moving away from the language of policy to the reality of making it (equity in education) happen means looking far more closely at the work of those who lead in schools.” However, long-standing research continues to show that out-of-school factors largely relating to a child’s socioeconomic background and community contexts remain the most powerful explainer of variability in student achievement in school, with children from traditionally less advantaged socioeconomic backgrounds generally achieving lower outcomes than their more traditionally socioeconomically advantaged peers (Alexander & Morgan, 2016; Coleman, 1966). The 2022 PISA (OECD, 2023) data show that in OECD countries advantaged students (top 25% socio-economic status) scored about 93 points higher than disadvantaged students (bottom 25%) in mathematics that is equal to over three years of schooling.

Within this context, school leadership can play a key role within schools to influence more equitable student outcomes (Grissom et al., 2021). As Hart, DeMatthews, and Gümüş (2025, p. 1) note, school leaders “are crucial in establishing equitable and impactful schools that meet the diverse needs of all students.” It is school leaders who, as Molla and Gale (2020, p. 858) put it, “use policy as an opportunity to advance what they think is achievable within the limits of available resources” regarding equity in education. Yet, although a growing body of literature examines leadership for equity and/or related concepts, much of it

remains either largely theoretical or focused on particular student groups or specific interventions (e.g. Berkovich & Eyal, 2021; Keddie, 2015; Scanlan and López, 2012; Tippet et al., 2023).

Despite this attention, there is limited empirical research on how school leaders understand, interpret, and enact system-level equity policies in their everyday work. One example is Savage's (2013) study of how equity was understood in two different Australian schools, which illustrated that what equity means and how that meaning is enacted is mediated within specific school contexts, (that study, however, did not focus particularly on school leaders). Another study (Ainscow & Chapman, 2025) that was conducted in the City of Dundee in Scotland focused on developing cultures that embrace innovation and school leadership through working together and employing inquiry-based approaches to the development of practice. One of the main findings in that study was that schools need to be supported to make meaning within local contexts about equity before they can change practice. This means that the communities of practice within and between schools "may well negotiate local meanings for those agendas that are different from those of the formulators themselves or, indeed, of other local schools" (Ainscow & Chapman, 2025, p. 391).

These and other studies (e.g. Ainscow, 2015; Dunham, 2025) highlight an important issue regarding school level enactment of equity policies: a lack of a commonly understood and operationalisable definition of the term. Our ongoing study that this paper is part of, also identifies a lack of common understanding of equity in education at the system level (Senior, 2026). Yet less well understood is whether the challenges school leaders face in enacting equity are specific to particular policy contexts or reflect more general patterns in how equity policies travel from system to school. This article addresses these dynamics by examining how school leaders conceptualise equity and how they perceive, translate, and enact system-level equity policies. We use qualitative data collected from Scotland and South Australia:

two systems that have placed equity at the centre of their education improvement and reform agendas. Our examination offers three key insights. First, we show that cross-system convergence, rather than difference, characterises how equity is understood and enacted at the school level. Despite their different policy architectures, leaders in both Scotland and South Australia describe strikingly similar experiences. Second, we extend policy enactment scholarship by demonstrating how equity functions less as a policy to be implemented and more as a professional orientation that leaders must continually construct within conditions of resource scarcity. Third, we identify specific structural conditions: definitional ambiguity, resource inadequacy, and metric misalignment, that help explain why equity-oriented reforms so consistently stall at the school level, regardless of system design.

5.3 Policy enactment and leadership for equity

Unequal schooling outcomes among different student groups and what is causing them has been systematically researched since the 1960s. School effectiveness research since the 1970s has also highlighted leadership as a key factor affecting school effectiveness and school improvement (Edmunds, 1982; Huber & West, 2002). More recently, global scholarship on school leadership has focused on social justice, moral, ethical, and culturally responsive orientations in education development (e.g. Ehrich et al., 2015; Hart, DeMatthews & Gümüş, 2025; Khalifa, Gooden & Davis, 2016). This literature positions equity not only as an outcome but as a guiding principle for leadership practice in diverse, and complex school and system contexts (e.g. Courtney et al., 2018; Ward et al., 2015).

However, school leaders do not operate in a vacuum. Their efforts to promote equity are shaped by system-level policies and structures, particularly accountability mechanisms and resource allocations. School leaders must interpret these policies and determine how to enact them within the constraints and possibilities of their school contexts. This process is

often described as policy enactment (Ball et al., 2011; Orchard et al., 2025; Singh et al., 2013). As Dadvand (2024, p. 1242) describes:

policy enactment is a contested process and requires decision-making that involves receiving, making sense of, translating, and narrating what policy stipulates. Policy ideas and expectations are rarely taken up as intended, and their implementation becomes conditional upon the resources and opportunities within schools.

From this enactment perspective, school leaders are not merely implementers of policy but active policy actors whose professional judgement shapes how system-level intentions are realised (or not) in practice. Accordingly, earlier studies show that equity policies are enacted differently across schools depending on local contexts, community values, and leaders' interpretations (Andreasson et al., 2015; McKay, 2018; Riddle & Cleaver, 2015; Savage, 2013). Work by scholars such as Rezai-Rashti and Singh further demonstrates that leadership enactment is contingent, negotiated, and deeply contextual (e.g. Rezai-Rashti et al., 2024; Singh et al., 2013), with other scholars pointing out that system level policies can overlook the importance of school level contextualisation (e.g. Hickey et al., 2022). These findings underscore a key insight: understanding equity in education requires attending not only to policy design but to the interpretive work through which leaders translate policy into practice.

A complementary strand of empirical research identifies leadership practices associated with more equitable outcomes (Day & Sammons, 2016; Leithwood, 2021; Shields, 2010). Four key insights from this existing research are particularly relevant to this study. First, school leaders play a decisive role in translating equity policy into instructional improvement. Across OECD analyses and the wider leadership literature, equity-oriented policies achieve their intended effects only when leaders convert them into concrete changes in classroom practice (Leithwood, Harris, & Hopkins, 2020; OECD, 2016; 2020). This

includes prioritising high-quality teaching, targeting learning support to students experiencing disadvantage, and using evidence to monitor progress over time. Studies from Scotland's Scottish Attainment Challenge and Australia's post-Gonski reform agenda illustrate that autonomy and targeted funding alone do not reduce inequities; rather, it is leaders' capacity to align resources, professional learning, and instructional focus that determines impact (Australian Government, 2018; Scottish Government, 2023). In enactment terms, this suggests that equity policy is not self-executing: it requires active translation by leaders who must make judgements about how to convert policy intentions into instructional realities.

Second, the successful enactment of equity policies depends on distributed leadership and collaborative cultures rather than individual leadership capacity. Research consistently shows that leadership for equity is collective work within and between schools in education systems. Leaders who build collaborative cultures, strengthen middle leadership, and foster professional learning communities are better able to ensure that equity-oriented practices reach all classrooms (Grissom et al., 2021; Hargreaves & O'Connor, 2018; Harris, 2004). OECD TALIS findings highlight strong associations between distributed leadership, teacher collaboration, and positive professional climates that are conditions that are particularly important in schools serving diverse and high-need communities (OECD, 2019; OECD, 2025). In Scotland, evidence from the School Improvement Partnership Programme indicated that schools can be more effective when headteachers mobilise shared responsibility and professional judgement, supported by networks across schools and local authorities (Chapman et al., 2016). A recent study of headteacher utilisation of funding to improve student outcomes in Scotland concluded that increasing the capacity of networks at the local and national level could support improved application of funds (Firth et al., 2025). Australian research (Goode et al., 2023; Hardy, 2015; Vaughan et al., 2026) similarly emphasises that

leaders' interpretive work (i.e., how they make sense of policy in context) can benefit from collective expertise and staff trust.

Third, the impact of school leadership on equity is strongly shaped by system conditions, including coherence of policy priorities, adequacy of support, and capacity at the middle leadership tier. OECD implementation research stresses that policy design must be matched with attention to delivery conditions. Where systems devolve responsibility without sufficient guidance, resourcing, or professional learning, school leaders often respond with compliance-oriented behaviours that undermine equity goals. Enactment research characterises this as situated implementation shaped by the surrounding governance and support infrastructure. Across different contexts, policy coherence is not an intrinsic feature of reforms but something leaders and staff must actively construct from often complex and competing conceptions and practical interpretations. Research shows that principals influence whether teachers interpret equity-oriented initiatives as learning-focused improvement or as episodic compliance, by shaping access to ideas, structuring professional dialogues, and creating conditions for teacher learning (Coburn, 2005; Spillane et al., 2002). Classic implementation studies (e.g., McLaughlin, 1987) further underscore that local enactment depends on school leader agency and on whether policy design is matched with usable support and learning opportunities. When these are absent, school leaders often adopt coping strategies that prioritise compliance and risk minimisation over deep instructional change. Recent international education system research argues that strengthening the middle leaders' data literacy, professional support, and improvement capacity is a core lever for improving outcomes at scale.

Fourth is the role of accountability. External accountability regimes can either enable equity improvement or generate fragmentation as comparative research on school inspections reveals cross-national "side effects", such as strategic behaviour, narrowing curricula, stress,

and short-termism, while accountability literature reviews show how high-stakes incentives can encourage triage and uneven attention to student groups (Ehren et al., 2016; Fahey & Köster, 2019; Torres, 2021). From an enactment perspective, accountability frameworks do not simply measure equity outcomes, they actively shape what equity can become in practice, by signalling which outcomes matter and which remain invisible.

Taken together, the available evidence suggests that school leaders can be pivotal actors in advancing equity, but their impact depends on both professional capability and enabling system conditions. Policies aimed at improving quality and equity are most likely to succeed when leaders are supported to focus on instructional improvement, cultivate distributed, collaborative expertise, and operate within coherent systems that prioritise learning over compliance. Yet what remains less clear is whether the challenges leaders face in enacting equity are specific to particular policy contexts or reflect more general patterns. In what follows, we address that question by comparing leaders' experiences across two distinct systems.

5.4 Methods

This study utilises a comparative case study and qualitative approach to examine how school leaders understand and enact equity across two distinct yet comparable policy contexts: Scotland and South Australia. Comparative case-oriented approaches are regularly used to enhance understandings of educational policy and practice (e.g. Arnove, 2009; Crossley & Vulliamy, 1984; Rivas, 2022; Volckmar, 2018). According to Wiseman and colleagues (2025 p. 5) “the evaluation of education policy can be both reflected and instructed by comparative education, elaborating or analysing implicit and explicit criteria for evaluation.” For the purpose of this study, Scotland and South Australia were chosen as the comparative case studies because both systems are explicitly prioritising equity in education for system

improvement, yet advancing equity in education remains a challenge in both places. That disconnect between policy aims and realities suggests better understanding or “reflection” of equity policy enactment in both places could provide fresh insights regarding how equity related policy and practice could be improved particularly in Scotland and South Australia. They both are English-speaking OECD countries with inherited characteristics and cultures from the British education traditions, yet they differ in governance arrangements, funding mechanisms, and accountability structures. Those similarities and differences between Scotland and South Australia make them ideal cases for comparison. We chose a qualitative case study approach for “its ability to investigate complex social phenomena” (like equity in education and policy enactment) (Glette & Wiig, 2022, p. 1377). By comparing leaders' experiences across these contexts, we aim to distinguish between challenges arising from specific policy designs and those that may be more structural, thereby generating findings with relevance beyond either single system, in line with a case study approach (e.g. Eisenhardt & Graebner, 2007; Gerring & Cojocaru, 2016; Harland, 2014). We next detail the school leadership and equity context in each system, and then proceed with the methods.

5.4.1 School leadership and equity context in Scotland

The Scottish education system has developed over time, while maintaining an ethos from the eighteenth-century ‘Scottish Enlightenment’ (Bryce et al., 2018). Though part of the United Kingdom, since devolution in 1999, Scotland’s own government has legislative responsibility for education (as well as health and other public services). Most children attend public schools administered by one of the 32 local authorities. As such, “the Scottish education system is different from other parts of the United Kingdom, particularly England” (Chapman et al., 2018, p. 13). Within this governance structure, equity and excellence are articulated as

the main overarching aims for Scottish education, as set out in the National Improvement Framework (NIF).

The Scottish Government has invited the OECD to review its education system three times, in 2007, 2015 and 2021. Each review has highlighted positive aspects of the system, as well as areas for improvement, including better addressing equity in education, particularly to improve outcomes for children “from the most deprived areas” (OECD, 2015, p. 69). Equity has become increasingly defined through a policy focus on reducing disparities in educational outcomes linked to socioeconomic disadvantage, particularly those associated with child poverty, regularly referred to in Scotland as the *poverty-related attainment gap (PRAG)* (e.g. Sosu & Ellis, 2014). As Firth, Beck and Wilson (2025, p.2) put it:

This poverty-related attainment gap and associated concerns about rising levels of child poverty have become powerful drivers of education reform in Scotland, with a plethora of policies and interventions being developed to tackle it.

A main policy response to the poverty-related attainment gap has been the Scottish Attainment Challenge (SAC), initiated in 2015.

The SAC operates through various funding streams, most notably Pupil Equity Funding (PEF). Uniquely, PEF directly provides headteachers with “additional” funding to address the PRAG based on the number of pupils registered for free meals in their school. Headteachers have discretion over how PEF is used, reflecting a policy idea that school leaders are best placed to decide how to utilise funding to address the PRAG within their context. SAC and PEF continue to date. Since its introduction in 2017, the “additionality” of PEF funding has been questioned, for example, the current Cabinet Secretary for Education and Skills of Scotland expressed concern that SAC funding “is too often being used to plug gaps in non-education services that have arisen due to budget cuts” (Seith, 2025).

As part of the “school empowerment” reform agenda that started in 2017, the trend of focusing on the role of headteacher to close the PRAG continues (Donaldson, 2010; Scottish Government, 2019). This “empowerment agenda” has been “criticised for placing more responsibility and accountability on the shoulders of headteachers rather than truly empower them” (Harvie et al., 2024, p.2). Scottish Government programs like *Into Headship* aim to help develop aspiring headteachers’ leadership capacity and expertise (Education Scotland, 2026).

Based on the recent OECD (2021) review, Scotland is reorganising its education system inspections and qualifications structures that largely adhere to traditional accountability frameworks particularly in senior secondary school (e.g. exams), despite a more holistically focused comprehensive curriculum (the *Curriculum for Excellence*). Recent reviews instigated by the Scottish Government as well as findings from academic research have suggested that Scotland’s traditional qualifications structures have stifled equity efforts (e.g. the Independent Review of Qualifications and Assessment, 2023) and put “performative” pressure particularly on headteachers (Cook, 2015).

5.4.2 School leadership and equity context in South Australia

The South Australian education system has a history of “prioritising social justice” (Collins & Yates, 2009, p. 125). However, like in the rest of Australia, European arrival in South Australia dispossessed and disenfranchised local Indigenous populations, which has created suffering and inequities that persist to date. Though the Government of South Australia has responsibility for public education, over the past several decades, the Federal government has become more involved in steering education policies and initiatives. The Education Revolution in the late 2000s and early 2010s pursued under the Rudd–Gillard governments marked a significant shift towards national coordination, introducing a national curriculum,

national school leadership standards, and a national assessment and accountability framework (National Assessment Program - Literacy and Numeracy, administered to Australian students in Years 3, 5, 7 and 9 (NAPLAN)). Equity is a main national aim for Australian education, as per the 2019 *Alice Springs (Mparntwe) Education Declaration* and the *Better and Fairer Schools Agreement (2025-2034)*, both as signed by all Australian states and territories.

Unlike in Scotland where most children attend public schools, one third of Australian children attend private school. The Federal government provides the majority public funding for private (non-government) schools and states provide the majority public funding for public schools (government schools) (Sinclair & Brooks, 2024). All schools are expected to be funded according to the schooling resource standard (SRS), which is “an estimate of how much total public funding a school needs to meet its students’ educational needs” (Australian Government, n.d.). However, public (government schools) that increasingly comprise higher concentrations of more socioeconomically disadvantaged students continue to be underfunded according to the SRS (Sahlberg & Cobbold, 2025). That underfunding means the children with the most need who would most benefit from adequate and increased school funding are being systematically additionally disadvantaged (Cobbold, 2025; Kenway & Boden, 2025). Equity has become increasingly articulated in Australian education policies as the SRS funding allocations for certain categories of students as well as the differences in outcomes (namely NAPLAN results) between different student groups (e.g. Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander students, and students from more regional and remote areas compared to students from metro areas) (Di Gregorio, Mulcahy, & Gerrard, 2025).

Similar to the empowerment agenda in Scotland, school autonomy has been pushed in varied ways in Australia as an education improvement initiative with “mixed effects” regarding equity (Keddie & Holloway, 2020, p.289). The mixed effects are associated with

the corresponding high levels of centralised accountability and compliance, resulting in the paradoxical task of a school principal in Australia having to navigate “performative priorities (e.g. improving NAPLAN results) with equitable practices” (Dadvand, 2024, p. 1247; Goode et al., 2023). A recent report on principals’ practice based on 50 interviews with public school principals in South Australia found “in a marketised school environment, principals are increasingly concerned about reputational risks, unfavourable conditions of school choice and competition and the negative impacts of data-led comparisons” as well as “principals describe a significant challenge in navigating outside policy demands and claim these demands often impede their ability to address the unique needs of their local communities” (Dolan et al., 2024, p. 15).

Recently, the Government of South Australia has developed *Our strategy for public education in South Australia* that includes equity as a main “area of impact” for education to “unlock every child’s potential now and in the future” (Government of South Australia Department for Education, 2023). Unlike previous strategies (see Mader, 2024), the intention of the new South Australian strategy is to broaden ideas about equity and system improvement to focus more on collaboration, wellbeing, and agency for all in the system, including principals (Fullan, 2025).

5.4.3 Participants and data collection

Qualitative data were collected in 2024 and 2025 from 22 current public school leaders—11 headteachers in Scotland and 11 principals in South Australia, using a combination of focus groups and semi-structured interviews. Participants were purposefully selected to represent primary, secondary, and comprehensive schools across both rural and urban settings. All were experienced leaders able to reflect on equity policy and practice over time.

Focus groups and interviews were conducted virtually, lasting approximately one hour each, and focused on leaders' understandings of equity, their experiences of relevant policies, and their practices in translating system-level expectations into school-level action. All sessions were audio-recorded and transcribed. Consent was obtained under conditions of anonymity; pseudonyms beginning with "A" indicate South Australian participants while those beginning with "S" indicate Scottish participants. Ethical approval was granted by the Human Research Ethics Committee at the University of Melbourne in 2024.

5.4.4 Data Analysis

Transcripts were analysed using interpretive and thematic analysis in NVivo (Braun & Clarke, 2006; Yanow & Schwartz-Shea, 2015). Our analysis focused on identifying patterns and themes that emerged regarding how leaders conceptualised equity, the challenges they described in enacting equity-oriented policies, and the conditions they identified as enabling or constraining their work. Given the comparative design, we attended particularly to convergences and divergences across the two systems.

The findings that follow are organised around three perspectives that emerged from the data analysis consistently across both contexts. Limitations of this study include the use of a respondent sample that is not fully representative, data that capture particular points in time, and the possibility that participants' responses were shaped by professional considerations.

5.5 Findings

What follows are three main findings from the empirical data collected as outlined above from school leaders in Scotland and South Australia. Due to the trend of equity policy enactment gaps globally, and specifically in Scotland and South Australia, we chose to focus

this article on these specific findings with the hope that they might be helpful for education system policymakers and leaders to consider regarding aims to enhance equity in education.

5.5.1 Perspective 1: Equity is a dynamic and contextual concept

School leaders in this study consistently conceptualised equity not as a fixed or uniform principle, but as a dynamic, context-responsive commitment to meeting diverse and changing student needs. Notably, this fluid understanding was shared across both systems. Despite differences in policy architecture, leaders in Scotland and South Australia described equity in strikingly similar terms, as something that must be continually interpreted and enacted in response to students' circumstances, school contexts, and wider social conditions. As Alex in South Australia explained, “if you want me to tell you exactly what my view of equity is, I can't because it changes on a daily basis, based on what I read, what I hear.”

This emphasis on change over time was echoed across focus groups and interviews. For example, South Australian secondary school principal Anne similarly noted that “equity needs of a student can change from day to day, week to week, month to month,” underscoring the temporal and situational nature of equity work. For most school leaders in Scotland and South Australia, equity was therefore not something to be achieved once, but an ongoing process of judgement and adjustment embedded in everyday school leadership practice.

Consistent with this understanding, school leaders described equity as central to their professional role rather than as an additional or peripheral responsibility. Scottish secondary school headteacher Seth was particularly explicit about the immediacy and intensity of this work, stating that “it is our daily role now,” before detailing how equity considerations begin “from the minute a young person walks in (to the school)” including ensuring students are fed, clothed, cared for, and safe.

While school leaders in Scotland and South Australia shared a common view of equity as dynamic and essential, what equity looked like in practice varied considerably in line with how the concept was conceived. They described responding to students' holistic needs in ways that extended well beyond traditional academic attainment, ranging from increasing access to post-school pathways to addressing basic material needs and supporting wellbeing. School leaders in both countries emphasised differentiated support and multiple pathways to success, with Amelia, a primary school principal in regional South Australia, describing equity as education “moving away from a one size fits all model” to create “multiple opportunities to be successful in multiple different ways.”

School leaders in both locations also highlighted the layered and multifaceted nature of equity work. South Australian primary school principal Aubrey characterised equity as “quite layered and there's a lot of levels to it,” encompassing access, differentiation, financial adjustments, and support not only for students but also for staff. Similarly, in Scotland, Stephanie, a headteacher at an urban/semi-rural primary school, described equity as “trying to give each child not necessarily the same experience, but what each child requires,” while a Scottish headteacher at an urban high school, Sylvia, emphasised removing barriers and maintaining “expectations of every child...for the highest possible outcomes.”

Importantly, principals were acutely aware that students' equity needs were shaped by factors beyond the school gate. Several school leaders located inequity within broader social, economic, and system-level conditions. Scott, head teacher at an urban secondary school in Scotland, described inequity as “pervasive across society...beyond school, housing...communities, cities,” emphasising that while education systems must try to mitigate these effects, they operate alongside other systems that also shape young people's lives. Sarah, head teacher of an urban/semi-rural primary school in Scotland, extended this point by highlighting how schools often become the first point of contact for addressing

children's complex social issues within highly localised contexts of generational deprivation and affluence, noting that "a lot of this (starting to address children's complex issues) starts at school level," even though schools cannot address these challenges alone.

This finding highlights that school leaders in both Scotland and South Australia understood equity similarly as fluid, multifaceted, and deeply contextual, requiring constant professional judgement rather than technical compliance. Importantly, this convergence occurred across two quite different policy contexts, suggesting that the dynamic, enacted character of equity work may be a general feature of how equity policies function at the school level, rather than a response to particular policy designs. From an enactment perspective (Ball et al., 2011), equity emerges here as something leaders must continually construct rather than simply implement, a finding that complicates linear models of policy-to-practice translation. This dynamic conception enabled school leaders to prioritise support in response to shifting student needs and constrained system resources. However, as explored in the next finding, this reliance on professional judgement also intensified tensions for leaders operating within inadequately allocated resources, revealing that professional judgement, however sophisticated, cannot compensate for structural constraints.

5.5.2 Perspective 2: Growing challenges with diversifying student needs and inadequate resources

While Perspective 1 establishes that equity is understood as dynamic and enacted through professional judgement, Perspective 2 reveals the conditions under which that enactment occurs: namely, conditions of scarcity. In both Scotland and South Australia school leaders in this study consistently described significant difficulty enacting their understanding of equity (as outlined above) in practice due to constrained resources and increasingly complex student needs. When asked about how they translated system-level equity policies into school

practice, school leaders overwhelmingly framed their role and practices in terms of difficult resourcing decisions. As Anne succinctly put it, the central challenge comes down to “how do we then think about our resources and ensuring you know that we're addressing equity.”

For most school leaders, system-level equity policy was considered at the school level and in leadership practice primarily through targeted funding streams, accountability requirements, and short-term initiatives, which then had to be translated into local decisions about money, staffing, and time. Equity, in practice, became a principle driven by allocating inadequate resources as strategically and ethically as possible. As Alfred in South Australia explained, “you just got to use the funding that you get to put it where it's most needed,” even as leaders recognised that this often meant doing “more with less.” In Scotland, Scott similarly captured this tension, noting that “getting the right resource in the right places is a very difficult thing to do,” particularly in contexts where needs were intensifying faster than support. In both countries school leaders, therefore, experienced equity work in practice less as the implementation of clear policy and more as a continual process of moral and professional judgement about who and what could be prioritised under resourcing conditions of scarcity, a struggle that shaped their daily leadership practice.

PEF featured prominently in Scottish school leaders' accounts of how system-level equity policy is considered and enacted at the school level, described as both essential and increasingly insufficient. For example, Simone, head teacher at an urban primary school, characterised PEF as “invaluable in terms of being able to augment what we can provide in school,” but emphasised that its use required significant reflection and judgement, noting that it was not a simple matter of dividing funds evenly among eligible students. Similarly, Stephanie explained that while PEF was initially understood as “an additional, it was an extra,” it was now increasingly required “to plug gaps here and there” as core budgets declined. Sylvia (head teacher at an urban secondary school), reinforced this point, describing

a context in which “cuts are impinging heavily, and there is no answer to that,” with schools expected to achieve equity even as resources diminished and needs intensified. Sam, head teacher at a semi-rural primary school, captured the cumulative effect of these pressures succinctly, stating, “you don't often have the resources that you would like to have.”

In South Australia, several school leaders highlighted the inadequate public resourcing of public education, particularly in relation to the adequately publicly funded private sector. Austin, principal at a regional primary school, for example, framed equity as inseparable from funding politics and policies suggesting equity depended on “whether or not we're federally funded or state funded appropriately [and] how that money is divvied up across all the schools,” alongside his own responsibility to act as a “moral compass” in deciding where limited funds should be spent. Alfred, principal at a regional/rural comprehensive school in South Australia, described the increasing difficulty of securing support for students with complex needs, stating that schools spend “unbelievable amounts of time to try and get a few crumbs off the table,” only to find that specialist services and staff are often unavailable even when funding is secured. Furthermore, Aubrey similarly suggested that structural underfunding constrained what schools could achieve, noting that “if someone was happy to give me some money, I could really go about doing things differently, and...getting results for kids.” These accounts point to a perception among school leaders that equity work in public schools is shaped not only by internal decision-making, but by broader funding arrangements that systematically limit schools’ capacity to respond to growing and unevenly distributed complex holistic student needs.

Again, what is striking is the consistency of this experience across two different funding and governance systems. Leaders in Scotland, with its local authority model and PEF allocations, described similar resource constraints as leaders in South Australia's state-based system with its distinctive public-private funding divide. In both contexts, equity work in

practice meant navigating inadequacy, making difficult decisions about who and what could be prioritised under conditions of scarcity.

This cross-system convergence suggests that resource inadequacy is not an accident of particular policy designs but a structural feature of how equity reforms are typically resourced. This finding extends existing enactment research by highlighting how material conditions shape the interpretive work leaders can do. When resources are insufficient, professional judgement becomes less about how to pursue equity and more about how to triage within inadequacy, a finding with significant implications for how we understand the persistent gap between equity rhetoric and equity outcomes.

5.5.3 Perspective 3: Narrow measures of student performance may jeopardise more holistic approaches of success

The first two perspectives revealed that leaders understand equity as dynamic and enact it under conditions of scarcity. This third perspective identifies a further structural constraint: the misalignment between how leaders conceive of equity and how systems measure success. Specifically, dominant performance and accountability frameworks constrain schools' capacity to enact equity in holistic ways. Across Scotland and South Australia, school leaders expressed concern that system-level measures of success remained narrowly focused on narrow attainment indicators, particularly in literacy and numeracy, despite growing expectations that schools address a far broader range of student needs. As Spencer, headteacher at a primary school in Scotland, expressed, "we need to have a focus on some of those, more than just those narrow literacy and numeracy side of things." It is worth noting that some school leaders in South Australia expressed hopefulness that the new approach to education in South Australia would value and focus on broader performance indicators of "success," like wellbeing and student progress over time.

Still, as the participants in this study were experienced school leaders having seen initiatives and system leaders come and go, overall, they described a disconnect between what they believed constituted meaningful progress for students and what systems generally recognised as improvement or success. Scott in Scotland, for example, emphasised that the outcomes schools increasingly work toward for children are often indirect and relational, including “feeling better about themselves, having improved efficacy, having improved confidence, better health and well-being.” Yet such outcomes were rarely captured within existing and previous accountability frameworks. Seth, headteacher at an urban secondary school in Scotland, also captured this tension, noting that “it’s the measures that we’re being measured against...that’s a difficulty,” suggesting that school leaders’ equity-oriented work was often rendered incongruent or undervalued by prevailing metrics.

Several school leaders voiced a desire for performance measures that reflected the “whole child” and aligned more closely with their conceptions of equity and related aims. For example, South Australian principal Austin suggested that broader forms of more individualised performance measurement would not only better reflect the reality of equity work in schools, but also support leaders and teachers professionally, stating that “if we’ve got measurements on that person (student) rather than just what that child can achieve in literacy and numeracy...then I can focus on the whole child and see some measures that show improvement. And that for me is equity.” For Austin, and for many leaders in both systems, the narrow metrics that dominated accountability frameworks actively worked against the holistic equity work they saw as essential. He noted that, “NAPLAN for me would probably be a distant last in terms of importance.”

In Scotland, Sandra brought up that to better support equity, broadening performance metrics should also be accompanied by expanded and coordinated supports, including “more multi-agency type supports,” highlighting again the interdependence between accountability,

resourcing, and equity of holistic outcomes, and the limits of what schools can do to holistically support students' needs on their own. Spencer, also in Scotland, further noted that much of the equity work schools invest in, particularly relational, preventative, and wellbeing-focused interventions, unfolds over long timeframes and is “almost impossible to measure” according to a specified timeframe, for example in traditional school improvement cycles. These observations point to a fundamental tension: the outcomes leaders see as central to equity are precisely those that current accountability systems render invisible.

In South Australia, Aubrey described system responses to improving equity in education as “tweaking the edges of the existing status quo rather than doing transformational change (that would be needed to really make a difference),” while Scottish principal Sylvia felt that “the all-consuming drive for attainment outcomes through certain measures poses barriers to real equity and provision of outcome.” Some leaders suggested that longer school improvement cycles, greater flexibility, and a stronger focus on holistic competencies and capabilities, like wellbeing, creativity, and curiosity would better align performance monitoring with more meaningful equity goals.

Alex's account in South Australia illustrated how alternative conceptions of success were already shaping leadership practice at the school level, even if not formally recognised by the system. While acknowledging that schools continue to be judged on “SACE⁴ completion, A to E grades, [and] standardised testing,” he described success in more expansive terms: whether young people had “transitioned from school into a productive member of the community,” however they defined that for themselves. As he explained, equity meant asking whether the system had enabled students “to attain their own personal goals, what they want to do,” regardless of whether those aspirations aligned with traditional academic hierarchies.

⁴ The South Australian Certificate of Education (the senior secondary school qualification in South Australia).

Overall, in both countries school leaders' sentiments suggested similar perspectives that when accountability systems privilege a limited set of outcomes, they risk undermining the relational, contextual, and long-term holistic efforts that leaders view as central to equity. This metric misalignment does more than frustrate leaders, it actively shapes what equity can mean in practice. When systems signal through their accountability structures that only narrow outcomes matter, leaders are positioned to enact equity primarily through those terms, regardless of their broader professional commitments. This tension reinforces the conclusions of the previous two perspectives. Taken together, the three perspectives reveal that equity cannot be meaningfully advanced without alignment between how equity is defined, how success is measured, how resources are allocated, and how schools are held to account. The next section synthesises these findings and considers their implications.

5.6 Discussion and Implications

This study set out to understand how school leaders conceptualise and enact equity across two distinct policy contexts. What we found was not divergence but convergence: despite significant differences in governance, funding, and accountability arrangements, leaders in Scotland and South Australia described strikingly similar experiences of equity work. Equity was understood as dynamic and relational, requiring constant professional judgement (Perspective 1). It was enacted under conditions of resource scarcity, through difficult prioritisation decisions (Perspective 2). And it was constrained by accountability frameworks that privilege narrow outcomes over the holistic work leaders see as essential (Perspective 3). This cross-system convergence is the study's central finding, and it carries significant implications. If leaders in quite different policy contexts face essentially similar challenges, then the persistent gap between equity rhetoric and equity outcomes cannot be attributed primarily to the particularities of policy design. The problem appears more structural: equity

reforms are typically conceived as policy priorities but not resourced as such. Leaders are positioned to enact equity through professional judgement and local meaning-making, but within material conditions that systematically constrain what that enactment can achieve. The result is a form of equity work that is simultaneously essential and insufficient, maintained by leaders' professional commitment despite, rather than because of, the conditions in which they work.

By examining school leaders' perspectives in two distinct yet similar policy environments, this study offers fresh insight into how system-level equity policies and priorities are understood, negotiated, and operationalised at the school level. The findings in this article suggest a structural disconnect in equity related education reform between policy intentions and practical realities, especially regarding the resources schools are given to enact these policies. That is, school leaders are expected to respond to increasingly complex and common student educational and health needs, yet are inadequately resourced to do what would be required when their schools' performances are evaluated through metrics that privilege narrow, standardised, and often short-term indicators of success. These findings contribute to research literature and practical work (e.g. Ainscow & Chapman, 2025; Fullan, 2025) striving to help explain why equity remains stagnant in education systems performance and complicated to practice at the school level despite strong rhetorical system level commitment to equity and sustained related education reform efforts.

This finding extends policy enactment research by highlighting the material conditions within which interpretive work occurs. Enactment theory has productively drawn attention to how policies are translated, interpreted, and narrated in schools (Ball et al., 2011; Singh et al., 2013). Our findings suggest that this interpretive work is not freely creative but occurs within tight material constraints. When leaders lack adequate resources, their professional judgement becomes less about how to pursue equity and more about how to

triage within inadequacy. The conceptual flexibility that characterises leaders' understanding of equity (its dynamic, contextual character) may itself be partly a response to scarcity: a way of maintaining professional orientation toward equity even when the conditions for achieving it are absent.

One aspect that our findings in this study indicate could be contributing to the challenge of enacting equity-oriented reforms is that the concept of equity in education remains ambiguous, interpreted differently by policymakers and the school leaders responsible for enactment. A further implication is that school leaders' ability to champion equity is constrained by dominant accountability frameworks that do not value enhancing social equity the same way they reward individual excellence. If equity continues to be measured mainly through standardised assessments, the deeper, relational, and context-sensitive work that leaders describe as central to equity will remain undervalued and unsupported. This misalignment does more than frustrate leaders; it actively shapes what equity can become in practice. When systems signal through their accountability structures that only certain outcomes matter, they constrain the equity work that leaders can pursue, regardless of professional commitment or policy rhetoric.

These findings suggest that when system-level policies set high but vague or narrow expectations for equity outcomes, school-level responses are shaped primarily by the resources and policy signals leaders receive. Where funding, staffing, and support services are insufficient or fragmented, equity becomes difficult to operationalise, regardless of commitment, or expertise; despite numerous other system level policies and initiatives aimed at enhancing equity in education, such as school improvement, teacher autonomy, or student agency.

As much of the world continues to experience increasing economic and income inequalities (Piketty, 2014; Wilkinson & Pickett, 2018), equity will likely remain a central

pillar of education policy in the coming years. As policy agendas broaden to encompass issues traditionally addressed in other social sectors, such as health, wellbeing, and community services, schools will continue to be expected to respond to a wider range of needs than ever before (Australian Government, 2023; Scottish Government, 2023; OECD, 2025). Yet, even with the best intentions, schools alone cannot fulfil these expectations. In Scotland, the University of Glasgow's Centre for Transformative Change in Schools (formerly the Robert Owen Centre for Educational Change) focuses on educators' professional learning and collaborative practice to support transformational changes and address equity. South Australia does not currently have a similar research centre. Without coherent and coordinated support from across government and stronger alignment between policy goals and frontline realities, the promise of educational equity will continue to exceed the capacity of schools to deliver it.

Our findings point to *three conditions* that would need to change for equity reforms to achieve their stated aims.

First, systems would need to move beyond rhetorical commitment toward shared, operational conceptions of equity that align policy intentions, the dynamic realities of school life, resource allocations, and accountability metrics. Currently, the definitional ambiguity of equity enables systems to claim commitment while leaving the difficult work of definition to individual leaders.

Second, the chronic underfunding of equity work, evident across both Scottish and Australian contexts, needs to be addressed. Our findings suggest that continuous investment in building evidence literacy and data use in schools can help school leaders and teachers engage more effectively in policy dialogues, but such capacity-building cannot compensate for inadequate resources.

Third, accountability frameworks would need to expand to include broader measures of educational success that acknowledge the relational and contextual dimensions of equity work, alongside robust and cross-sectoral support structures that recognise and adequately resource the social and health dimensions of students' needs.

Ultimately, the leaders in this study are not failing to enact equity. They are enacting it daily, through professional judgement, moral commitment and constant adaptation to student need. But they are doing so within conditions that make genuine equity achievement structurally unlikely. Only when policy definitions, resource allocations, and accountability mechanisms align with the complex realities of school life will education systems be able to make meaningful progress toward the equitable futures they so often promise.

Chapter 6. Conclusions

Mass public schooling was once imagined as a “great equaliser.” Yet as outlined in previous chapters, persistent disparities continue. The moral imperative identified at the outset of this thesis therefore remains unresolved, with corresponding negative economic, social, political and related compounding consequences. What this study suggests, however, is that the barrier may not only lie in inadequate effort, but in insufficient conceptual clarity.

A promising way forward may be to develop a coherent framework for equity that is consistently understood within individual systems, but that can also be applied flexibly at different scales, from system level policy to classroom practice. Such a framework for understanding equity in education could guide more effective, context-sensitive action and avoid the unintended consequences of past efforts.

Based on the cumulative synthesised literature and findings from the previous studies included in this thesis, this chapter answers the research question: how *is* equity in education understood in education systems? Findings from the three studies and a meta-framing emerging from them lead to four scenarios outlining how equity in education *could* be understood in education systems. Then, I provide my view on how equity in education *should* be understood in education systems, from a policy design point of view. This chapter ends with practical considerations and implications for policymakers, schools, and researchers in the future.

6.1 Understanding equity in education

Despite equity becoming a central policy priority globally, its meaning remains conceptually unclear, inconsistently articulated, and variably enacted. This thesis set out to examine

whether this lack of conceptual coherence may itself be limiting progress toward more equitable outcomes.

This study used a multi-scalar approach to examine how equity in education is understood across global, national/regional education system, and school levels. Drawing on synthesised empirical analysis of OECD policy texts, alongside qualitative data from policymakers and school leaders in Scotland and South Australia, the study identifies three main findings, outlined below, which offer new insights into how equity is understood in education systems.

The first main finding is that *understanding equity in education lacks clarity and coherence across and within the interconnected global, system, and school levels*. This finding highlights the relevance of a central tension related to this study: whether equity in education should have a universal meaning, or not.

Policymakers argued that equity is difficult to define clearly due to contextual and economic variations. School leaders contended that the absence of clear and meaningful system-level definitions of equity may result in insufficient resources and limited outcomes for equity-focused school practices. If policymakers and practitioners look to global organisations for clarity, such as the OECD or UNESCO, they are likely to find broadening and differing conceptions, rather than finding assistance for more coherent implementation.

This finding is significant particularly regarding the suggested need and intention as outlined in Chapter 1 of this thesis to take a step back and consider how equity in education is understood, and what it means. It demonstrates that exploring how equity is understood can uncover often-overlooked interconnected complexities and identifies a latent area of potential foundational innovation that could support the advancement of equity in education systems, that is, a better and clearer shared understanding of equity in education.

The second main finding is that there is disconnect between education system-level equity policies and their context-specific enactment at the school level. Similarity in experiences between South Australia and Scotland regarding conceptions of equity is striking. This similarity is noteworthy given the two systems' different policy architectures, funding mechanisms, and accountability structures, despite both being part of relatively wealthy, English-speaking OECD jurisdictions. This conclusion validates that equity in education is understood via a structural disconnect between policy intentions in equity-related reforms and the practical realities of enactment in schools.

The third main finding is that *equity in education is understood in dynamic ways that evolve in response to multiple and changing factors*. This suggests that equity in education is a characteristically non-static concept that perhaps cannot and should not be pinned down to always mean one particular definition. Or at least, it highlights that however the concept becomes more clearly defined, the definition should comprise flexibility and room for continued evolution.

A consistent theme across all studies was the view that broader and more holistic understandings of, and approaches to, equity would better support efforts to address equity in education in the future. Taken together, the findings suggest that equity in education is currently understood in education systems as:

- conceptually diffuse and inconsistently articulated across scales;
- conceptually and structurally disconnected between system level policies and school level enactment; and
- dynamically evolving in response to shifting political, social and epistemological conditions.

These findings help explain why equity has remained rhetorically powerful yet practically elusive. They were consistent across the studies regardless of education system, context or

scale. In other words, the study identifies core elements in how equity in education is understood that appear independent of system context or scale. These similarities have important implications for how equity in education is understood from a policy design perspective and inform meta-framings emerging from this study, presented below.

6.2 Meta-framings emerging from the study

The OECD analysis in Study 1 revealed conceptual broadening regarding equity in education without consolidation or increased definitional clarity. Analysis of empirical data from senior level education system policymakers in Study 2 demonstrated policy/system-level ambiguity and lacking translation of equity related initiatives into more equitable education outcomes. School leader perspectives in Study 3 revealed similar a practice-level disconnection from the system level and the mainstay of school-level contextual reinterpretation.

The conclusions generated by this study indicate that prevailing understandings of equity in education systems warrant re-examination. They suggest that lacking conceptualisation of equity in education systems can limit the effectiveness of how education policies and practices are designed and implemented in schools. Together, these findings converge on the need for a clearer but flexible multi-scalar framing of equity in education. From that perspective, a key meta-framing emerging from the study is that the articulation of a clearer understanding of equity in education constitutes a foundational condition for more coherent and effective action for enhancing equity within education systems.

A second meta-framing derived from the study concerns the relationship between system-level policy and school-level practice. This study suggests that weak shared understanding of equity in education may contribute to the disconnects between education policy intentions and their context-specific enactment in schools. Enhancing conceptual alignment across system levels may therefore be critical to addressing those gaps.

These meta-framings raise further questions about how such reframed understandings of equity might be taken up within education systems. The meta-framings also prompt other questions, such as: Should there be one single definition of equity in education shared across the education system? Could such a definition help evolve the understanding of equity to better address the disconnect observed between system level policy ideals and school level practice realities? How precisely should equity in education be defined at the system level versus allowing for the flexibility demanded for enactment at the school level? The answers to these questions are discussed below in the scenarios outlined in 6.3 and in 6.4.

The following outlined scenarios are intended to illuminate possible implications, tensions, and pathways for action arising from alternative ways of conceptualising equity in education. Rather than prescribing solutions, the scenarios that follow are designed to support education system policymakers in exploring how equity in education could be addressed under the meta-framings.

6.3 Four scenarios for understanding equity in education

There is no one way that equity in education has been understood in education systems. This leaves room for different approaches to understanding equity in education to be taken in the future. Since efforts to advance equity in education under current ways of understanding the concept have not yielded more equitable outcomes for many education systems, it is likely that re-thinking how the concept is understood, in ways research suggests might be more meaningful, has potential to create better and fairer changes in education systems that policymakers and practitioners hope to achieve.

Below are four scenarios for understanding equity in education along with the potential benefits and risks associated with each, derived from an analytical synthesis of key findings and literature from this thesis. The scenarios signal a shift in this chapter from the

empirical findings of how equity in education *is* understood in education systems toward normative considerations of how equity in education *could* be understood. The purpose of outlining these scenarios, along with their potential benefits and risks, is to provide context and a basis for the discussion that follows, in which I present my view on how equity in education *should* be understood in education systems, from a policy design perspective. It is also hoped that these scenarios may assist policymakers, practitioners, and researchers in reflecting on how equity in education is currently considered in their systems and how it might be understood and addressed moving forward.

Scenario 1: There is one clear, shared definition for equity in education that everyone is expected to follow across different levels of education system.

Potential benefits:

Without a clear definition of equity in education, accountability mechanisms risk being ineffective or misapplied (Ainscow, 2020; Sahlberg & Cobbold, 2021). A more precise articulation of equity could strengthen policy implementation, enable more accurate measurement of educational equity, and provide clearer structures for accountability. For example, in Australia, equity is a central element of the *Alice Springs (Mparntwe) Education Declaration 2019*; however, because it is not well-defined, its intent is often translated unevenly across state and territory education policies, limiting its practical impact.

Potential risks:

A clearer definition of equity that often leads to better understanding at the system level may not adequately consider the appropriate dynamic contexts of local school communities. What's more, any one broad definition that assumes all schools will try to reach equity targets in the same ways faces a potential risk of perpetuating or even exacerbating existing inequities in

schools with different capacities to improve excellence and equity of education outcomes. If schools are expected to compete to improve on a broader array of high-stakes equity targets without sufficient conditions and adequate resourcing, existing inequities could become exacerbated (Darling-Hammond, 2013; Jennings & Sohn, 2014; National Academies of Sciences, Engineering, Medicine, 2019). One way to mitigate this risk is for the system level to consider suggestions from other relevant parties during the development of this one clearer and broader definition (such as schools, parents, students). However, the genuine consideration of feedback during such endeavours can vary.

Scenario 2: There is a broad, general system-level policy framework for equity in education, and a more nuanced operational definition is designed at the community level, e.g. the school, group of schools, or community level.

Potential benefits:

The system level directives or policies defers defining equity in education to schools due to contextual reasons. This means that understandings of equity may differ from school to school, but these understandings should all be within a general policy-level framework. Research (Harris et al., 2018; Roegman, 2017; Savage, 2013; Teemant et al., 2021) and findings from this study suggest that equity in education is contextual at the community or school level. This means that equity at the system level needs to be defined so that it leaves flexibility to communities and schools to adapt it to local conditions and socio-economic circumstances. School improvement and school autonomy is often based on assumption that schools should have more control and agency to improve school and system outcomes (Keddie et al., 2023; Steiner-Khamisi, 2025). In this scenario, agency includes will and skill to define equity, what it means in any given school or community and how to best address existing inequities in practice. Consequently, schools can define, interpret, enact, monitor and be held to account for

equity in education in ways that are meaningful to their contexts. This would address the regularly observed issue of system aims not considering the context-specific equity enactment at the school level.

Potential risks:

If equity is defined primarily at the local or community level, questions arise about responsibility and capacity across the education system. From a multi-scalar perspective, heavy reliance on local discretion can shift the burden of addressing structural inequalities onto schools and communities with unequal resources and influence (Keddie, 2017). In this sense, decentralisation may operate as a form of responsibility and accountability shifting, allowing system authorities to distance themselves from the difficult work of addressing entrenched inequities in education (Quilabert, 2024).

Weak vertical coherence between system-level education policies and school-level practice can further lead to uneven interpretation and implementation of equity goals. Where expectations are ambiguous and support inconsistent, local enactment is shaped by existing conditions, often producing variation that reflects differences in capacity rather than deliberate design. Without mechanisms for coherence, shared learning, and collective responsibility, locally generated initiatives may coexist with persistent inequities rather than reducing them. Advancing equity therefore requires active system stewardship that combines clear expectations, attention to resource distribution, and relational conditions that support meaningful vertical coherence between system-level policies and school-level practice. Trust, in this view, complements rather than replaces system responsibility.

Scenario 3: Equity in education is collaboratively co-defined by system-level policymakers and community and school level practitioners in a way that collectively addresses meanings and contexts at both the system and community/school levels within the meaning.

Potential Benefits:

This scenario merges the benefits while also addressing the risks from the previous two scenarios. Rather than a single, fixed definition of equity, this scenario suggests a clearer, collaboratively expressed, multidimensional understanding of equity at the system level, one that provides shared direction while explicitly enabling schools and communities to interpret and enact equity in ways that are meaningful to their local contexts.

Potential risk:

While co-defining equity across system and school levels offers the promise of shared ownership, it may also result in definitions that are necessarily broad in order to accommodate diverse perspectives. Such breadth can lead to overly general interpretations in practice, where the concept of equity becomes open to multiple, and potentially competing, meanings across contexts. In turn, this may produce a loosely specified framework that makes it difficult for system authorities to monitor progress, allocate resources strategically, or assess whether equity goals are being achieved consistently across the system.

Moreover, collaborative definition requires new forms of coordination, dialogue, and mutual learning that may represent a significant departure from established ways of working. Without deliberate attention to building professional trust, clarifying roles, and establishing robust processes for shared accountability, efforts to co-define equity risk remaining symbolic rather than translating into coherent action or measurable improvement.

Scenario 4: No significant changes to current way equity in education is defined in education policies and enactment.

Potential benefits:

Education systems avoid the political risk and disruption associated with pursuing alternative approaches. Time, energy, and resources are not diverted into reform efforts that may generate uncertainty or resistance.

Potential risks:

Continued stagnation in equity outcomes, reflecting the limited progress observed across many education systems over the past three decades. Ongoing investment in approaches that have not demonstrably shifted structural inequities. Failure to pursue potentially more effective or transformative strategies, leading to the perpetuation of inequitable outcomes for children and young people, with long-term social and economic consequences.

None of the scenarios above regarding how equity in education could be defined in education systems could ensure that there is significant improvement regarding equity in education being better addressed in education systems. Using conclusions in this study together with available research literature and policy reviews, below I craft a proposal for how equity in education *should* be understood and defined in different levels of education systems.

6.3 How *should* equity in education be defined?

Rather than advocating the need for a single, fixed definition of equity, the findings and scenarios above suggest the importance of a clearer, collaboratively developed, multidimensional understanding of equity at the system level, one that provides shared direction while explicitly enabling schools and communities to interpret and enact equity in ways that are meaningful to their local contexts.

Sahlberg and Cobbold (2021, p. 4) have argued that such improved understanding could lead to greater impact:

Refocusing education policies and leadership on equity as has happened across the OECD countries will have little real impact on education systems performance unless

polymakers and school leaders have much better common understanding of what equity in education means and why it is an important part of leading the system.

Sahlberg and Cobbold also propose a way forward for the “better common understanding of what equity in education means” as a “dual” definition combining “both an individual and a social group aspect.” In essence, they suggest that achieving equity in education should be understood as a dual objective: as achieving a relatively equal distribution of education outcomes amongst different social (student or equity) groups with all students reaching an agreed adequate educational threshold (Sahlberg & Cobbold, 2021). Their dual definition is that:

Equity should have regard to both the minimum levels of achievement expected for all students and the relative distribution of outcomes between different social groups (p. 15).

And additionally, that:

Equity in education should refer to equity in outcomes and incorporate both an individual and a social group aspect. First, from an individual perspective, equity in education outcomes should mean that all children receive an education that enables them to fully participate in adult society in a way of their choosing, i.e. an adequate education. Second, equity in education should mean that children from different groups in society because of their gender, class, race, ethnicity and domicile achieve similar education outcomes to ensure non-discrimination. Equality of outcomes is more relevant to comparisons between social groups than individuals, that is, social equity (p. 6).

It is worth noting that that kind of dual understanding including an adequate level of achievement and relative distribution of outcomes between different social groups is similar to the dimensions of inclusion and fairness suggested by the OECD (2012). However, the

OECD dimensions largely infer/refer to PISA and other large-scale student assessment data, whereas the Sahlberg and Cobbold proposition leaves defining the minimum levels of achievement and “outcomes” definitions to be defined in potentially broader ways. Sahlberg and Cobbold contend that this kind of dual definition focusing on outcomes could help better guide policymaking and other relevant leaders, as well as improve operationalisation regarding equity in education.

This study suggests, as outlined in the meta-framings emerging from this study, that such a dual definition should be expanded to more distinctively acknowledge and support the contextual nature of equity in education at the community/school level. Specifically, it should provide shared direction at the system level while explicitly enabling schools and communities to also interpret and enact equity in ways that are meaningful to their local contexts. The multidimensional framework proposed below in this thesis seeks to advance the dual definition proposed by Sahlberg and Cobbold (2021) by making more explicit the relationship between system-level guidance and clarity, and valuing local-level articulations. In doing so, the framework proposed below conceptualises equity not only as a concept to be defined meaningfully at the policy level, but also as a dynamic process that must be interpreted and enacted pluralistically across diverse school/community, and system-level settings. In this way, the framework seeks to reconcile a tension identified throughout this thesis: the need for definitional clarity in policy, and the need for flexibility in interpretation and enactment across diverse educational contexts in different schools and communities.

At the same time, the framework has its own limitations. While it offers a conceptual structure for balancing shared direction and contextual interpretation and enactment, its practical effectiveness would ultimately depend on how it is operationalised within specific policy environments. Education systems vary in their governance arrangements, professional capacity, political, and other contexts, which can influence how such a framework is

interpreted and applied. As such, the framework should be understood as a conceptual contribution intended to guide thinking about equity-oriented policy design, rather than as a prescriptive model that can be uniformly applied across systems. I propose that such a multidimensional definition framework should be conceptualised as follows:

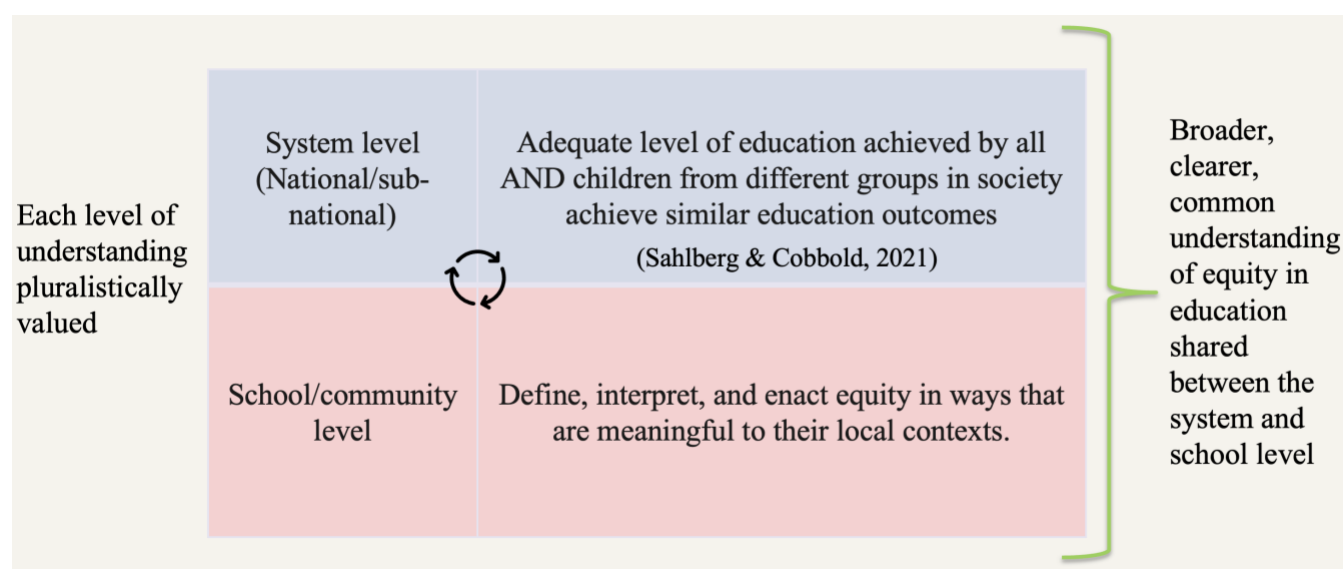


Chart 2: *How should equity in education be defined in education systems according to the meta-framings emerging from this study?*

Defining equity in education according to *Chart 2* addresses and embraces what has been considered a disconnect between the school and system level. Such a view of equity in education systems could have significant implications for how equity would be understood and addressed in education systems as this is not the normative approach taken, from a policy design point of view. For example, the current *BFSa* in Australia has been critiqued as not addressing equity in a way that is meaningful in school practice (Kenway & Boden, 2025; Sahlberg & Savage, 2025).

6.4 Further considerations

The understanding of equity in education systems as described above should be grounded in collaborative, iterative, trust-based system improvement approaches. This means the system level would adopt:

- A strong improvement orientation rather than a narrow high-stakes accountability stance
- Active support for schools through professional learning, capacity building, and resource allocation/redistribution
- A commitment to coherence, system-ness, and professional trust

As such, system-level accountability frameworks would be built around trust, transparency and reciprocal responsibility rather than compliance and performativity. Such a way of operating is referred to as collective autonomy, where schools exercise agency within a coherent shared and steered framework (Hargreaves, 2015).

A useful illustration of such a way of operating that *Chart 2* encourages is from Pak-Tee Ng's description of Singapore's education system as highly centralised and highly decentralised at the same time. In Singapore:

The central government sets strategic priorities (e.g., student wellbeing). But schools have autonomy to implement these priorities in ways that suit their local context. He (Pak-Tee) calls this strategic alignment (centralised vision) and tactical empowerment (decentralised execution); an approach allowing for system-wide coherence while respecting local agency...(Orbis, 2025, p. 1)

This differs from some school autonomy reforms, including aspects observed in Australia, where schools were granted operational freedom but still tightly bound to centrally determined targets that did not necessarily reflect local priorities, within a highly marketised education environment (Perry et al., 2024). In such contexts, autonomy or 'decentralisation' has sometimes been associated with increased inequity.

Under the proposed model for how equity should be defined in education systems, schools would not merely be given freedom to pursue centrally imposed metrics. Instead:

- The system might set minimum shared commitments (e.g., reading literacy for all students).
- Schools would also be supported to define what equity means in their own context.
- Schools would identify locally meaningful indicators of progress.
- Accountability would operate at two levels: to shared system aims and to locally defined equity goals.

In Scotland, schools have had more flexibility and autonomy (or, ‘empowerment’) to define, enact, and monitor health and wellbeing initiatives (Forde & Torrance, 2021). But those elements have been less valued at the system level that has prioritised literacy and numeracy achievement. I note this to again stress the point of difference with the proposed understanding in *Chart 2*: understandings and priorities between the system and school level would be pluralistically valued and pluralistically set. The implication being that pluralistic valuing will more likely result in re-distribution of resources and accountability mechanisms, accordingly.

That is, schools would be supported adequately to reach system level aims, such as a minimum standard for numeracy for all students. However, school improvement plans and accountability frameworks would allow for each school and community to make their own meanings of what equity in education means, what the indicators of improvement or success in that understanding would be, and how to monitor and measure the actualisation of that understanding in their context. Schools would then be held equally responsible to their own level’s understanding and aims as well as to the system level’s definition. And vice-versa for the system level, they would be held to account according to their definition/understanding as

well as how they are supporting the school/community level's aims based on their differing understandings.

In Finland, according to Sahlberg (2018, p. 151), two influential strategies for enhancing equity have been:

- (a) school-based curricula that give teachers and principals the power and responsibility to define values, purpose, and overall educational goals for their school, and
- (b) access to purposeful professional learning to help teachers and schools to improve their work towards these goals.

It might be, that a school-based curricula element could be a part of how schools choose to define, measure and monitor equity efforts at the school level. In their study of curriculum enactment, Hickey and Riddle (2023, p. 82), argue relational pedagogy is required to generate more engaging and effective outcomes for schools, teachers, and students; that is:

it is important for teachers to thoughtfully engage in pedagogical moves that nurture relational bonds with students as part of a commitment to an authentic relational pedagogy that exceeds the limitations of prescriptive, standardised and formulaic educational practices and accountabilities.

School-based curricula may be better positioned to realise that kind of more engaging and relational curriculum enactment.

For this thesis, I leave the expanded proposition of how equity in education should be understood/defined in education systems extended just to the school/community level.

However, that proposition could be further expanded to include other levels, such as the state level, the global level, or the individual level, as examples. In line with conclusions from this study regarding multi-sector collaboration for enhanced equity in education in the future, other public policy sectors, e.g., like health, could also be connected and included in a new

pluralistic and multidimensional understanding of equity in education systems, from a policy design point of view.

6.5 Continuing the evolution and the research

The multi-scalar design, introduced in this thesis as necessary for understanding policy design complexity, proved essential in revealing how equity shifts meaning as it moves across global, system and school levels. What has been learned from the examination of the OECD's equity conceptualisations and work in this study is that the OECD's conception of equity has evolved with the progress of research and increased data.

The more information we have about the importance of different outcomes of education, like wellbeing and sense of belonging, will mean that there will be evolving aspects of equity considerations as well. It is likely that the evolution of equity will progress according to continued insights about ways to optimise children's and human's healthy holistic development and how to address equity in education, as well as due to changes in society and advancing ideas about the purpose of school education, amongst other factors.

This research suggests that there is a need for more research into how equity is defined, understood and practiced at the global, system and school levels. Further research on how equity in education should be defined in education systems to generate more impactful practice in schools and communities would be worthwhile research to pursue, as developing a better understanding of what equity in education means can be an important foundational step towards better and fairer futures for all.

While the past three decades have not delivered the transformative equity gains many hoped for, equity in education remains a deeply compelling and hopeful ideal. The convergence of persistent inequality with broader global instability, the poly-crisis, may, paradoxically, create conditions for renewed imagination and system transformation. History

suggests that significant societal shifts often follow prolonged periods of strain (van Eck Duymaer van Twist & Newcombe, 2021). If so, this moment may represent not decline, but a turning point.

Evolving our understanding of equity may be part of that shift. By broadening equity beyond narrow performance gaps toward holistic human flourishing, collective wellbeing, and sustainable futures, education systems may be better positioned to contribute to both social justice and social cohesion.

Among democratic systems with strong public education traditions, countries such as Scotland and Australia may be particularly well placed to model new approaches that balance pluralism, collective responsibility, and system coherence. Leadership in equity need not be defined by rhetoric alone, but by the courage to interrogate assumptions, refine definitions, and align practice with purpose.

My project began by suggesting that before continuing reform efforts, we may need to step back and interrogate the conceptual foundations of equity. The findings confirm that such conceptual work is not peripheral to reform, it is pre-conditional to it. Ultimately, this thesis argues that equity in education is neither unattainable nor inevitable. It is constructed through the ideas we privilege, the measures we select, and the purposes we pursue.

Clarifying what we mean by equity is therefore not an academic exercise, it is a moral and practical imperative. If we are willing to undertake that work, more just and hopeful educational futures remain absolutely possible.

References

- ACARA. (2020). *The Shape of the Australian Curriculum. Version 5.0*. Australian Curriculum, Assessment and Reporting Authority.
https://www.acara.edu.au/docs/default-source/curriculum/the_shape_of_the_australian_curriculum_version5_for-website.pdf
- ACARA. (2025). *National Results Commentaries*. Australian Curriculum, Assessment and Reporting Authority.
<https://dataandreporting.blob.core.windows.net/anrdataportal/ANR-Documents/NAP2025/2025%20NAPLAN%20National%20Results%20Commentary.pdf>
- Adams, L., & McCloskey, K. (2026). “Scotland’s attainment gap wider than before the pandemic.” BBC news. <https://www.bbc.com/news/articles/c20j12pw851o>
- Adamson, F., Åstrand, B., and Darling-Hammond, L. (2016). *Global Education Reform*. Routledge.
- Addey, C., & Sellar, S. (2020). The rise of international large-scale assessments and rationales for participation. In *The Legacy of Jullien's Work for Comparative Education* (pp. 132-150). Routledge.
- Ahmed, S., & Asraf, R. M. (2018). The workshop as a qualitative research approach: lessons learnt from a “critical thinking through writing” workshop. *The Turkish Online Journal of Design, Art and Communication*, September 2018 Special Edition, 1504-1510.
- Ainscow, M. (2015). *Struggles for equity in education: The selected works of Mel Ainscow*. Routledge.

- Ainscow, M. (2020). Promoting inclusion and equity in education: lessons from international experiences. *Nordic Journal of Studies in Educational Policy*, 6(1), 7–16.
<https://doi.org/10.1080/20020317.2020.1729587>
- Ainscow, M. (2022). Time for an inclusive turn: Mel Ainscow on inclusion as a guiding principal for education reform in Portugal. *International Education News*.
<https://internationalednews.com/2022/03/30/time-for-an-inclusive-turn-mel-ainscow-on-inclusion-as-a-guiding-principle-for-educational-reform-in-portugal/>
- Ainscow, M., & Chapman, C. (2025). Developing equitable education systems: propositions and barriers. *Journal of Educational Change*, 26, 373-396. <https://doi.org/10.1007/s10833-025-09527-2>.
- Ainscow, M., Dyson, A., Goldrick, S., and West, M. (2013). Promoviendo la equidad en educación [Versión en inglés]: Promoting equity in education. *Revista de investigación en educación*, 11(3), pp. 32-43.
- Aiston, S. J., & Walraven, G. (2024). A re-view of educational inequalities. *Educational Review*, 76(1), 1–12. <https://doi.org/10.1080/00131911.2023.2286849>
- Akmal, M. & Pritchett, L. (2021). Learning equity requires more than equality: Learning goals and achievement gaps between the rich and the poor in five developing countries. *International Journal of Educational Development*, 82, 102350.
- Alexander, K., & Morgan, S. L. (2016). The Coleman report at fifty: Its legacy and implications for future research on equality of opportunity. *RSF: The Russell Sage Foundation Journal of the Social Sciences*, 2(5), 1-16.
- American Statistical Association. (2014). *ASA Statement on Using Value-Added Models for Educational Assessment*. <https://www.amstat.org/asa/files/pdfs/POL-ASAVAM-Statement.pdf>

- Andreasson, I., Ohlsson, L., & Assarson, I. (2015). Operationalizing equity: the complexities of equity in practice. *Education, Citizenship and Social Justice*, 10(3), 266-277.
<https://doi.org/10.1177/17461979156072>.
- Antony-Newman, M. (2023). Questioning equity and excellence in Ontario and Scotland: Critical policy analysis of parent inclusion for reducing educational inequality. *Comparative and International Education / Éducation Comparée et Internationale* 52(1).73-86. <http://doi.org/10.5206/cie-eci.v52i1.15365>
- Appels, L., De Maeyer, S., Faddar, J., & Van Petegem, P. (2022). Unpacking equity. Educational equity in secondary analyses of international large-scale assessments: A systematic review. *Educational Research Review*, 100494.
<https://doi.org/10.1016/j.edurev.2022.100494>
- Arnové, R. F. (2009). World-systems analysis and comparative education in the age of globalization. In *International handbook of comparative education* (pp. 101- 119). Springer.
- Aspers, P., Corte, U. (2019). What is qualitative in qualitative research. *Qualitative Sociology*, 42, 139–160. <https://doi.org/10.1007/s11133-019-9413-7>
- Auld, E., & Morris, P. (2016) PISA, policy and persuasion: translating complex conditions into education ‘best practice.’ *Comparative Education*, 52:2, 202-229,
<https://doi.org/10.1080/03050068.2016.1143278>
- Auld, E., & Morris, P. (2021). A NeverEnding story: tracing the OECD's evolving narratives within a global development complex. *Globalisation, Societies and Education*, 19(2), 183-197. <https://doi.org/10.1080/14767724.2021.1882959>
- Australian Bureau of Statistics. (2025). Schools.
<https://www.abs.gov.au/statistics/people/education/schools/latest-release>

- Australian Council for Educational Research (ACER). (2024). PISA 2022. Reporting Australia's results. Volume II: Student and school characteristics. ACER.*
- Australian Government, Department of Education, Skills and Employment. (2018). *Through growth to achievement: Report of the Review to Achieve Educational Excellence in Australian Schools (Report)*. Retrieved from <https://files.eric.ed.gov/fulltext/ED586130.pdf>.
- Australian Government. (2025). Closing the Gap. <https://www.education.gov.au/closing-the-gap>
- Australian Government. (n.d.). Schooling resource standard. <https://www.education.gov.au/recurrent-funding-schools/schooling-resource-standard>
- Avvisati, F. (2020). The measure of socio-economic status in PISA: A review and some suggested improvements. *Large-Scale Assessments in Education*, 8(1), 8. <https://doi.org/10.1186/s40536-020-00086-x>
- Baird, J.-A., Johnson, S., Hopfenbeck, T. N., Isaacs, T., Sprague, T., Stobart, G., & Yu, G. (2016). On the Supranational Spell of PISA in policy. *Educational Research*, 58(2), 121-138. <https://doi.org/10.1080/00131881.2016.1165410>
- Baker, D. P., Brian Goesling, & Gerald K. LeTendre. (2002). Socioeconomic status, school quality, and national economic development: a cross-national analysis of the “heyneman-loxley effect” on mathematics and science achievement. *Comparative Education Review*, 46(3), 291-312. <https://doi.org/10.1086/341159>
- Ball, S. J., Maguire, M., & Braun, A. (2011). *How schools do policy: Policy enactments in secondary schools*. Routledge.
- Bartlett, L., & Vavrus, F. (2016). *Rethinking Case Study Research: A Comparative Approach* (1st ed.). Routledge. <https://doi.org/10.4324/9781315674889>

- BBC News. (2015, December 15). "OECD passes judgement on Scotland's Curriculum for Excellence". *BBC*. <https://www.bbc.com/news/uk-scotland-35101835>
- BBC News. (2025, June 26). "MSPs pass bill to scrap SQA for new Scottish exams body". *BBC*. <https://www.bbc.com/news/articles/crrqd757j4no>
- Becker, G. S. (1994). Human capital revisited. In *Human capital: A theoretical and empirical analysis with special reference to education, third edition* (pp. 15-28). The University of Chicago Press.
- Beckert, J. (2020). The exhausted futures of neoliberalism: from promissory legitimacy to social anomy. *Journal of Cultural Economy*, 13(3), 318-330.
<https://doi.org/10.1080/17530350.2019.1574867>
- Berkovich, I., & Eyal, O. (2021). Transformational leadership, transactional leadership, and moral reasoning. *Leadership and Policy in Schools*, 20(2), 131–148.
<https://doi.org/10.1080/15700763.2019.1585551>.
- Biesta, G. (2022). Reclaiming a future that has not yet been: The Faure report, UNESCO's humanism and the need for the emancipation of education. *International Review of Education*, 68(5), 655-672. <https://doi.org/10.1007/s11159-021-09921-x>
- Bills, A., Howard, N., and Hattam, S. (2024). Problematising "World Class" public education policy in South Australia: Insights for education policy makers. *Journal of Educational Leadership, Policy and Practice*, 38, pp. 22-45.
- Blackmore, J. (2007). Equity and social justice in Australian education systems: Retrospect and prospect. *International handbook of urban education*, SIHE, Volume 19, pp. 249-264.
- Bogdan, R., & Biklen, S. K. (1997). *Qualitative research for education* (vol. 368). Boston, MA: Allyn & Bacon.

- Braun, V., & Clarke, V. (2006). Using thematic analysis in psychology. *Qualitative Research in Psychology*, 3(2), 77-101. <https://doi.org/10.1191/1478088706qp063oa>.
- Bray, M., & Kobakhidze, M. N. (2014). Measurement issues in research on shadow education: Challenges and pitfalls encountered in TIMSS and PISA. *Comparative Education Review*, 58(4), 590-620. <https://doi.org/10.1086/677907>
- Brighouse, H., Ladd, H., Loeb, S. and Swift, A. (2018). *Educational Goods*. Chicago: University of Chicago Press.
- Bronfenbrenner, U. (1994). Ecological models of human development. In *International Encyclopedia of Education*, 3(2). Ed. Oxford: Elsevier. Reprinted in: Gauvain, M. & Cole, M. (Eds.), *Readings on the development of children*, 2nd Ed. (1993, pp. 37-43). NY: Freeman.
- Brown v. Board of Education Topeka, 347 U.S. 483, 493 (1954).
<https://www.archives.gov/milestone-documents/brown-v-board-of-education#:~:text=On%20May%2017%2C%201954%2C%20U.S.,amendment%20and%20was%20therefore%20unconstitutional>.
- Brown, K. M., Benkovitz, J., Muttillio, A., and Urban, T. (2011). Leading schools of excellence and equity: Documenting effective strategies in closing achievement gaps. *Teachers College Record*, 113(1), pp. 57-96.
- Bryce, T. G. K., Humes, W. M., Gillies, D., & Kennedy, A. (2018). *Scottish Education* (5th ed.). *Edinburgh University Press*.
- Burgess, C., & Lowe, K. (2022). Rhetoric vs Reality: The Disconnect between Policy and Practice for Teachers Implementing Aboriginal Education in Their Schools. *Education Policy Analysis Archives*, 30(97).

- Cairney, P. (2025). Policymaking integration, policy coherence, and whole-of-government approaches: a qualitative systematic review of advice for policymakers. *Open Research Europe*, 5(75), 75. <https://doi.org/10.12688/openreseurope.19864.1>
- Cairney, P., and Kippin, S. (2022). The future of education equity policy in a COVID-19 world: a qualitative systematic review of lessons from education policymaking. *Open Research Europe*, 1(78), pp. 1-43. <https://doi.org/10.12688/openreseurope.13834.2>
- Campbell, C., and Harris, A. (2023). *All Learners in Scotland Matter: The National Discussion on Education Final Report*. <https://www.gov.scot/publications/learners-scotland-matter-national-discussion-education-final-report/documents/>
- Chapman, C. (2019). From hierarchies to networks: possibilities and pitfalls for educational reform of the middle tier. *Journal of Educational Administration*, 57(5), 554-570. <https://doi.org/10.1108/JEA-12-2018-0222>.
- Chapman, C., & Donaldson, G. (2023). *Where next for Scottish Education: Learning is Scotland's Future?* https://www.gla.ac.uk/media/Media_930286_smxx.pdf
- Chapman, C., & Donaldson, G. (2024). *Where next for Scottish Education: Leading from the Classroom (Part 2)*.
- Chapman, C., Chestnutt, H., Friel, N., Hall, S., & Lowden, K. (2018). *Taking the lead: Teachers leading educational reform through collaborative enquiry in Scotland*. In A. Harris, M. Jones, & Jane B. Huffman (Eds.) *Teachers Leading Educational Reform*. Routledge. (pp. 11-31). Routledge.
- Chapman, C., Lowden, K., Chestnutt, H., Hall, S., McKinney, S., & Friel, N. (2016). *The School Improvement Partnership Programme: Sustaining collaboration and enquiry to tackle educational inequity* (Final project report to Education Scotland). University of Glasgow.

- Checkland, P., & Poulter, J. (2020). Soft systems methodology. In M. Reynolds & S. Holwell (Eds.), *Systems approaches to making change: A practical guide*. Springer.
- Chen, W. (2025). The first legislation in the world to ban social media for children under 16 by the Australian Government: Its basis, implications and influences in the world. In *10th International Conference on Behavioral Addictions July 7–9, 2025 Nantes, France* (Vol. 1, p. 12).
- Chin, M., Fontdevila, C., Lewis, S., Gulson, K. N., Wilkins, A., Besche-Truthe, F., Martens, K., Niemann, D., Windzio, M., & Tunc, Y. (2024). *Researching Global Education Policy: Diverse Approaches to Policy Movement*. Policy Press.
- Chzhen, Y., Gromada, A., Rees, G., Cuesta, J., and Bruckauf, Z. (2018). An Unfair Start: Inequality in Children's Education in Rich Countries. UNICEF, *Innocenti Report Card 15*.
- Civil Rights Act of 1964. (1964). National Archives. <https://www.archives.gov/milestone-documents/civil-rights-act#:~:text=No%20person%20in%20the%20United,activity%20receiving%20Federal%20financial%20assistance>
- Cobbold, T. (2019). *More studies show that money really does matter in education*. <https://saveourschools.com.au/funding/more-studies-show-that-money-really-does-matter-in-education/>
- Cobbold, T. (2019). *OECD says 3 in 4 Australian students do not try on PISA tests*. <https://saveourschools.com.au/league-tables-andtesting/oecd-says-3-in-4-australian-students-do-not-try-on-pisa-tests/>
- Cobbold, T. (2025, May). *Research studies show money matters for student achievement*. *Western Teacher*, 54(3). The state school teachers' union of

- w.a. <https://www.sstuwa.org.au/WesternTeacher/2025/volume-543-may-2025/research-studies-show-money-matters-student-achievement>
- Cobbold., T. (2024). The state of school funding in Australia.
<https://apo.org.au/sites/default/files/resource-files/2024-05/apo-nid326927.pdf>
- Coburn, C. E. (2005). Shaping teacher sensemaking: school leaders and the enactment of reading policy. *Educational Policy*, 19(3), 476–509. <https://doi.org/10.1177/0895904805276143>.
- Coleman, J., Campbell, E., Hobson, C., McPartland, J., Mood, A., Weinfeld, F., and York, R. (1966). *Equality of Educational Opportunity*. Washington, DC: Government Printing Office.
- Collins, C., & Yates, L. (2009). Curriculum Policy in South Australia Since the 1970s: the Quest for Commonality. *Australian Journal of Education*, 53(2), 125-140.
<https://doi.org/10.1177/000494410905300203>.
- Comstock, M. (2025). Negotiating Equity: A Critical Policy Analysis of Equity Sensemaking in District Partnership Initiatives. *Educational Evaluation and Policy Analysis*.
<https://doi.org/10.3102/01623737251336728>
- Commonwealth of Australia. (2026). *Commonwealth Closing the Gap 2025 Annual Report and Commonwealth Closing the Gap 2026 Implementation Plan*.
<https://www.niaa.gov.au/sites/default/files/documents/2026-02/CTG-2025-26-AR-IP.pdf>.
- Connell, R. (2012). Just Education. *Journal of Education Policy*, 27(5), 681–683.
<https://doi.org/10.1080/02680939.2012.710022>.
- Cook, E. D. (2015). The challenges of leading the attainment agenda: framing the role and practices of the new secondary headteacher. Thesis. *University of Stirling*.
<http://hdl.handle.net/1893/22251>.

- Council of Australian Governments Education Council. (2019). Alice Springs (Mparntwe) Education Declaration. <https://www.education.gov.au/alice-springs-mparntwe-education-declaration>
- Courtney, S. J., McGinity, R., & Gunter, H. M. (Eds.). (2018). *Educational leadership: Theorising professional practice in neoliberal times*. Routledge.
- Crenshaw, K. W. (2013). Mapping the margins: Intersectionality, identity politics, and violence against women of color. In *The public nature of private violence* (pp. 93-118). Routledge.
- Creswell, J. W., & Miller, G. A. (1997). Research Methodologies and the Doctoral Process. *New directions for higher education*, 99, 33-46. <https://doi.org/10.1002/he.9903>
- Crossley, M., & Vulliamy, G. (1984). Case-study research methods and comparative education. *Comparative Education*, 20(2), 193–207. <https://doi.org/10.1080/0305006840200202>.
- Cruickshank, V. (2017). The influence of school leadership on student outcomes. <https://doi.org/https://hdl.handle.net/102.100.100/541193>.
- Dadvand, B. (2024). Navigating the paradox of excellence and equity in school leadership. *The Australian Educational Researcher*, 51(4), 1239-1253. <https://doi.org/10.1007/s13384-023-00637-5>.
- Darling-Hammond, L. (2013). Inequality and school resources. *Closing the opportunity gap: What America must do to give every child an even chance*, 77.
- Darling-Hammond, L., Flook, L., Cook-Harvey, C., Barron, B., & Osher, D. (2020). Implications for educational practice of the science of learning and development. *Applied Developmental Science*, 24(2), 97-140. <https://doi.org/10.1080/10888691.2018.1537791>

- Day, C., Gu, Q., & Sammons, P. (2016). The impact of leadership on student outcomes: How successful school leaders use transformational and instructional strategies to make a difference. *Educational administration quarterly*, 52(2), 221-258.
<https://doi.org/10.1177/0013161X15616863>.
- de Loë, R. C., Melnychuk, N., Murray, D., & Plummer, R. (2016). Advancing the State of Policy Delphi Practice: A Systematic Review Evaluating Methodological Evolution, Innovation, and Opportunities. *Technological Forecasting & Social Change*.
<http://dx.doi.org/10.1016/j.techfore.2015.12.009>
- De Saxe, J. G., Bucknovitz, S., & Mahoney-Mosedale, F. (2020). The Deprofessionalization of Educators: An Intersectional Analysis of Neoliberalism and Education “Reform”. *Education and Urban Society*, 52(1), 51-69.
<https://doi.org/10.1177/0013124518786398>.
- Denzin, Norman K., and Yvonna S. Lincoln. 2003. *Introduction. The discipline and practice of qualitative research*. In *Collecting and interpreting qualitative materials*, ed. Norman K. Denzin and Yvonna S. Lincoln, 1–45. Thousand Oaks: SAGE Publications.
- Di Gregorio, E., Mulcahy, D., and Gerrard, J. (2025). Quantifying, measuring, and enacting equity: Assembling ‘who gets what’ in a federal system of education. *The Australian Educational Researcher*, 52, pp. 2957-2975. <https://doi.org/10.1007/s13384-024-00797-y>.
- Dickinson, E. (2016). Coleman report set the standard for the study of public education. *Johns Hopkins Magazine*. <https://hub.jhu.edu/magazine/2016/winter/coleman-report-public-education/>
- Dillon, S. (2010). Top test scores from Shanghai stun educators. *The New York Times*.
<https://www.nytimes.com/2010/12/07/education/07education.html>

- Dolan, C., Smith, L., Platt, A. L. M., Vass, N., & Kennedy, J. (2024). *Illuminating principal practice: Report to the South Australian Primary Principals Association, South Australian Secondary Principals Association and South Australian Area School Leaders Association* (ISBN 978-1-922046-44-4). University of South Australia. <https://saspa.com.au/wp-content/uploads/2024/05/FINAL-Illuminating-Principal-Practice-Report.pdf>.
- Donaldson, G. (2010). *Teaching Scotland's future: Report of a review of teacher education in Scotland* (Report). Scottish Government.
https://dera.ioe.ac.uk/id/eprint/2178/7/0110852_Redacted.pdf.
- Downey, D. B., & Condron, D. J. (2016). Fifty years since the Coleman Report: Rethinking the relationship between schools and inequality. *Sociology of Education*, 89(3), 207-220. <https://doi.org/10.1177/0038040716651676>.
- Dunham, H. (2025). Voices from the other side: leadership practices teachers value for equity systems change. *The Interactive Journal of Global Leadership and Learning*, 4(2), 3.
<https://orcid.org/0000-0002-8251-3859>.
- Dworkin, R. (2000). *Sovereign Virtue: The Theory and Practice of Equality*. Cambridge, MA: Harvard University Press.
- Edgar, S. (2022a). The Tricky Concept of 'Educational Equity'—In Search of Conceptual Clarity. *Scottish Educational Review*, 54(1), 3-25.
<https://doi.org/https://doi.org/10.1163/27730840-54010002>
- Edgar, S. (2022b). A curriculum for equity? changing notions of equity in educational policy and scotland's curriculum for excellence. *PhD thesis, University of Stirling, Scotland*.
- Edmunds, R. (1982). Programs of school improvement: an overview. *Association for Supervision and Curriculum Development. Educational Leadership*. Volume 40, Number 3.

- Education Scotland (2026). *Into Headship*. <https://education.gov.scot/professional-learning/professional-learning-programmes-webinars-and-events/programmes/into-headship/>.
- Education Scotland. (2024). *National Improvement Framework*. <https://education.gov.scot/parentzone/curriculum-in-scotland/national-improvement-framework/>
- Education Scotland. (2025). *What is Curriculum for Excellence?* <https://education.gov.scot/curriculum-for-excellence/about-curriculum-for-excellence/what-is-curriculum-for-excellence/>
- Education Scotland. (n.d.). *Welcome to Education Scotland*. <https://education.gov.scot>
- Education Wales. (2020). Health and Well-being. <https://hwb.gov.wales/curriculum-for-wales/health-and-well-being>
- Ehren, M. C. M., Jones, K., & Perryman, J. (2016). *Side effects of school inspection: motivations and contexts for strategic responses*. In M. C. M. Ehren (Ed.), *Methods and modalities of effective school inspections* (pp. 87–109). Springer. https://doi.org/10.1007/978-3-319-31003-9_5.
- Ehrich, L., Harris, J., Klenowski, V., Smeed, J., & Ainscow, M. (2015). Ethical leadership in a time of increasing accountability. *Leading and Managing*, 21(1), pp. 22-35.
- Eisenhardt, K. M., & Graebner, M. E. (2007). Theory building from cases: Opportunities and challenges. *Academy of Management Journal*, 50(1), 25-32. <https://doi.org/10.5465/amj.2007.24160888>.
- Elfert, M. (2015). Learning to live together: Revisiting the humanism of the Delors Report. *Education Research and Foresight Working Papers Series*, 12.

- Elfert, M., & Ydesen, C. (2023). *Global governance of education: The historical and contemporary entanglements of UNESCO, the OECD and the World Bank* (Vol. 24). Springer, NY.
- Enchikova, E., Neves, T., Toledo, C. and Nata, G., (2025). A long road to educational equity: Tracking trends through PISA 2000–2018. *International Journal of Educational Research Open*, 8, p.100445.
- Espinoza, O. (2007). Solving the equity–equality conceptual dilemma: a new model for analysis of the educational process. *Educational Research*, 49(4), pp. 343-363.
- Esteban-Guitart, M., & Moll, L. C. (2014). Funds of identity: A new concept based on the funds of knowledge approach. *Culture & psychology*, 20(1), 31-48.
<https://doi.org/10.1177/1354067X13515934>
- Fahey, G., & Köster, F. (2019). Means, ends and meaning in accountability for strategic education governance. *OECD Education Working Papers*, (204).
- Feher, M. (2009). Self-appreciation; or, the aspirations of human capital. *Public Culture*, 21(1), 21-41. <https://doi.org/10.1215/08992363-2008-019>
- Field, S., Kuczera, M., & Pont, B. (2007). *No More Failures: Ten Steps to Equity in Education*. OECD Publishing, Paris. <https://doi.org/10.1787/19901496>
- Firth, J., Beck, A., & Wilson, C. (2025). Headteacher engagement with Pupil Equity Funding: Autonomy, evidence and networks. *Educational Management Administration & Leadership*, 0(0). <https://doi.org/10.1177/17411432251343994>.
- Forde, C., & Torrance, D. (2021). Leadership at all levels: system alignment through empowerment in Scottish education? *School Leadership & Management*, 41(1–2), 22–40. <https://doi.org/10.1080/13632434.2020.1825372>.
- Fowler, L. (2023). Strategies for dealing with policy ambiguities. *Public Administration*, 101(4), 1394-1407. <https://doi.org/10.1111/padm.12887>

- Frønes, T. S., Pettersen, A., Radišić, J., & Buchholtz, N. (2020). *Equity, equality and diversity in the Nordic model of education*. Springer. https://doi.org/10.1007/978-3-030-61648-9_1
- Fullan, M. (2025). *Leadership for system change in education: you have to be there*. *Australian Educational Leader*, 47(3), 8-13
- Fullan, M. (2025). *The New Meaning of Educational Change*. (6th edition). New York: Teachers College Press.
- Fullan, M. (2021). *The right drivers for whole system success*. Centre for Strategic Education.
- Furger, R. C., Hernández, L. E., & Darling-Hammond, L. (2019). *The California Way: The Golden State's quest to build an equitable and excellent education system* (Report). Learning Policy Institute.
- Gerring, J., & Cojocaru, L. (2016). Selecting Cases for Intensive Analysis: A Diversity of Goals and Methods: A Diversity of Goals and Methods. *Sociological Methods & Research*, 45(3), 392-423. <https://doi.org/10.1177/0049124116631692>
- Gibton, D. (2015). *Researching Education Policy, Public Policy, and Policymakers: Qualitative methods and ethical issues* (1st ed.). Routledge. <https://doi.org/10.4324/9781315775722>
- Gillborn, D. (2008). Coincidence or conspiracy? Whiteness, policy and the persistence of the Black/White achievement gap. *Educational Review*, 60(3), pp. 229-248.
- Gillies, D. (2018). The history of Scottish education since devolution. In. *Scottish Education: Fifth Edition*, Edinburgh University Press, pp. 108-117.
- Glette, M. K., & Wiig, S. (2022). The Headaches of Case Study Research: A Discussion of Emerging Challenges and Possible Ways Out of the Pain. *The Qualitative Report*, 27(5), 1377-1392. <https://doi.org/10.46743/2160-3715/2022.5246>.

- Glick-Schiller, N. (2015). Explanatory frameworks in transnational migration studies: the missing multi-scalar global perspective. *Ethnic and Racial Studies*, 38(13), 2275–2282. <https://doi.org/10.1080/01419870.2015.1058503>
- Goode, H., Drysdale, L., & Gurr, D. (2023). What we know about successful school leadership from Australian cases and an open systems model of school leadership. *Education Sciences*, 13(11), 1142. <https://doi.org/10.3390/educsci13111142>.
- Gorur, R. (2024). The sociology of measurement. In *Handbook on Measuring Governance* (pp. 111-124). Edward Elgar Publishing. <https://doi.org/10.4337/9781802200645.00016>
- Government of South Australia Department for Education. (n.d.) Our Strategy for Public Education in South Australia. <https://www.education.sa.gov.au/purpose-media/Public-Education-Strategic-Plan.pdf>
- Grissom, J. A., Egalite, A. J., & Lindsay, C. A. (2021). How principals affect students and schools. *Wallace Foundation*, 2(1), 30-41. <https://cahnfellowsprograms.org/wp-content/uploads/2021/11/How-Principals-Affect-Students-and-Schools.pdf>.
- Guetterman, T., C. (2015). Descriptions of sampling practices within five approaches to qualitative research in education and the health sciences. *Forum: Qualitative Social Research* 16(2): 25. <http://nbn-resolving.de/urn:nbn:de:0114-fqs1502256>
- Gutiérrez, R. (2002). Enabling the practice of mathematics teachers in context: toward a new equity research agenda. *Mathematical Thinking and Learning*, 4(2-3), 145-187. https://doi.org/10.1207/S15327833MTL04023_4.
- Hamann, E.T. and Rosen, L. (2011). What Makes the Anthropology of Educational Policy Implementation ‘Anthropological’?. In *A Companion to the Anthropology of*

- Education (eds B.A.U. Levinson and M. Pollock). <https://doi.org/10.1002/9781444396713.ch27>
- Hardy, I. (2015). Curriculum reform as contested: An analysis of curriculum policy enactment in Queensland, Australia. *International Journal of Educational Research*, 74, 70-81. <https://doi.org/10.1016/j.ijer.2015.09.010>.
- Hargreaves, A. (2015). Autonomy and transparency: Two good ideas gone bad. In *Flip the System* (pp. 120-133). Routledge.
- Hargreaves, A. (2020). Large-scale assessments and their effects: The case of mid-stakes tests in Ontario. *Journal of Educational Change* 21, 393–420. <https://doi.org/10.1007/s10833-020-09380-5>
- Hargreaves, A., & Goodson, I. (2006). Educational change over time? The sustainability and nonsustainability of three decades of secondary school change and continuity. *Educational administration quarterly*, 42(1), 3-41.
- Hargreaves, A., & O'Connor, M. T. (2018). *Collaborative professionalism: When teaching together means learning for all*. Corwin Press.
- Harland, T. (2014). Learning about case study methodology to research higher education. *Higher Education Research & Development*, 33(6), 1113–1122. <https://doi.org/10.1080/07294360.2014.911253>
- Harris, A. (2004). Distributed leadership and school improvement: Leading or misleading? *Educational Management Administration & Leadership*, 32: 1, 11–24. <https://doi.org/10.1177/1741143204039297>
- Harris, A., & Jones, M. (2019). *Leading for equity*. *School Leadership & Management*, 39(5), 391–393. <https://doi.org/10.1080/13632434.2019.1669788>
- Harris, A., & Jones, M. S. (2019). *System Recall: Leading for Equity and Excellence in Education*. SAGE Publications/Corwin.

- Harris, A., & Zhao, Y. (2015). PISA's potentially dangerous problems — and what to do about them. *The Washington Post*. <https://www.washingtonpost.com/news/answer-sheet/wp/2015/04/19/pisas-potentially-dangerous-problems-and-what-to-do-about-them/>
- Harris, J., Carrington, S., & Ainscow, M. (2017). *Promoting equity in schools. Collaboration, inquiry and ethical leadership*. Routledge.
- Harris, A., Elder, Z., Suzette Jones, M., & Cooze, A. (2022). Schools as Learning Organisations in Wales: Exploring the Evidence. *Wales Journal of Education*, 24/1. <https://doi.org/10.16922/wje.24.1.3>
- Hart, T. D., DeMatthews, D. E., & Gümüş, S. (2025). Defining and enacting social justice leadership: an examination of principal and assistant principal perceptions. *Leadership and Policy in Schools*, 1–22. <https://doi.org/10.1080/15700763.2025.2462066>.
- Harvie, J., Robertson, Z., & Brack, K. (2024). Enhancing the agency of senior school leaders through professional learning: a qualitative study of into headship, the national headteacher preparation programme in Scotland. *Professional Development in Education*, 1–15. <https://doi.org/10.1080/19415257.2024.2366336>.
- Hatch, T. (2024). *On the Inertia of Education Systems and Hope for the Future: A Conversation with Jón Torfi Jónasson on Educational Change in Iceland (Part 1)*. International Education News. <https://internationalednews.com/2024/04/24/on-the-inertia-of-education-systems-and-hope-for-the-future-a-conversation-with-jon-torfi-jonasson-on-educational-change-in-iceland-part-1/>
- Haxhiu, Z. (2022). Closing the achievement gap: an analysis of equity-based educational interventions. *Journal of Education Review Provision*, 2(2), pp. 44-53.

- Hayward, L. (2023). *It's our future: Report of the Independent Review of Qualifications and Assessment*. Scottish Government. <https://www.gov.scot/publications/future-report-independent-review-qualifications-assessment/>.
- Hayward, L., Baird, J. A., Allan, S., Godfrey-Faussett, T., Hutchinson, C., MacIntosh, E., Randhawa, A., Spencer, E., and Wiseman-Orr, M. L. (2023). National qualifications in Scotland: a lightning rod for public concern about equity during the pandemic. *European Journal of Education*, 58(1), pp. 83-97.
- Healy, T., & Istance, D. (2001). International equity indicators in education and learning in industrialized democracies. In W. Hutmacher, D. Cochrane, & N. Bottani (Eds.), *In Pursuit of Equity in Education: Using International Indicators to Compare Equity Policies* (pp. 195-215). Springer Netherlands. https://doi.org/10.1007/0-306-47579-0_8
- Hennink, M. M., Kaiser, B. N., & Weber, M. B. (2019). What influences saturation? Estimating sample sizes in focus group research. *Qualitative health research*, 29(10), 1483-1496. <https://doi.org/10.1177/1049732318821692>
- Heyneman, S. P. (1999). The sad story of UNESCO's education statistics. *International Journal of Educational Development*, 19(1), 65-74.
- Heyneman, S. P. (2003). The history and problems in the making of education policy at the World Bank 1960–2000. *International Journal of Educational Development*, 23(3), 315-337. [https://doi.org/10.1016/S0738-0593\(02\)00053-6](https://doi.org/10.1016/S0738-0593(02)00053-6)
- Hickey, A., & Riddle, S. (2025). Performative enactments of pedagogy in the classroom: strategies and tactics of relationality. *Pedagogy, Culture & Society*, 33(1), 69–84. <https://doi.org/10.1080/14681366.2023.2187438>
- Hickey, A., Riddle, S., Robinson, J., Down, B., Hattam, R., & Wrench, A. (2022). Relational pedagogy and the policy failure of contemporary Australian schooling: activist

- teaching and pedagogically driven reform. *Journal of Educational Administration and History*, 54(3), 291–305. <https://doi.org/10.1080/00220620.2021.1872508>.
- Hopkins, D. (2013). Exploding the myths of school reform. *School Leadership & Management*, 33:4, 304-321. <https://doi.org/10.1080/13632434.2013.793493>
- Hossain, M. (2024). Perceptions of key education actors towards PISA: the case of Scotland. *Oxford Review of Education*, 50(1), pp. 113-130.
- Howlett, M., Ramesh, M., & Capano, G. (2020). Policy-Makers, Policy-Takers and Policy Tools: Dealing with Behaviourial Issues in Policy Design. *Journal of Comparative Policy Analysis: Research and Practice*, 22(6), 487–497. <https://doi.org/10.1080/13876988.2020.1774367>
- Huber, S. G., & West, M. (2002). Developing school leaders: A critical review of current practices, approaches and issues, and some directions for the future. *Second international handbook of educational leadership and administration*, 1071-1101. https://doi.org/10.1007/978-94-010-0375-9_37.
- Husén, T., & Postlethwaite, T. N. (1996). a brief history of the international association for the evaluation of educational achievement (TEA). *Assessment in Education: Principles, Policy & Practice*, 3(2), 129-141. <https://doi.org/10.1080/0969594960030202>
- Istance, D. (1997). *Education and Equity in OECD Countries*. OECD Publishing, Paris. <https://files.eric.ed.gov/fulltext/ED429024.pdf>
- Iversen, J. S. (2006). Futures thinking methodologies and options for education. *Centre for Educational Research and Innovation, Schooling for Tomorrow: Think Scenarios, Rethink Education*, 107-122.
- Jackson, T. A. (2023). The great equalizer?: Poverty, reproduction, and how schools structure inequality. In *The poverty and education reader* (pp. 117-130). Routledge.

- Jencks, C. (1988). Whom must we treat equally for educational opportunity to be equal? *Ethics*, 98(3), pp. 518-533.
- Jennings, J. L., Deming, D., Jencks, C., Lopuch, M., & Schueler, B. E. (2015). Do Differences in School Quality Matter More Than We Thought? New Evidence on Educational Opportunity in the Twenty-first Century. *Sociology of Education*, 88(1), 56-82. <https://doi.org/10.1177/0038040714562006>.
- Jennings, J., & Sohn, H. (2014). Measure for Measure: How Proficiency-based Accountability Systems Affect Inequality in Academic Achievement: How Proficiency-based Accountability Systems Affect Inequality in Academic Achievement. *Sociology of Education*, 87(2), 125-141. <https://doi.org/10.1177/0038040714525787>
- Kantor, H., & Lowe, R. (1995). Class, race, and the emergence of federal education policy: from the new deal to the great society. *Educational Researcher*, 24(3), 4-21. <https://doi.org/10.3102/0013189X024003004>
- Kantor, H., & Lowe, R. (2017). Introduction: What difference did the Coleman report make? *History of Education Quarterly*, 57(4), 570-578. <https://doi.org/10.1017/heq.2017.32>
- Keddie, A. (2015). School autonomy as ‘the way of the future’: Issues of equity, public purpose and moral leadership: Issues of equity, public purpose and moral leadership. *Educational Management Administration & Leadership*, 44(5), 713-727. <https://doi.org/10.1177/1741143214559231>.
- Keddie, A. (2017). School autonomy reform and public education in Australia: implications for social justice. *Australian Educational Researcher*. 44, 373–390. <https://doi.org/10.1007/s13384-017-0243-x>

- Keddie, A., & Holloway, J. (2020). School autonomy, school accountability and social justice: stories from two Australian school principals. *School Leadership & Management*, 40(4), 288–302. <https://doi.org/10.1080/13632434.2019.1643309>.
- Keddie, A., Claire MacDonald, K., Blackmore, J., Eacott, S., Gobby, B., Mahoney, C., Wilkinson, J. (2020). School autonomy, marketisation and social justice: the plight of principals and schools. *Journal of Educational Administration and History*, 52(4), 432–447. <https://doi.org/10.1080/00220620.2020.1818699>.
- Keddie, A., MacDonald, K., Blackmore, J., Boyask, R., Fitzgerald, S., Gavin, M., & Yoon, E. S. (2023). What needs to happen for school autonomy to be mobilised to create more equitable public schools and systems of education?. *The Australian Educational Researcher*, 50(5), 1571-1597. <https://doi.org/10.1007/s13384-022-00573-w>
- Kenway, J., & Boden, R. (2025). The ‘better and fairer schools agreement’; fairer funding but not fair. *The Australian Educational Researcher*, 52, pp. 2999-3019. <https://doi.org/10.1007/s13384-025-00860-2>.
- Kerr, K., & Ainscow, M. (2024). The development of a methodology for enhancing equity within education systems. *International Journal of Research & Method in Education*, 47(2), 99–113. <https://doi.org/10.1080/1743727X.2023.2231862>
- Khalifa, M. A., Gooden, M. A., & Davis, J. E. (2016). Culturally Responsive School Leadership: A Synthesis of the Literature: A Synthesis of the Literature. *Review of Educational Research*, 86(4), 1272-1311. <https://doi.org/10.3102/0034654316630383>.
- Kim, M. J. (2024). Scripting solutions for the future: the OECD’s advocacy of happiness and well-being. *Comparative Education*, 1-17. <https://doi.org/10.1080/03050068.2024.2354638>
- Kitsing, M., Boyle, A., Kukemelk, H. and Mikk, J. (2016). The impact of professional

- capital on educational excellence and equality in Estonia. *Journal of Professional Capital and Community*. Vol. 1 No. 3, pp. 237-252. <https://doi.org/10.1108/JPCC-03-2016-0003>
- Klees, S. J., & Qargha, O. (2014). Equity in education: The case of UNICEF and the need for participative debate. *Prospects*, 44, 321-333.
- Komatsu, H., & Rappleye, J. (2021). Rearticulating PISA. *Globalisation, Societies and Education*, 19(2), 245-258. <https://doi.org/10.1080/14767724.2021.1878014>
- Kristjánsson, K. (2023). The new flourishing agenda in education: a report on the current theoretical state of play. *OECD Publishing*.
- Lan, S. (2014). State Regulation of Undocumented African Migrants in China: A Multi-scalar Analysis. *Journal of Asian and African Studies*, 50(3), 289-304. <https://doi.org/10.1177/0021909614531903>
- Leithwood, K. (2021). *A review of evidence about equitable school leadership*. *Education sciences*, 11(8), 377. <https://doi.org/10.3390/educsci11080377>.
- Leithwood, K., Harris, A., & Hopkins, D. (2019). Seven strong claims about successful school leadership revisited. *School Leadership & Management*. <https://doi.org/10.1080/13632434.2019.1596077>
- Levin, H. M. (2009). The economic payoff to investing in educational justice. *Educational researcher*, 38(1), 5-20. <https://doi.org/10.3102/0013189X083311>
- Levinson, M., Geron, T., & Brighthouse, H. (2022). Conceptions of educational equity. *AERA Open* 8. <https://doi.org/10.1177/23328584221121344>
- Lingard, B. (2014). *Politics, policies and pedagogies in education. The selected work of Bob Lingard*. Routledge.

- Lingard, B., & Rawolle, S. (2011). New scalar politics: implications for education policy. *Comparative Education*, 47(4), 489–502.
<https://doi.org/10.1080/03050068.2011.555941>
- Lingard, B., Sellar, S., & Savage, G. C. (2014). Re-articulating social justice as equity in schooling policy: the effects of testing and data infrastructures. *British Journal of Sociology of Education*, 35(5), pp. 710-730.
<https://doi.org/10.1080/01425692.2014.919846>
- Liu, S. (2025). Navigating equality in schools: the sociological impact of leadership on student success. *Education and Urban Society*, 57(3), 245-298.
<https://doi.org/10.1177/00131245241304404>.
- Lundgren, U. P. (2002) Political Governing of the Education Sector: Reflections on Change, *Studies in Educational Policy and Educational Philosophy*, 2002:1, DOI: 10.1080/16522729.2002.11803855
- Mader, P. (2024). *Principal associations: the struggle for political agency in neoliberalising policy regimes*. PhD thesis, Flinders University, Adelaide.
- Mann, H. (1890). *Annual reports of the secretary of the board of education of Massachusetts for the years 1845–1848*. Lee & Shephard Publishers.
- McGaw, B. (2008). The role of the OECD in international comparative studies of achievement. *Assessment in Education: Principles, Policy & Practice*, 15(3), 223-243. <https://doi.org/10.1080/09695940802417384>
- McGuire, J.M. (2022). Margaret Thatcher’s UK School Reforms -Aims, Impact, and Legacy, *Social and Education History*, 11(3), 228-244
<http://doi.org/10.17583/hse.10645>

- McKay, A. (2018). The influence of school context on school improvement policy enactment: An Australian case study. *International Journal of Leadership in Education*, 21(6), 621–632. <https://doi.org/10.1080/13603124.2018.1463461>.
- McLaughlin, M. W. (1987). Learning from experience: lessons from policy implementation. *Educational Evaluation and Policy Analysis*, 9(2), 171–178. <https://doi.org/10.3102/01623737009002171>.
- Merriam, S. B., & Tisdell, E. J. (2015). *Qualitative research: a guide to design and implementation*. John Wiley & Sons.
- Meyer, H. D., & Zahedi, K. (2014). Open Letter to Andreas Schleicher, OECD, Paris. *Policy Futures in Education*, 12(7). <https://doi.org/10.2304/pfie.2014.12.7.872>
- Ministers' Media Centre. (2023). Expert panel to inform a better and fairer education system. <https://ministers.education.gov.au/clare/expert-panel-inform-better-and-fairer-education-system>
- Molla, T. (2025). School disengagement as a policy problem: a frame analysis. *Critical Policy Studies*, 19(4), 535–554. <https://doi.org/10.1080/19460171.2024.2423376>
- Molla, T., & Gale, T. (2019). Positional matters: school leaders engaging with national equity agendas. *Journal of Education Policy*, 34:6, pp. 858-876. <https://doi.org/10.1080/02680939.2018.1556811>
- Mowat, J. G. (2017). Closing the attainment gap – a realistic proposition or an elusive pipe-dream? *Journal of Education Policy*, 33(2), pp. 299–321.
- Mueller, J. T., & Brooks, M. M. (2020). Burdened by renewable energy? A multi-scalar analysis of distributional justice and wind energy in the United States. *Energy Research & Social Science*, 63, 101406.

- Muir, K. (2022). *Putting Learners at the Centre: Towards a Future Vision for Scottish Education*. <https://www.gov.scot/publications/putting-learners-centre-towards-future-vision-scottish-education/>
- Mundy, K. (1999). Educational multilateralism in a changing world order: UNESCO and the limits of the possible. *International Journal of Educational Development*, 19(1), 27-52. [https://doi.org/10.1016/S0738-0593\(98\)00054-6](https://doi.org/10.1016/S0738-0593(98)00054-6)
- Nachbauer, M. (2024). How schools affect equity in education: teaching factors and extended day programs associated with average achievement and socioeconomic achievement gaps. *Studies in Educational Evaluation*, 82 (101367), pp. 1-12.
- National Academies of Sciences, Engineering, & Medicine. (2019). *Monitoring educational equity*. Washington, DC: National Academies Press. <https://doi.org/10.17226/25389>
- National Research Council. (1995). *International Comparative Studies in Education: Descriptions of Selected Large-Scale Assessments and Case Studies*. Washington, DC: The National Academies Press. <https://doi.org/10.17226/9174>
- Ng, P. T. (2017). *Learning from Singapore: The power of paradoxes*. Taylor & Francis.
- Nguyen, P. (2025). District leaders' sensemaking about equity and school mathematics: Implications for the design of equity-minded policies in specific subjects. *Journal of the Learning Sciences*, 1–43. <https://doi.org/10.1080/10508406.2025.2572775>
- Noguera, P. (2005). The racial achievement gap: how can we assure an equity of outcomes. In. *Urban education with an Attitude*, SUNY Press, pp. 11-20.
- Noltemeyer, A. L., Mujic, J., and McLoughlin, C. S. (2012). The history of inequality in education. In A.L. Noltemeyer & C.S. McLoughlin (Eds.), *Disproportionality in Education and Special Education*. Springfield, IL: Charles C. Thomas Publisher Ltd., pp. 3-22.

- Noyes, A. (2013). Scale in education research: towards a multi-scale methodology. *International Journal of Research & Method in Education*, 36(2), 101–116. <https://doi.org/10.1080/1743727X.2012.683648>
- Nyumba, O. T., Wilson, K., Derrick, C. J., & Mukherjee, N. (2018). The use of focus group discussion methodology: Insights from two decades of application in conservation. *Methods in Ecology and evolution*, 9(1), 20-32.
<https://doi.org/10.1111/2041-210X.12860>
- OECD. (2001). *Knowledge and skills for life: first results from PISA 2000*. OECD Publishing, Paris. <https://doi.org/10.1787/9789264195905-en>
- OECD. (2004). *Learning for tomorrow's world: first results from PISA 2003*. OECD Publishing, Paris. <https://doi.org/10.1787/9789264006416-en>
- OECD. (2007). *PISA 2006: Science Competencies for Tomorrow's World: Volume 1: Analysis*. OECD Publishing, Paris. <https://doi.org/10.1787/9789264040014-en>
- OECD. (2007). *Quality and Equity of Schooling in Scotland*. OECD Publishing.
- OECD. (2009). *Equally prepared for life?: How 15-year-old boys and girls perform in school*. OECD Publishing, Paris. <https://doi.org/10.1787/9789264064072-en>
- OECD. (2012). *Equity and quality in education, supporting disadvantaged students and schools*. OECD Publishing. <https://doi.org/10.1787/9789264130852-en>
- OECD. (2015). *Education Policy Outlook 2015: making reforms happen*. OECD Publishing, Paris. <https://doi.org/10.1787/9789264225442-en>
- OECD. (2015). *Improving Schools in Scotland: An OECD Perspective*. OECD Publishing.
- OECD. (2016). *School Leadership for Learning: Insights from TALIS 2013*. OECD Publishing. <https://doi.org/10.1787/9789264258341-en>
- OECD. (2017). *PISA 2015 Results (Volume III): Students' Well-Being*, PISA, OECD Publishing, Paris, <https://doi.org/10.1787/9789264273856-en>

- OECD. (2018). *Equity in education: breaking down barriers to social mobility*. OECD Publishing.
- OECD. (2018). *The Future of Education and Skills: Education 2030, OECD Education Policy Perspectives*, No. 98, OECD Publishing, Paris. <https://doi.org/10.1787/54ac7020-en>
- OECD. (2019). *TALIS 2018 results (Volume I): Teachers and school leaders as lifelong learners*. OECD Publishing.
- OECD. (2019a). *PISA 2018 Results (Volume III): What School Life Means for Students' Lives*. OECD Publishing, Paris. <https://doi.org/10.1787/19963777>
- OECD. (2019b). *PISA 2018 Results (Volume II): Where All Students Can Succeed*. OECD Publishing. <https://doi.org/10.1787/b5fd1b8f-en>
- OECD. (2020a). *PISA 2018 Results (Volume V): Effective Policies, Successful Schools*. OECD Publishing, Paris. <https://doi.org/10.1787/ca768d40-en>
- OECD. (2020b). An implementation framework for effective change in schools. *OECD Education Policy Perspectives No. 9*. OECD Publishing, Paris.
- OECD. (2021). Adapting curriculum to bridge equity gaps: towards an inclusive curriculum. OECD Publishing, Paris. <https://doi.org/10.1787/6b49e118-en>
- OECD. (2021). *Scotland's curriculum for excellence: into the future, implementing education policies*. OECD Publishing.
- OECD. (2023a). *PISA 2022 Results (Volume I): The State of Learning and Equity in Education, PISA*. OECD Publishing.
- OECD. (2023a). *PISA 2022 Results (Volume II)*. OECD Publishing, Paris. <https://doi.org/10.1787/a97db61c-en>
- OECD. (2023c). *Equity and Inclusion in Education: Finding Strength through Diversity*. OECD Publishing, Paris. <https://doi.org/10.1787/e9072e21-en>

OECD. (2023d). *High Performing Systems for Tomorrow: 2023 Conceptual Framework*.

<https://www.oecd.org/en/about/projects/pisa-high-performing-systems-for-tomorrow-hpst.html#reports>

OECD. (2023e). *PISA Research, Development and Innovation (RDI) Programme*. Retrieved

30 August from <https://www.oecd.org/en/about/projects/pisa-rdi-programme.html>

OECD. (2025). *Results from TALIS 2024: The State of Teaching*. OECD Publishing.

OECD. (2025). *Reducing Inequalities by Investing in Early Childhood Education and Care, Starting Strong*. OECD Publishing, Paris. <https://doi.org/10.1787/b78f8b25-en>

OECD. (n.d.-a). *Education equity*. <https://www.oecd.org/en/data/dashboards/education-equity.html>

OECD. (n.d.-b). *The OECD Learning Compass 2030*.

<https://www.oecd.org/en/data/tools/oecd-learning-compass-2030.html>

OECD. (2025), *Education at a Glance 2025: OECD Indicators*, OECD Publishing.

<https://doi.org/10.1787/1c0d9c79-en>

Oliver, K., Lorenc, T., Tinkler, J., & Bonell, C. (2019). Understanding the unintended

consequences of public health policies: the views of policymakers and

evaluators. *BMC public health*, 19(1), 1057. [https://doi.org/10.1186/s12889-019-](https://doi.org/10.1186/s12889-019-7389-6)

[7389-6](https://doi.org/10.1186/s12889-019-7389-6)

Orbis. (2025). *Reflections on real intelligence, paradox and purpose*.

<https://www.education.sa.gov.au/orbis/blog/reflections-on-real-intelligence,-paradox-and-purpose>

Orchard, H., Hickey, A., & Riddle, S. (2025). The aporia of education policy: national school reform and the limits of policy enactment. *Discourse: Studies in the Cultural Politics of Education*, 46(2), 179–193. <https://doi.org/10.1080/01596306.2024.2400236>.

- Orygen. (2024). *Landmark Lancet Psychiatry Commission Sounds Alarm, Calling for Urgent Global Action to Address Youth Mental Health Crisis*. Retrieved 15 August from <https://www.orygen.org.au/About/News-And-Events/2024/LANDMARK-LANCET-PSYCHIATRY-COMMISSION-SOUNDS-ALARM>
- Pak Tee, N. (2008). Education policy rhetoric and reality gap: A reflection. *International Journal of Educational Management*, 22(6), 595-602.
<https://doi.org/10.1108/09513540810895471>
- Pang, V. O., Han, P. P., and Pang, J. M. (2011). Asian American and Pacific Islander students: Equity and the achievement gap. *Educational Researcher*, 40(8), pp. 378-389.
- Parker, P., Marsh, H., Jerrim, J., Guo, J., & Dicke, T. (2018). Inequity and Excellence in Academic Performance: Evidence From 27 Countries. *American Educational Research Journal*, Vol. 55(No. 4), 836–858.
<https://doi.org/10.3102/0002831218760213>
- Parks, R. G., Thomas, F., Morshed, A. B., Dodson, E. A., Tian, R., Politi, M. C., & Brownson, R. C. (2023). Municipal officials’ perspectives on policymaking for addressing obesity and health equity. *Evidence & Policy*, 19(3), 444-464.
<https://doi.org/10.1332/174426421X16793276974116>
- Paterson, L. (2024). Falling attainment and rising inequality. *Scottish Affairs*, 33(2). <https://doi.org/10.3366/scot.2024.0497>
- Patton, M., Q. (2002). *Qualitative Research and Evaluation Methods*. Sage.
- Perry, L. B. (2025). Tensions undermining equitable school funding: insights from Australia. *Journal of Educational Administration and History*, 57(1), pp. 56-73.
- Perry, L., E. S. Yoon, M. Sciffer, and C. Lubienski. (2024). The Impact of Marketization on School Segregation and Educational Equity and Effectiveness: Evidence from

- Australia and Canada.”*International Journal of Comparative Sociology*.
<https://doi.org/10.1177/00207152241227810>.
- Piketty, T. (2014). *Capital in the twenty-first century*. Harvard University Press.
- Pont, B. (2004). Improving access to and participation in adult learning in oecd countries.
European Journal of Education, 39(1), 31-45. <http://www.jstor.org/stable/1503749>
- Popkewitz, T. S., Feng, J., & Zheng, L. (2018). Calculating the future: the historical
 assemblage of empirical evidence, benchmarks & PISA. *ECNU Review of Education*,
 1(1), 107-118. <https://doi.org/10.30926/ecnuoe2018010106>
- Priestley, M., and Humes, W. (2010). The development of Scotland’s Curriculum for
 Excellence: amnesia and déjà vu. *Oxford Review of Education*, 36(3), pp. 345-361.
- Quilabert, E. (2024). *The school improvement maze: A multi-level analysis of educational
 reform in Catalonia* (Doctoral thesis, Universitat Autònoma de Barcelona). UAB
 Digital Repository. <https://ddd.uab.cat/record/305577?ln=en>
- Quinn, J., & Fullan, M. (2017). Coherence making: Whole system change strategy. In *Future
 Directions of Educational Change* (pp. 223-237). Routledge.
- Raffe, D. (2008). As others see us: a commentary on the OECD review of the Quality and
 Equity of Schooling in Scotland. *Scottish Educational Review*, 40(1), 22-36.
[http://www.scotedreview.org.uk/view_issue.php?id=40\[1\]](http://www.scotedreview.org.uk/view_issue.php?id=40[1])
- Ravitch, D. (2016). *The death and life of the great American school system: how testing and
 choice are undermining education*. Basic Books.
- Rawls, J. (1971). *A Theory of Justice*. Cambridge, Belknap Press.
- Rawls, J. (2001). *Justice as Fairness: A Restatement*. The Belknap Press of Harvard
 University Press.

- Reardon, S. F., Weathers, E. S., Fahle, E. M., Jang, H., and Kalogrides, D. (2024). Is separate still unequal? New evidence on school segregation and racial academic achievement gaps. *American sociological review*, 89(6), pp. 971-1010.
- Reid, A. (2019). *Changing Australian Education: How Policy is Taking us Backwards and What Can be Done About it*. Routledge.
- Rezai-Rashti, G. M., Segeren, A., & Abdmolaei, S. (2024). Equity, Standardization, and Educators' Perspectives on the Enactment of Large-Scale Standardized Testing: A Case Study of Urban Schools in Ontario, Canada. *World Studies in Education*, 24(1), 41-67. <https://doi.org/10.7459/wse/240104>.
- Riddle, S. (2024). Toward schools as sites of radical democratization: New possibilities for democratic education. *Communication and education: Promoting peace and democracy in times of crisis and conflict*, 17-30.
<https://doi.org/10.1002/9781119985280.ch2>
- Riddle, S., & Cleaver, D. (2015). Working within and against the grain of policy in an alternative school. *Discourse: Studies in the Cultural Politics of Education*, 38(4), 498–510. <https://doi.org/10.1080/01596306.2015.1105790>.
- Rivas, A. (2023). The long road to systemic improvement in education: a comparative multi-level case study in federal countries. *Comparative Education*, 59(1), 77–98.
<https://doi.org/10.1080/03050068.2022.2133860>.
- Rizvi, F., & Lingard, B. (2010). *Globalizing Education Policy*. Routledge.
- Robertson, S. L. (2022). Guardians of the future: international organisations, anticipatory governance and education. *Global Society*, 36(2), 188-205.
<https://doi.org/10.1080/13600826.2021.2021151>
- Robertson, S. L., & Navia, C. C. (2024). 'Agency work': teachers, the OECD, and the 'happiness turn'. In T. Sorensen, X. Dumay, & L. Paine (Eds.), *World Yearbook of*

Education 2025: The Teaching Profession in a Globalizing World: Governance, Career, Learning (1st ed.). Routledge.

<https://doi.org/https://doi.org/10.4324/9781003441731>

Robertson, S., & Dale, R. (2017). Comparing policies in a globalizing world: methodological reflections. *Educação & Realidade*, 42, 859–876.

Roegman, R. (2017). How contexts matter: a framework for understanding the role of contexts in equity-focused educational leadership. *Journal of School Leadership*, 27(1), 6-30.

Roegman, R., Perkins-Williams, R., Budzyn, M., Killian-Tarr, O., & Allen, D. (2022). How conceptions of equity inform principal data use: A purposeful examination of principals from four school districts. *Educational Administration Quarterly*, 58(2), 183-222. <https://doi.org/10.1177/0013161X211056084>

Roemer, J. (1998). *Equality of Opportunity*. Cambridge, Harvard University Press.

Roemer, J., and Trannoy, A. (2016). *Equality of Opportunity: Theory and Measurement*. *Journal of Economic Literature* 54 (4), pp. 1288–1332.

Rowe, E. E., & Lubienski, C. (2017). Shopping for schools or shopping for peers: Public schools and catchment area segregation. *Journal of Education Policy*, 32(3), 340-356. <https://doi.org/10.1080/02680939.2016.1263363>

Sahlberg, P. (2015). *Finnish Lessons 2.0: What Can the World Learn from Educational Change in Finland?* Teachers College Press.

Sahlberg, P. (2016). The global educational reform movement and its impact on schooling. *The handbook of global education policy*, 128-144. <https://doi.org/10.1002/9781118468005.ch7>

Sahlberg, P. (2019). “No need to panic – we can fix Australian schools. But to rush the reform is to ruin it.” *The Guardian*.

<https://www.theguardian.com/commentisfree/2019/dec/09/no-need-to-panic-we-can-fix-australian-schools-but-to-rush-the-reform-is-to-ruin-it>

Sahlberg, P. (2023). Trends in global education reform since the 1990 s: Looking for the right way. *International Journal of Educational Development*, 98, 102748.

<https://doi.org/10.1016/j.ijedudev.2023.102748>.

Sahlberg, P., & Cobbold, T. (2021). Leadership for equity and adequacy in education. *School Leadership & Management*, 41:4-5, 447-469.

<https://doi.org/https://doi.org/https://doi.org/10.1080/13632434.2021.1926963>

Sahlberg, P., & Cobbold, T. (2025). *What fully funded public schools could do*. *Medical Journal of Australia*, 223:S9.

Sahlberg, P., & Hargreaves, A. (2015). The tower of PISA is badly leaning. An argument for why it should be saved. *The Washington Post*.

<https://www.washingtonpost.com/news/answer-sheet/wp/2015/03/24/the-tower-of-pisa-is-badly-leaning-an-argument-for-why-it-should-be-saved/>

Sahlberg, P., & Savage, G. (2025, May 24). *The next three steps to help public schools*. The Saturday Paper.

<https://www.thesaturdaypaper.com.au/comment/topic/2025/05/24/the-next-three-steps-help-public-schools>

Sahlberg, P., Ojinnaka-Psillakis, A., & Goldfeld, S. R. (2025). Addressing the unnatural divide: why health and education are the necessary foundations of equitable child outcomes. *Medical Journal of Australia*, 223, S3-S5.

<https://doi.org/10.5694/mja2.70072>.

Savage, G. & O'Connor, K. (2014). National agendas in global times: curriculum reforms in Australia and the USA since the 1980s. *Journal of Education Policy*, 30(5), 609-630.

<https://doi.org/10.1080/02680939.2014.969321>

- Savage, G. (2017). Neoliberalism, education and curriculum. *In Powers of Curriculum: Sociological Perspectives on Education* (pp. 143-165). Oxford University Press Australia and New Zealand.
- Savage, G. C. (2013). Tailored equities in the education market: flexible policies and practices. *Discourse: Studies in the Cultural Politics of Education*, 34(2), 185-201. <https://doi.org/10.1080/01596306.2013.770246>.
- Savage, M. (2021). *The Return of Inequality*. Harvard University Press.
- Scanlan, M., & López, F. (2012). ¡Vamos! How School Leaders Promote Equity and Excellence for Bilingual Students. *Educational Administration Quarterly*, 48(4), 583-625. <https://doi.org/10.1177/0013161X11436270>.
- Scheerens, J., & Bosker, R. (1997). *The foundations of educational effectiveness*. Pergamon.
- Schleicher, A. (2014). Equity, excellence and inclusiveness in education: policy lessons from around the world, international summit on the teaching profession. *OECD Publishing, Paris*. <https://doi.org/10.1787/9789264214033-en>
- Scottish Government. (2024). *Education – achieving excellence and equity: national improvement framework 2025*. <https://www.gov.scot/publications/achieving-excellence-equity-2025-national-improvement-framework/>
- Scottish Government (Hayward, L.). (2023). *It's Our Future - Independent Review of Qualifications and Assessment: report*. <https://www.gov.scot/publications/future-report-independent-review-qualifications-assessment/>
- Scottish Government. (2019, June 25). *Empowering schools: education reform progress update*. <https://www.gov.scot/publications/empowering-schools-education-reform-progress-update/>.

- Scottish Government. (2021). *Closing the poverty-related attainment gap: progress report 2016 to 2021*. <https://www.gov.scot/publications/closing-poverty-related-attainment-gap-report-progress-2016-2021/>
- Scottish Government. (2022). Scottish Attainment Challenge - 2022 to 2023 – 2025 to 2026: fairer Scotland duty assessment. <https://www.gov.scot/publications/fairer-scotland-duty-assessment-scottish-attainment-challenge-2022-2023-2025-2026/>
- Scottish Government. (2023). *International council of education advisers: third report 2021-2023*. <https://www.gov.scot/publications/international-council-education-advisers-third-formal-report-2021-2023/pages/10/>
- Scottish Government. (2023). *Measuring the attainment gap*. <https://www.gov.scot/publications/education-national-improvement-framework-improvement-plan-2024/pages/7/>
- Scottish Government. (2024). *2025 National Improvement Framework*.
- Scottish Government. (2025). *Child poverty in Scotland falls*. [https://www.gov.scot/news/child-poverty-in-scotland-falls/#:~:text=The%20latest%20statistics%20show%20that,Wales%20and%2024%25%20NI\).](https://www.gov.scot/news/child-poverty-in-scotland-falls/#:~:text=The%20latest%20statistics%20show%20that,Wales%20and%2024%25%20NI).)
- Seith, E. (2025, August 18). *10 years of the Scottish Attainment Challenge: Has it been a success? Tes Magazine*. <https://www.tes.com/magazine/analysis/general/scottish-attainment-challenge-10-years>.
- Seitzer, H. (2023). More than meets the eye: uncovering the evolution of the OECD's institutional priorities in education. *Journal of Education Policy*, 38(2), 277-301. <https://doi.org/10.1080/02680939.2021.1974099>

- Sellar, S., & Lingard, B. (2013). PISA and the expanding role of the OECD in global educational governance. In *PISA, power, and policy: The emergence of global educational governance*, 185-206. Symposium Books.
- Sellar, S., & Lingard, B. (2014a). Equity in Australian schooling: The absent presence of socioeconomic context. In *S. Gannon & W. Sawyer (Eds.), Contemporary issues of equity in education* (pp. 1-21). Cambridge Scholars Publishing.
- Sellar, S., & Lingard, B. (2014b). The OECD and the expansion of PISA: New global modes of governance in education. *British Educational Research Journal*, 40(6), 917-936.
<http://www.jstor.org/stable/43297629>
- Selwyn, N. (2013). Researching the once-powerful in education: The value of retrospective elite interviewing in education policy research. *Journal of Education Policy*, 28(3), 339-352. <https://doi.org/10.1080/02680939.2012.728630>
- Sen, A. (1992). *Inequality Reexamined*. Cambridge, MA: Harvard University Press.
- Sen, A. (1999). *Development as freedom*. New York: Knopf.
- Senior, C. (2021) *Educational equity in Australia and Canada: A comparative analysis of two jurisdictions*. Master's thesis, University of New South Wales, Sydney.
- Senior, C. (2026). *Policymakers' conceptions of equity in education in Scotland and South Australia*. Manuscript submitted for publication.
- Senior, C., & Sahlberg, P. (2025). The evolution of the OECD's position on equity in global education. *International Journal of Educational Development*, 114, 103241.
<https://doi.org/10.1016/j.ijedudev.2025.103241>.
- Shields, C. M. (2010). Transformative leadership: working for equity in diverse contexts. *Educational administration quarterly*, 46(4), 558-589.
<https://doi.org/10.1177/0013161X10375609>.

- Siirilä, J., & Salonen, A. O. (2024). Towards a sustainable future in the age of polycrisis [Perspective]. *Frontiers in Sustainability*, 5.
<https://doi.org/10.3389/frsus.2024.1436740>
- Sinclair, M. P., & Brooks, J. S. (2024). School funding and equity in Australia: Critical moments in the context of text production phase of the education policy cycle. *Educational Policy*, 38(7), 1751-1779.
<https://doi.org/10.1177/08959048241268250>.
- Singh, P., Thomas, S., & Harris, J. (2013). Recontextualising policy discourses: A Bernsteinian perspective on policy interpretation, translation, enactment. *Journal of Education Policy*, 28(4), 465. <https://doi.org/10.1080/02680939.2013.770554>.
- Sjøberg, S. (2020). The PISA-syndrome-How the OECD has hijacked the way we perceive pupils, schools and education. *Confero: Essays on Education, Philosophy and Politics*, 7(1), 34-88. <https://doi.org/10.3384/confero.2001-4562.190125>
- Sosu, E., & Ellis, S. (2014). Closing the attainment gap in scottish education. York: Joseph Rowntree Foundation.
- Sosu, E., & Ellis, S. (2014). *Closing the Attainment Gap in Scottish Education*. York: Joseph Rowntree Foundation.
- Spillane, J. P., Reiser, B. J., & Reimer, T. (2002). *Policy implementation and cognition: reframing and refocusing implementation research*. Review of Educational Research, 72(3), 387–431. <https://doi.org/10.3102/00346543072003387>.
- Sriprakash, A. (2023). Reparations: Theorising just futures of education. *Discourse: Studies in the Cultural Politics of Education*, 44(5), 782-795.
<https://doi.org/10.1080/01596306.2022.2144141>
- Stake, R.E. (1995). *The Art of Case Study*. Thousand Oaks, CA: Sage.
- Steil, B. (2018). *The Marshall Plan: Dawn of the Cold War*. Oxford University Press.

- Steiner-Khamsi, G. (2025). Time in education policy transfer: The seven temporalities of global school reform. Columbia University, Teachers College. Palgrave Macmillan.
- Stewart-Withers, R., Banks, G., McGregor, A., & Meo-Sewabu, L. (2014). Qualitative research. In R. Scheyvens (Ed.) *Qualitative research* (pp. 59-80). SAGE Publications, Ltd, <https://doi.org/10.4135/9781473921801.n4>
- Takayama, K. (2015). *Has PISA Helped or Hindered? Reflections on the ongoing PISA debate*. https://headfoundation.org/wp-content/uploads/2020/11/thf-papers_Has-PISA-helped-or-hindered_Reflections-on-the-ongoing-PISA-debate.pdf
- Teemant, A., Borgioli Yoder, G., Sherman, B. J., & Santamaría Graff, C. (2021). An equity framework for family, community, and school partnerships. *Theory Into Practice*, 60(1), 28–38. <https://doi.org/10.1080/00405841.2020.1827905>
- The University of Melbourne. (n.d.). *Incorporating your published work in your thesis*. <https://gradresearch.unimelb.edu.au/preparing-my-thesis/thesis-with-publication#examples-of-theses-with-publications>
- Theoharis, G. (2024). *The school leaders our children deserve: Seven keys to equity, social justice, and school reform*. Teachers College Press.
- Thompson, G., & Hogan, A. (2025). The Desire for Markets: Privatization, Commercialization, Philanthropy, and the Publicness of Schooling. *The BERA-Sage Handbook of Research-Informed Education Practice and Policy*, 1, 407-424. SAGE Publications.
- Thompson, G., Sellar, S., & Buchanan, I. (2022). 1996: the OECD Policy-Making Assemblage. *Journal of Education Policy*, 37(5), 685-704. <https://doi.org/10.1080/02680939.2021.1912397>
- Tippett, N., Baak, M., Johnson, B., & Sullivan, A. (2024). What is ‘fair’ and ‘just’ in refugee education? How teachers and school leaders negotiate competing discourses of

- ‘equity’ and ‘equality’ in Australia. *International Journal of Inclusive Education*, 28(14), 3454–3469. <https://doi.org/10.1080/13603116.2023.2208116>.
- Torres, R. (2021). *Does test-based school accountability have an impact on student achievement and equity in education? A panel approach using PISA* (OECD Education Working Paper No. 250). OECD Publishing. <https://doi.org/10.1787/0798600f-en>
- Turoff, M. (2002). The Policy Delphi. *Technological Forecasting*.
- UNESCO Constitution. (1945). Constitution of the United Nations Educational, Scientific and Cultural Organization. <https://www.unesco.org/en/legal-affairs/constitution>
- UNESCO Institute for Statistics. (2018). *Handbook on Measuring Equity in Education*. Unesco Institute for Statistics.
- UNESCO Institute for Statistics. (2020). UIS Releases More Timely Country-Level Data for SDG 4 on Education. <https://uis.unesco.org/en/news/uis-releases-more-timely-country-level-data-sdg-4-education>
- UNESCO. (2021). *Reimagining our futures together: A new social contract for education*. <https://doi.org/10.54675/ASRB4722>
- UNESCO. (2024). Global Education Monitoring Report 2024/5: Leadership in education – Lead for learning. Paris, UNESCO.
- UNESCO. (n.d.) Accessed 27 February 2026. *Laboratory of ideas*. <https://www.unesco.org/en/laboratory-ideas>.
- Vamos, S., & Zhou, M. (2009). Using focus group research to assess health education needs of pre-service and in-service teachers. *American Journal of Health Education*, 40(4), 196-206.

- Van Damme, D. (2022). *Curriculum Redesign for Equity and Social Justice*. Center for Curriculum Redesign. <https://curriculumredesign.org/wp-content/uploads/Curriculum-Redesign-for-Equity-and-Social-Justice-CCR.pdf>.
- van Eck Duymaer van Twist, A. & Newcombe, S. (2021). *Strauss-Howe generational theory*. In James Crossley and Alastair Lockhart (eds.) *Critical Dictionary of Apocalyptic and Millenarian Movements*. Retrieved from www.cdamm.org/articles/strauss-howe.
- Van Heertum, R., & Torres, C. A. (2011). Educational reform in the US in the past 30 years: great expectations and the fading American dream. In *In the Shadow of Neoliberalism: Thirty Years of Educational Reform in North America* (pp. 3-27). Bentham Science Publishers.
- Varsik, S. (2022). A snapshot of equity and inclusion in OECD education systems: findings from the strength through diversity policy survey. *OECD Education Working Papers*, No. 284, OECD Publishing, Paris. <https://doi.org/10.1787/801dd29b-en>
- Vaughan, J., Anderson, J. & McClenaghan, P. Time Persistent Trust: What is it and why is it important to school change leadership?. *Australian Educational Researcher*. 53, 11 (2026). <https://doi.org/10.1007/s13384-025-00932-3>.
- Verger, A., Quilabert, E., Moschetti, M.C. (2023). Multi-scalar Interactions and Educational Reform: The Trajectory of School Policy in Catalonia Within the Spanish State. In: Krejsler, J.B., Moos, L. (eds) *School Policy Reform in Europe*. Educational Governance Research, vol 22. Springer, Cham. https://doi.org/10.1007/978-3-031-35434-2_8
- Viennet, R., & Pont, B. (2017). *Education policy implementation: A literature review and proposed framework*. OECD Education Working Papers, No. 162, OECD Publishing, Paris. <https://doi.org/10.1787/fc467a64-en>

- Volckmar, N. (2018). The Enduring Quest for Equity in Education: Comparing Norway and Australia. *Scandinavian Journal of Educational Research*, 63(4), 617–631.
<https://doi.org/10.1080/00313831.2017.1415967>.
- Ward, S. C., Bagley, C., Lumby, J., Woods, P., Hamilton, T., & Roberts, A. (2015). School leadership for equity: lessons from the literature. *International Journal of Inclusive Education*, 19(4), 333–346. <https://doi.org/10.1080/13603116.2014.930520>.
- West, M. R., & Peterson, P. E. (2007). *School money trials: the legal pursuit of educational adequacy*. Rowman & Littlefield.
- Wilkinson, R. G., & Pickett, K. (2011). *The spirit level: why greater equality makes societies stronger*. Bloomsbury Publishing.
- Wilkinson, R., & Pickett, K. (2018). *The inner level: how more equal societies reduce stress, restore sanity and improve everyone's well-being*. London: Allen Lane.
- Wilson, C. D., & Fergus, E. O. (1988). Combining Effective Schools And School Improvement Research Traditions for Achieving Equity-Based Education. *Equity & Excellence in Education*, 24(1), 54–65. <https://doi.org/10.1080/1066568880240108>.
- Wilson, V. (1997). Focus groups: a useful qualitative method for educational research?. *British Educational Research Journal*, 23(2), 209-224.
<https://doi.org/10.1080/0141192970230207>
- Wiseman, A. W., Anderson, E. W., Damaschke-Deitrick, L., Galegher, E., Dzotsenidze, N., & Park, M. (2025). Navigating the terrain of comparative education: An introduction. In *Handbook on Comparative Education* (pp. 1-11). Edward Elgar Publishing. <https://doi.org/10.4337/9781803927831.00009>.
- World Bank. (2018). *World development report learning to realize education's promise*.
<https://www.worldbank.org/en/publication/wdr2018>

- Xiaomin, L., & Auld, E. (2020). A historical perspective on the OECD's 'humanitarian turn': PISA for Development and the Learning Framework 2030. *Comparative Education*, 56(4), 503-521. <https://doi.org/10.1080/03050068.2020.1781397>
- Yanow, D., & Schwartz-Shea, P. (2015). *Interpretation and method: empirical research methods and the interpretive turn*. Routledge.
- Ydesen, C., & Bomholt, A. (2020). Accountability implications of the OECD's economistic approach to education: A historical case analysis. *Journal of Educational Change*, 21(1), 37-57. <https://doi.org/10.1007/s10833-019-09355-1>
- Yliniva, K., Bryan, A., & Brunila, K. (2024). 'The future we want'? – the ideal twenty-first century learner and education's neuro-affective turn. *Comparative Education*, 1-21. <https://doi.org/10.1080/03050068.2024.2363096>
- Yoon, E.-S. (2024). From GERM (Global Educational Reform Movement) to NERM (Neoliberal Educational Reform Madness). *Critical Education*, 15(2), 13-28. <https://doi.org/10.14288/ce.v15i2.186904>
- Zhao, Y. (2017). What works may hurt: Side effects in education. *Journal of Educational Change*, 18(1), 1-19. <https://doi.org/10.1007/s10833-016-9294-4>
- Zhao, Y. (2020). Two decades of havoc: A synthesis of criticism against PISA. *Journal of Educational Change*, 21(2), 245-266. <https://doi.org/10.1007/s10833-019-09367-x>
- Zhou, S., Gao, X., Wellstead, A. M., & Kim, D. M. (2023). Operationalizing social equity in public policy design: A comparative analysis of solar equity policies in the United States. *Policy Studies Journal*, 51(4), 741-772. <https://doi.org/10.1111/psj.12505>

Appendix

Appendix A

Polycymaker Questionnaire

1. What is your current role in your education system and what are the key responsibilities you have in that role?
2. How long have you been in your current role?
3. What other roles have you had in education prior to your current role?
4. How long have you been working in education?
5. Around the world, many education systems have dual policy priorities related to equity and excellence. How would you describe the prioritisation of equity and excellence currently in your education system?
 - equity is prioritised more than excellence
 - excellence is prioritised more than equity
 - equity and excellence are equally prioritised
 - neither equity nor excellence are prioritised
6. Do you feel you have a clear understanding of what equity in education means?
 - no
 - somewhat
 - yes
7. Please skip this question if you answered 'yes' to question 6.

If you answered 'no' or 'somewhat' to the previous question, what are you unclear about regarding what equity in education means?
8. Please skip this question if you answered 'no' to question 6.

If you answered 'somewhat' or 'yes' to the previous question, how would you describe the meaning of equity in education?
9. Increasingly, many reports and papers are focusing on equity in education. What has been influential (if anything) in shaping your understanding of equity in education (e.g. any specific research, policies, reports, etc.)?
10. Do you think your understanding of equity in education is reflected in how equity is understood generally in your education system? Could you please provide a specific current policy example that supports your answer.

11. What would you say are the main current policies in your education system that aim to improve equity in education?

12. If you think about your own education system currently, how equitable do you think it is?

- equitable
- somewhat equitable
- not equitable

13. Please select your level of agreement with the following statement:

Your education system has become more equitable over the past five years.

- Agree
- Somewhat agree
- Disagree

14. Please explain your reasoning for your response to question 13 (including any specific outcomes/data/indicators you considered).

15. How confident are you about being able to effectively contribute to policy discussions and development that would improve equity in education in your system?

- Confident
- Somewhat confident
- Not confident

16. The next question is in relation to the scenario below.

Scenario

A new major report commissioned by your government has just released its findings. The report has found that achievement gaps in education outcomes in your system continue to be strongly linked to a child's postcode. The report has also found that achievement gaps in education outcomes between more socioeconomically advantaged and disadvantaged children have increased over the past two decades. What's more, forecasting included in the report predicts that the way things are going, your overall education system performance is likely to get worse over the next decade, not better.

The new education minister has set-up a meeting with you for tomorrow regarding the latest report and its findings.

"Ok," says the education minister. "Now, what do you think we should do to best address and respond to the findings?"

What is your response to the education minister?

17. How long did it take for you to complete this questionnaire?

Appendix B

Polymaker workshop plan

1.5 hours

Run Sheet

*have powerpoint/printed out paper of some of the themes from the questionnaire

Time (mins.)	Focus	Questions
5	Welcome Thank everyone for being there, explain project, explain audio recording again, explain workshop plan.	Ask if they have any questions before getting started.
15	Questionnaire Provide overview of some results from questionnaire as starting off point for discussion. Show slides.	- Discuss ideas about what equity in education currently means at the education system level. - how would you describe the meaning of equity in education? - How would you know - Discuss ideas about how equitable the education system is currently. (give them the opportunity to say anything/comment on questionnaire results, why think there are diverse meanings if there are etc.)
32	What is currently happening regarding equity in education, policy impact	- What are the main current policies that aim to improve equity in education at the system level? (bring up responses from questionnaire to initiate) - What current system level practices support enhancing equity in education at the system level? (this may or may not come through from questionnaire from the scenario so could bring up responses from that) - What is working and what is not working regarding system level policy to improve equity in education? - What is working and what is not working regarding system level practice to improve equity in education? - How do you know – working versus not working – what outcomes/data/indicators are you looking at?
7 mins	Bridge to Future	One little activity to switch their mode of thinking here, take 5 mins to write or draw some ideal future of their

	Have this on a slide.	education system if it was keeping the promise of the policies focusing on both equity and excellence. – anyone want to share?
30	How can equity in education be improved? What do we need to focus on? Future plans for what will be happening regarding equity in education, policy plans	now when we think about the future what are you thinking about, what are we thinking about, what is the future for you. How far in advance are you looking. Why did you think that way. Let's talk about the future and now assume that the future in this exercise is 10 years from now. • What will equity in education mean in the future in your education system? How similar or different to current? If same or different, why or why not? • Thinking about current plans, How will equity in education aim to be improved in future education policies and practices in your system? • Do you think those future plans to improve equity in education will have a greater impact than current plans – why/why not? • When you think about system level policy and practice, what do you think would need to happen to enhance equity in education in your system? • How would you know if equity was improving or not in your education system in the future? What do you think are the outcomes that should be used to measure equity - what are the outcomes in the future that we need to be looking at? • How would these ideas about equity in education in the future of your system relate to future ideas about excellence? Anything else you think is important to say about this that we haven't discussed?

Appendix C

School leader focus group run sheet

1.5 hours

Time (mins)	Focus	Questions
5	Welcome Thank everyone for being there, explain project, explain audio recording again, explain plan.	Ask if they have any questions before getting started. activity...take some time and write down what equity in education means for you. Definition or bullet points, short description, whatever comes to mind, what do you think personally in your school or in schools in your system. Ok to share?
10	Meaning of equity in education	- Based on previous, ask why they think it means that? Discuss - ask if it is the same when looking at system level policies? If we take a systems view/definition, would your answers still be the same/similar/ - or does it change is it a different thing – have a little chat about that – then transition to policies/practice?
15	Policy to practice	- What are the major system level policies aimed at improving equity in your education system? - How are those system level equity-related education policies practiced in schools? - What are major school level policies (most significant ones) aimed at improving equity in your school? - How are school level equity-related policies put into practice in schools?
30	Equity in education and school leadership	- What do you think the role of the school leader is in implementing these broader system level equity-related objectives? - How is the equity related focus in your education system affecting school leadership?
30	The future Same segway question with policymakers – give	Do you think the meaning of equity in education should change in the future?

	you 6 mins – same to policymaker ones. Ideal equitable and excellent schools in Scotland in the future – 10 years from now	• What do you think would need to happen or where do you think policy and practice would need to go or change to enhance equity in education in your school in the future? Anything particularly regarding school leadership? • How could schools sustain equity efforts despite potential future changes to (lack of increased) funding and political leadership in the future? • How do you think we should measure equity in the future? What are some of the things we should be looking at? • Is improving equity more the responsibility of the policy/system in general or is it something that schools should be held accountable for, what other policies or things should your system consider...(people might say poverty, health, employment for example), what would it take? How should the government work to do this? • Do you think these future plans to improve equity in education will have a greater impact than current plans – why/why not?
--	--	--