A curriculum for equity? Changing notions of equity in educational policy and Scotland's Curriculum for Excellence

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Abstract

Within the social sciences, the term equity has a helpful and precise meaning - referring to a differentiated response to an individual's own distinct needs or circumstances. However, since the 2000s 'equity' has been recontextualised within national and international education policymaking as a generic term. This recontextualisation has led to 'equity' being used uncritically to refer to a range of related, and often contradictory, concepts. The focus on 'equity' is also a notable feature of current Scottish education policy. This thesis explores the implications of a wider focus on 'equity' for Scotland's Curriculum for Excellence (CfE) policy. It takes a mixed methods approach: firstly, by using Corpus Linguistics to analyse the use of the term 'equity' in CfE policy texts since 2004, and, secondly, by interviewing policymakers with responsibility for authoring those policies. This innovative approach allows a detailed consideration of what interpretations of 'equity' have been advanced within CfE policy, and how these have changed over time. My analysis shows that, influenced largely by a change in political leadership, explicit consideration of 'equity' within CfE policy has increased since 2014-15. However, recent changes to the technical form of CfE policy, driven by ongoing cultures of performativity, may have narrowed the scope for the kind of adaptive teacher professionalism which is most likely to support the realisation of equity. Based on this analysis, I emphasise the value of the concept of equity in informing both curriculum policy and practice in Scotland. However, I urge caution in the uncritical use of 'equity' within education policy. I argue that there is a need for the education policy community in Scotland to develop a more nuanced view of what the term means for the curriculum - as well as the ways in which wider education policy may help or hinder its realisation.

Declaration

I declare that I have composed this thesis myself and that it embodies the results of my own research. Where appropriate, I have acknowledged the nature and extent of work carried out in collaboration with others included in the thesis.

Stephen Edgar

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Chapter 1 - Introduction

1.1 The 'Scottish myth' of educational equality

> *"Scottish education is characterised by a peculiar awareness of its own history"* (Anderson, 2013, p. 241).

The idea that the Scottish education system is equitable has influenced how Scots think about themselves and their country (Barr, 2008). It has been an important theme in writing about Scottish education, and about Scotland, for over a hundred years. McPherson and Raab (1988, p. 405) have called it the central 'myth' of Scottish education:

> *"[…] the 'Scottish myth'* [is] *a traditional and popular view that has been taken of the egalitarian nature of Scottish society and of its realisation through the school system".*

The 'Scottish myth' is historically grounded in the establishment of parish schools in the early modern period, which were heavily influenced by the Presbyterian reformer John Knox (Anderson, 1995; McPherson & Raab, 1988). Knox's vision was to establish a school in each parish to teach all children to read the Bible for themselves, and to provide religious education (Anderson, 1995). The parish schools also equipped a small number of (male) children with the knowledge, for instance of Latin, which would enable them to progress to university and then enter professions such as the law or religious ministry (Anderson, 1995; 2013; McPherson & Raab, 1988). Although the parish schools enabled Scotland to achieve widespread literacy earlier than many other comparable countries, they also largely served to reproduce existing inequalities (Anderson 1995; 2013). For instance, those who followed the route from parish school to university were male and tended to come from local elites. There were also wide geographical variations in the eventual provision of the parish schools (Anderson, 1995).

Despite the mixed historical evidence that the Scottish education system was a truly equitable one, the 'myth' of educational equality emerged in the late 19th century, at around the same time as the establishment of Scotland's state-run schooling system (McPherson & Raab, 1988). Although state-run schools did address gaps in the provision of parish schools, including in the large, industrialised cities, the system was highly selective, with access to secondary education only possible for those children who passed a competitive qualifying examination at age 12 (Anderson, 2013). As a result, the new

system of state schooling, like the previous parish model, reflected existing inequalities (McPherson & Raab, 1988). McPherson and Raab (1988, p. 409) have suggested that an important function of the emergence of the Scottish 'myth' at around this time was "a reconstruction of the past for present purposes". In other words, policymakers used the 'Scottish myth' as a means of justifying, and perhaps obscuring, the unequal outcomes generated by a highly selective, competitive schooling system.

Over time, supporters of both continuity and change in education policy used the 'Scottish myth' to underpin their arguments (McPherson & Raab, 1988). However, the 'myth' also had real effects on social practices within education - both positive and negative (Anderson, 1995). For instance, it privileged the model of the local parish school in a small town, which was also the career path by which many individuals rose to senior positions in Scottish education in the early to mid-20th century (McPherson & Raab, 1988). These individuals then drew on their own experiences, and their understandings of Scotland, to emphasise the ongoing relevance of the 'myth' in explaining the Scottish education system. "Thus life came to imitate literature, and literature, life" (McPherson & Raab, 1988, p. 408).

1.2 'Equity' as a current education policy priority

These introductory paragraphs indicate that ideas about equality appear to be a longstanding and important cultural dimension of Scottish educational policymaking. This thesis focuses on a much more recent period - the first two decades of the 21st century. Initially, this period feels remote from the historical development of the Scottish education system, or cultural ideas about equality first set out in the 19th century. However, the 'Scottish myth' of educational equality is highly relevant to the overall theme of this thesis - as Scottish education policy continues to emphasise ideas about equality. In fact, this has been a very strong element of Scottish education policy since the mid-2010s. The language used to describe these ideas is now different - as the Scottish Government has established the term 'equity' (along with excellence) as one of its twin education policy goals (Scottish Government, 2016). The Scottish Government (2016, p. 3) has defined 'equity' as follows.

> *"Ensuring every child has the same opportunity to succeed, with a particular focus on closing the poverty-related attainment gap".*

In other words, the 'equity' policy goal aims to increase the educational attainment of children and young people living in the poorest areas of the country so that, over time, there is no longer a correlation between socio-economic status and attainment. In support of this policy goal, in 2015 the Scottish Government announced a new initiative that was specifically focused on addressing educational inequalities. The Scottish Attainment Challenge, a programme of targeted funding, aimed to improve attainment in literacy and numeracy, and promote health and wellbeing, for primary school pupils living in the most deprived areas (Scottish Government, 2021a). Although children living in poverty can, and do, achieve well at school, the Scottish Attainment Challenge recognised that Scottish data have long shown a correlation between socio-economic status and educational outcomes, such as attainment (Croxford, 2015; OECD, 2007; OECD, 2015; Sime, 2013; Sosu & Ellis, 2014).

These links between socio-economic status and educational outcomes reflect high levels of poverty and inequality within Scottish society. As one of the first countries in the world to industrialise, with the experiences of urbanisation and immigration that this brought, Scotland experienced early on the emergence of inequalities linked to social class and poverty (McPherson & Raab, 1988). Today, Scotland still experiences significant challenges linked to the distribution of financial resources, wealth, and power. For instance, although the percentage of individuals living in absolute poverty[1] has fallen since the 1990s, in 2017-20 19% of the population, or 1.03 million people, were living in relative poverty[2] (Scottish Government, 2021d). In addition, in the same period 61% of working-age adults in relative poverty were living in working households (Scottish Government, 2021d). Poverty also affects a large proportion of children in Scotland. Again, although it has fallen from the levels seen in the 1990s, in 2017-20 24% of children in Scotland were living in relative poverty (Scottish Government, 2021d). There is strong research evidence of a correlation between high levels of income inequality within a society and a range of negative social outcomes (Wilkinson & Pickett, 2010). Data from 2017-20 indicate that income inequality was decreasing in Scotland (Scottish Government, 2021d). However, the top 10% of the population had 21% more income

[1] Defined by the Scottish Government (2021d) as: "individuals living in households whose equivalised income is below 60 percent of inflation-adjusted median income in 2010/11. This is a measure of whether those in the lowest income households are seeing their incomes rise in real terms".
[2] Defined by the Scottish Government (2021d) as: "individuals living in households whose equivalised income is below 60 percent of median income in the same year. This is a measure of whether those in the lowest income households are keeping pace with the growth of incomes in the economy as a whole".

(before housing costs) in 2017-20 than the bottom 40% combined (Scottish Government, 2021d).

Emerging evidence indicates that the COVID-19 pandemic is likely to have magnified existing inequalities within Scotland. National statistical data about wealth and income, of the kind outlined in the previous paragraphs, are not yet available for the pandemic period. However, there is already clear evidence that those living in poverty were more likely to die of COVID-19 (Cebula et al., 2021), and that the pandemic has had a sometimes "catastrophic" impact on parents and families who were just coping or already struggling to cope beforehand (Public Health Scotland, 2021). There is also emerging evidence of the ways in which the pandemic has had a negative impact on children and young people's mental health, physical wellbeing, sense of connectedness, and relationships - with the most severe impacts again correlated to existing socio-economic inequalities (Public Health Scotland, 2021).

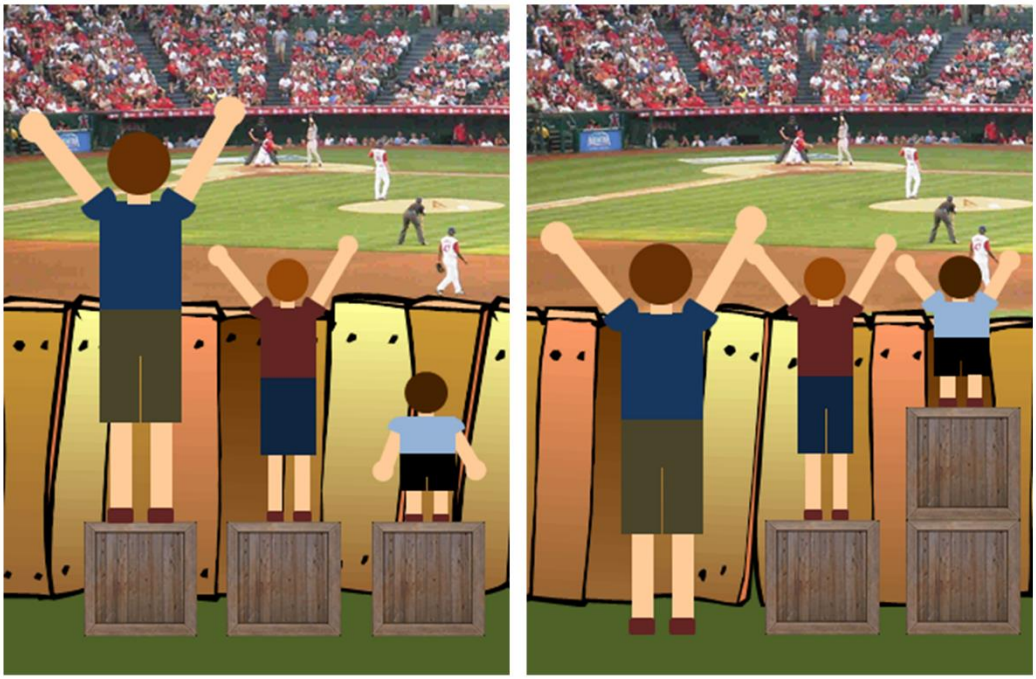
The data presented in the preceding paragraphs illustrate the serious challenges Scotland faces in addressing the impact of poverty. In the interests of making my own viewpoint explicit, I welcome the strong focus on addressing the social determinants of educational outcomes within national education policy, including through the Scottish Attainment Challenge. However, in this thesis I also take a more critical stance on the 'equity' policy goal. While welcoming its overall intent, I select as my broad theme a desire to understand what the term 'equity' means within the context of Scottish education policy. This is important, as the meaning of 'equity' - an abstract noun now embedded within Scottish education policy - is not as straightforward as the above definition provided by the Scottish Government may suggest. I move on to consider some of the complexities of defining this 'tricky concept' in the next section.

1.3 The tricky concept of 'equity'

In this thesis, I will show that the term 'equity' has multiple definitions, especially when it is used within education policy. In this introductory chapter, before exploring the concept more fully within the literature, I wish to begin to highlight some of the challenges with defining 'equity'. I take as my starting point an image. Through my own professional role within the Scottish education system, which I describe in section 1.6, I

was aware of this image before starting my doctoral study. Figure 1 below reproduces the original version of the image.

Figure 1: A visual depiction of 'equity'?



Source: Froehle (2016)

Figure 1 shows two versions of a baseball game. In both versions, three boys of different heights are watching the game from behind a fence. However, in the version on the left, the three boys are each standing on crates of equal sizes - meaning that only two of them can see the game. In the version on the right, the three crates have been re-allocated so that all three boys can see the game. The tallest boy does not need a crate at all, as he can see the game without needing one. The second tallest boy, as on the left, is standing on one crate, and can still see the game. The smallest boy, who before could see nothing, is standing on two crates and can now see the game. One reading of the image is that the right-hand version exemplifies 'equity' by showing the unequal distribution of resources (the crates) to produce more equal outcomes (being able to see the game).

Where did the image come from? As might be expected from the depiction of a baseball game, it did not originate in Scotland. In fact, the image was developed in 2012, in the

United States, by Craig Froehle, a Business Studies Professor (Froehle, 2016). In a blog post, Professor Froehle (2016) describes how he first developed it.

> *"Back in 2012, shortly after the US elections, I had crafted up a graphic to illustrate my point in an argument I was having with a conservative activist. I was trying to clarify why, to me (and, I generalized, to liberals), "equal opportunity" alone wasn't a satisfactory goal and that we should somehow take into consideration equality of outcomes. I thought the easiest example of this concept is kids of different heights trying to see over a fence. So, I grabbed a public photo of Cincinnati's Great American Ball Park, a stock photo of a crate, clip art of a fence, and then spent a half-hour or so in PowerPoint concocting an image that I then posted on Google+".*

The image is a good example of a meme - an image or piece of text that is often shared and distributed widely online. During the process of sharing, memes can be adapted by their users. Professor Froehle's (2016) blog post highlights that this is exactly what happened to the image from Figure 1.

> *"But, unbeknownst to me, as the Internet is so wonderfully amazing at doing, my original graphic was being adapted, modified, and repurposed in a mind-blowing variety of ways, and then shared and redistributed all over the place. […] There are literally hundreds (perhaps thousands) of different adaptations, most with wording changes, but some that actually manipulated the original image as well to convey a slightly different idea".*

Professor Froehle (2016) goes on to describe how some people added text to the image, to make their points more explicit. For instance, in early iterations of the image, the left-hand version was labelled with 'equality' or 'equal', while the right-hand version was labelled with 'fairness' or 'justice'. By 2013, another set of changes had taken place, with the term 'equity' now being used to describe the right-hand version. This appears to be the version that I became aware of in Scotland. From Professor Froehle's long discussion of the subsequent changes to his image, which spanned several years, the following points are especially noteworthy.

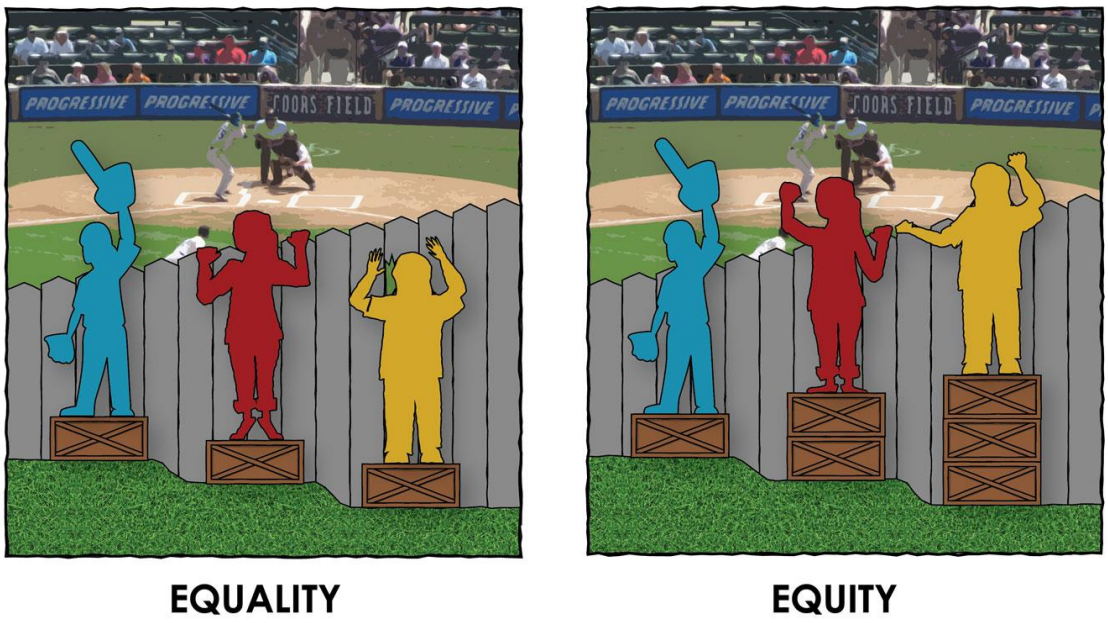
- One version changed the number of crates the children are standing on - with the right-hand version of the image containing more boxes than the left-hand version. Professor Froehle explains that he was opposed to this change - as he saw it as making the right-hand image "inherently more resource-intensive" than the left.

- More versions removed the fence the children were looking over - referring to its absence as "liberation" or the dismantling of "systemic barriers".

- Another version replaced two of the boys with girls. Yet another version gave all the boxes to a girl - ostensibly illustrating the difference between equality, equity, and feminism.

An interesting alteration of the 'equity' image was developed by Kuttner (2016), who suggested that the original image reflected deficit thinking because it located the source of inequity in people's height - an intrinsic characteristic that they cannot change. He also suggested yet more changes to the graphic to show some people standing on lower ground to begin with, as a metaphor for longstanding, historical inequality. Figure 2 below reproduces Kuttner's re-interpretation of the original image.

Figure 2: Another visual depiction of 'equity'?



Source: Kuttner (2016)

My purpose in discussing the genesis and further development of Professor Froehle's internet image, as shown in Figures 1 and 2, is to begin to illustrate some of the complexities involved in defining 'equity'. Changes to such an apparently simple image can reveal important questions related to understandings of 'equity' - for instance:

- How does 'equity' differ from 'equality'? Professor Froehle originally intended the right-hand image to represent "equality of outcome", however some later versions used the same image but labelled it 'equity'. Therefore, if the same image

can represent both equality and 'equity', how much conceptual and practical overlap is there between these different terms?

- Does 'equity' aim to respond to inherent characteristics (such as height) or to those which are the result of social or economic inequality?

- Does realising 'equity' involve addressing deep-rooted social or economic inequality?

- Is 'equity' inherently more resource-intensive to realise than equality?

These questions highlight that 'equity' is not a straightforward concept. Therefore, I find its current prominence within Scottish education policy to be particularly interesting. What are policymakers trying to achieve by using 'equity' within policy texts? Is it a contemporary interpretation of McPherson and Raab's (1988) 'Scottish myth' of educational equality? I noted above that McPherson and Raab suggested that the 'myth' acted, in large part, as a means of obscuring real inequality. Reflecting this viewpoint, some authors have suggested that the Scottish Government may be using the term 'equity' as a rhetorical device. For instance, Arnott and Ozga (2016, p. 258) have claimed that the recent policy focus on closing poverty-related 'attainment gaps' is a rhetorical device which is strongly bound up with the Scottish Government's overall political goal of achieving Scottish independence:

> *"Through inward referencing, implicit characteristics of the education system and the nation are mobilised (especially those that promote Scottish education as fair, equitable and socially just) […]."*

Alternatively, does the policy commitment to 'equity' signal a substantive attempt to resolve a longstanding, "wicked problem" (Rittel & Webber, 1973) that has long characterised Scottish education? This is certainly the view of authors such as Chapman and Ainscow (2021), who, based on their close engagement with Scottish policymakers over the last few years, point to a high level of political commitment to current attempts to break the link between socio-economic status and educational outcomes. I hope that this thesis will enable me to offer some tentative answers to these questions. However, leaving them unresolved for now, I wish to move on to consider what the 'tricky concept' of 'equity' may mean for the curriculum in Scotland, and why this is important.

1.4 'Equity' and Scottish curriculum policy

If the 'tricky concept' of 'equity' makes up the broad theme of my thesis, the Scottish curriculum provides its focus. I aimed to explore what the wider focus on 'equity' meant for Scottish curriculum policy - Curriculum for Excellence. Curriculum for Excellence (known as CfE) is Scotland's current curriculum for children and young people aged from three to 18. It was introduced in 2010, following a process of review and development which began in 2004. CfE contained several distinctive elements, which had not previously been seen within Scottish curriculum policy (Priestley, 2018). These included: an emphasis on the learner; a reduction in the prescription of detailed curriculum content; and a focus on teacher curriculum making (Priestley, 2018).

I was keen to explore the links between the 'tricky concept' of 'equity' and CfE within this thesis because policymakers themselves have emphasised the connection. Recent national policy texts have drawn out the links between CfE and either the term 'equity' itself, or the policy goal of 'closing the poverty-related attainment gap' which, as I noted above, is the Government's preferred definition of 'equity'. The following extracts from recent policy texts illustrate these links.

> *"Moving forward, the two key priorities for CfE are: ensuring the best possible progression in literacy, numeracy and health and wellbeing for every child and young person; and closing the attainment gap".* (Education Scotland, 2016a)

> *"Scotland's Curriculum for Excellence continues to provide the basis for our relentless focus on excellence and equity".* (Scottish Government, 2019b)

> *"During the recovery phase, ELC* [Early Learning and Childcare], *primary and secondary teachers and practitioners should […] recognis*[e] *that children and young people from disadvantaged backgrounds may have faced multiple barriers to learning over the period of the school closures. Applying the principle of equity, consider how to provide additional and appropriate support where it is most needed in order to maximise engagement with learning and continue the work to close the poverty related attainment gap".* (Scottish Government, 2021c)

These implied links between CfE and 'equity' pose important questions about the extent to which the wider focus on 'equity' has influenced CfE policy. The current policy focus on 'equity' is evident from 2015 onwards, and therefore post-dates the initial development of CfE by more than a decade. When exploring CfE policy before this point, Sosu and Ellis (2014) suggested that it did not have a strong focus on the socio-economic determinants of educational outcomes. Therefore, I wished to consider whether there had

been any subsequent changes to CfE policy to take account of newer ideas about 'equity', and how substantive any such changes had been. I anticipated that, through the study, I would be able to identify some tangible features of an 'equitable' curriculum, and then be able to explore whether these were in fact evident within CfE policy. For instance, Sosu and Ellis (2014) suggested that, in Scotland, a curriculum policy which pays close attention to socio-economic status would have the following features.

- Applying a "poverty lens" to national policy - including high visibility of research-informed advice and examples of how the curriculum can be designed to meet the needs of children and young people living in poverty.

- Illustrating how the "flexibility" that CfE offered should be applied to help improve educational attainment for children and young people living in poverty.

- Providing nationally available, standardised tests which would provide data on how well CfE is meeting the needs of children and young people living in poverty.

The other alternative was that such curriculum features would not be visible within CfE post-2015, indicating that the links between CfE policy and 'equity' were more rhetorical than substantive - and that 'equity' was therefore a contemporary version of the 'Scottish myth' of educational equality.

I focused my exploration of these questions on national CfE 'policy'. My understanding of what is meant by curriculum policy was informed by a broad interpretation of 'curriculum' itself - encompassing overall educational goals, the structuring of curriculum content, pedagogy, and assessment (Nieveen & Kuiper, 2012). My broad understanding of 'curriculum' also emphasises that it is made and re-made in different contexts, and therefore that it is important to pay attention to the social practices involved in curriculum making (Priestley et al., 2021). My focus on curriculum making was informed by recent developments within the curriculum literature, which have drawn attention to the relevance of 'sites of activity' when considering how the curriculum is made and re-made (Priestley et al., 2021). This literature suggests that theorising curriculum making as occurring at different sites of activity emphasises that individuals can be involved in curriculum making in more than one site of activity. The site of curriculum making activity which was most relevant for this study was **macro**

curriculum making[3]. This site of activity focuses on defining curriculum goals, curriculum policy frameworks, statements of curriculum content, and other 'products' which can be used to inform curriculum making. Macro curriculum making can also involve specifying how other sites of curriculum making should operate. It tends to involve national policymakers but may also involve individuals who routinely work in a different site (such as teachers) (Priestley et al., 2021). Therefore, in defining 'policy', I was interested not just in tangible curriculum 'products' but in the social practices involved in macro curriculum making. I recognised the importance of this site on curriculum making elsewhere - as tensions and inconsistencies in understandings within, or in tangible 'products' produced by, the macro site of curriculum making will likely become apparent at other sites.

1.5 Research aim and questions

My overall aim for this doctoral study was to understand what the recent focus on 'equity' within Scottish education policy meant for Curriculum for Excellence (CfE) policy. Firstly, I wished to explore whether and how 'equity' had been articulated *within* CfE policy. Secondly, recognising that an explicit focus on 'equity' appeared to post-date CfE, I wished to consider any change over time in how the concept had been articulated, and what may have driven this. These aims were reflected in this study's three overarching research questions.

1. What interpretations of 'equity' have been advanced within CfE policy?

2. How have interpretations of 'equity' within CfE policy changed over time? What factors have driven any change?

3. What are the factors and considerations which explain the place of equity within CfE policy since its inception?

1.6 Who am I, and why was I interested in this topic?

My work on this doctoral study began in October 2015, after developing a proposal over the preceding summer. At that point, I was working for Education Scotland - a national

[3] Other sites of curriculum making include: supra (curriculum making by trans-national policymakers); meso (a 'middle' site of curriculum making, including the provision of guidance or other support); micro (curriculum making by schools); and nano (curriculum making by individual practitioners).

organisation focused on educational quality and improvement with the status of a Civil Service Executive Agency. Education Scotland had been created in 2011 by bringing together the functions of the previous school inspectorate and a national curriculum body, Learning and Teaching Scotland. Although Education Scotland was largely staffed by former frontline education practitioners, this was not my own professional background. I joined Learning and Teaching Scotland as a Research Officer in 2007, with the somewhat eclectic combination of a first degree in Politics and a master's degree in Marketing. My work within Learning and Teaching Scotland, and later Education Scotland, involved providing research and evaluation support to the wider organisation. By 2015, I was responsible for managing a small team of research and evaluation specialists.

The initial prompt for my interest in the topic of this study was my awareness of the growing emphasis within national policy on the socio-economic determinants of educational outcomes, along with increased use of the term 'equity'. When planning my PhD proposal in the summer of 2015, I was also particularly aware of the recent overview of the evidence relating to the 'attainment gap' in Scottish education, which had been carried out by two academics from the University of Strathclyde, and which I remember being much discussed. This review (Sosu & Ellis, 2014) was notable for being an up-to-date synthesis of the existing evidence about the socio-economic determinants of educational outcomes. The review identified a lack of emphasis on these determinants within important policy texts, including those relating to the curriculum, as illustrated below.

> *"An interesting feature of the agenda around poverty and educational achievement in Scottish education is that it is virtually invisible in the key documents that provide advice for schools and on-the-ground examples of policy and curriculum implementation. Curriculum for Excellence (CfE) affords schools and teachers the flexibility to design, plan and teach the curriculum in ways that offer bespoke solutions to the challenges their communities face. Support documents in the Building the Curriculum series need to show how this flexibility should be applied to address issues around poverty and educational attainment. […] research knowledge about poverty and educational achievement is not routinely used to frame, design, evaluate, analyse, report or tag curriculum development projects. This makes it hard to collate accounts of national and local education initiatives that close the attainment gap. The lack of routine focus on poverty seems inexplicable […]"* (Sosu & Ellis, 2014, pp. 45-46).

When reflecting on these findings, I could identify some tensions with my own understanding and experience of CfE. My experience was that colleagues were concerned

about the socio-economic determinants of educational outcomes. I could identify numerous pieces of work addressing this theme. For instance, shortly after joining Learning and Teaching Scotland in 2007, I was asked to summarise the findings of a review of Scottish education, carried out by the Organisation for Economic Co-operation and Development, which highlighted the impact of socio-economic status on educational outcomes. I also recall a copy of that review being given to all delegates at that year's Scottish Learning Festival - an annual conference for education practitioners organised by Learning and Teaching Scotland. At this point in my career, I was also strongly aware of the many changes that were taking place to develop and enact CfE policy. I was aware of the intention that CfE would improve learning experiences for all children and young people. Therefore, Sosu and Ellis' (2014) assertion that the topic of socio-economic status was "invisible" within CfE policy texts was surprising - and something that I wanted to explore in more detail through my doctoral research.

Aside from these professional experiences, and perhaps not something which I reflected on in detail at the time, my interest in this study's topic was prompted by two other factors. The first of these related to my position as someone without frontline professional experience of education working in a national education agency. Perhaps implicitly, therefore, undertaking the PhD was driven by a desire to be able to better understand education policy. The second factor was more personal. I have a strong personal commitment to social justice - influenced largely by my parents - but also by my own schooling experiences.

Attending my first workshop as a doctoral student in Education at the University of Stirling, in October 2015, now feels remote in many ways. Professionally, my career has moved on and I now work within the core Civil Service in Scotland, within the Scottish Government's Directorate for Early Learning and Childcare. I will return to this professional change in the concluding chapter and offer some reflections on it. Politically and culturally, the world also feels very different to the way it did in the autumn of 2015 - a time before 'Brexit', the election of Donald Trump as US President, the emergence of the most recent stark evidence of the looming climate emergency, and the global COVID-19 pandemic (which I have spent the last year working on in my new role). The final focus of this thesis is also different from the one that I envisaged in my proposal. My proposal was attuned to the potential issues posed by linking Curriculum for Excellence

(CfE) with the concept of 'equity'. It posed questions about understandings of 'equity', what factors informed these understandings, and how 'equity' was related to curriculum making. However, my initial aim was to undertake a more ambitious study, focusing both on curriculum making by teachers and curriculum policy. Although the focus of the study narrowed, the concept of 'equity', and a detailed exploration of what it means, have always been central to my interest in undertaking a PhD.

Despite the above social, cultural, political, and personal changes, the focus on 'equity' and the curriculum within this thesis feels more relevant than ever. As I noted above, poverty and inequality remain challenges for policymakers, and there is evidence that the impact of the COVID-19 pandemic has exacerbated existing inequalities. Many of the political and cultural challenges alluded to above - including the rise of populism and the climate emergency, but also emerging issues such as vaccine hesitancy - are also strongly linked to patterns of education, poverty, and inequality. Therefore, it is more important than ever that, if concepts such as 'equity' are used within education policy, there is a shared understanding of what they mean, and that any tensions between policy goals are acknowledged. I hope that the work presented in this thesis will help to make a small contribution to these important issues.

1.7 The structure of this thesis

Chapters 2 and 3 both draw on the existing literature. **Chapter 2** explores the problematic concept of 'equity' in more detail - considering the different ways it has been interpreted, including by education policymakers. It also outlines the main differences between 'equity' and the linked concept of equality. **Chapter 3** then moves on to explore how the concept of 'equity' could be linked to curriculum policy, drawing on the literature on curriculum regulation to do this.

Chapter 4 focuses on Curriculum for Excellence (CfE). By drawing on the literature, as well as a range of policy documents, it outlines how CfE policy developed between 2004 and 2021, over successive terms of the Scottish Parliament. It then critically examines CfE policy in light of the literature already considered in chapters 2 and 3.

Chapter 5 outlines the research methodology that I used to address the research questions set out above. It begins by describing my overall ontological and epistemological framework - Critical Realism - and the research design that this informed. It then outlines

how I gathered and analysed the two sets of data that this project is based on - CfE policy texts and interviews with policymakers. It also addresses ethical considerations and some of the issues that were pertinent to my status as an 'insider researcher'.

Chapters 6, 7, and 8 present the findings of my data analysis. **Chapter 6** covers the findings of my analysis of CfE policy texts, while **Chapter 7** focuses on the findings of my interviews with policymakers. **Chapter 8** then re-interprets these findings by using Margaret Archer's (1995) morphogenetic approach to explore the cultural and structural factors which may help to explain the findings.

Finally, **Chapter 9** concludes the thesis by summarising my findings in relation to the three research questions, addressing the study's limitations, and highlighting its contribution to academic knowledge and its implications for curriculum policymaking.

Chapter 2 - Literature review: the tricky concept of equity

2.1 Introduction

This chapter contributes to the overall structure of the thesis by examining 'equity' critically. As noted in chapter 1, the 'tricky concept' of 'equity' is now prominent within Scottish education policy but is a challenging one to define. This chapter first examines the ways in which the concept of 'equity' has been used within the literature. It then outlines how the literature has interpreted the linked principle of equality - recognising a significant amount of conceptual overlap between the two terms. This chapter then moves on to consider how educational policymakers have defined 'equity' - and illustrates some of the conceptual issues implied by recontextualising 'equity' within education policy.

2.2 Equity

2.2.1 Early interpretations of 'equity'

The term 'equity' had three different historical meanings within the English language (Unterhalter, 2009). Firstly, English translations of the Bible and works of classical Greek philosophy in the 14th century used *equitee* or *equite* to refer to a virtue embodying reasonableness, negotiation, debate, and respect for others' opinions. Secondly, during the 15th and 16th centuries, the legal profession adopted 'equity' to refer to a form of law making. For instance, in England individuals who were not satisfied with legal decisions made under common law could appeal directly to the Lord Chancellor (Björkman, 1985). Over time, the decisions resulting from such appeals formed a distinct body of Anglo-American "equity law". Equity law had a focus on moral as opposed to procedural justice, and so could re-interpret earlier legal decisions. Finally, in the 18th century, individuals involved in the development of modern capitalism and the financial system used the term 'equity' to refer to the ability of individuals to own "shares" of a commercial enterprise (Unterhalter, 2009).

2.2.2 'Equity' within the social sciences

'Equity' developed a distinctive meaning within the social sciences in the second half of the 20th century, emerging as a principle of distributive justice. Distributive justice addresses how material and social goods, such as wealth, opportunity, or power, should

be allocated (Cochran-Smith, 2009; Espinoza, 2007). This issue has preoccupied philosophers and theologians for centuries. For instance, Aristotle, Plato, and St Thomas Aquinas all considered distributive justice in their work (Espinoza, 2007).

The American sociologist George Homans influenced the development of 'equity' as a modern principle of distributive justice (Colman, 2015). Homans (1961) considered how distributive justice operated within social groups living in modern, industrialised societies. He suggested that individuals expected the rewards they received to be proportionate to the costs they had expended in different kinds of social and economic interactions. Homans (1961, p. 393) highlighted that this was a particularly salient issue in the context of post war America - remarking:

> *"Only in a few places like America are wages so high that workers can begin to interest themselves in the finer points of distributive justice; and this has consequences for both management and organized labor".*

In other words, Homans was concerned with how workers' perceptions of the fairness or unfairness of the financial and non-financial rewards they received could influence their attitudes to work.

In the 1960s and 1970s, researchers working within economics and social psychology built upon Homans' work (Finn & Lee, 1972). Economics researchers adopted the term 'equity' to describe input:output exchange relationships (Cook & Hegtvedt, 1983; Deutsch, 1975; Konow et al., 2020; Meindl, 1989; Reis & Gruzen, 1976). They described situations where an equal exchange took place as equitable, and those where inputs and outputs were out of proportion as inequitable (Finn & Lee, 1972). Social psychology researchers developed a body of 'equity theory' to describe exchange relationships (Walster & Walster, 1975). They also explored how individuals perceived the fairness of such relationships - with a particular focus on 'inequity' (defined as situations where inputs and outputs did not align) (Colman, 2015; Cook, 1975).

2.2.3 Defining contributions and rewards

This early literature focused on two facets of 'equity': inputs/contributions and outputs/rewards (Deutsch, 1975; Espinoza, 2007; Konow et al., 2020). It defined contributions variously in terms of an individual's: skill (Deutsch, 1975); motivation (Salomone, 1981); membership of a particular social group (Blanchard, 1986); or merit

(Grand, 1984). The literature also sometimes included need as a factor which could determine the rewards an individual should receive (Björkman, 1985; Grand, 1984; Salomone, 1981).

The literature highlighted the complexity of evaluating an individual's contributions or inputs (Grand, 1984). For instance, Schaffer and Lamb (1981) suggested that ideas about 'need' are in fact often the source of social disagreement - as needs are not fixed but are socially determined and change over time. Echoing this, Burbules and colleagues (1982) suggested that defining need also requires us to consider biological, cognitive, or psychological factors. They also suggested that needs must be defined in relation to the intended purpose of the exchange - as some needs will be more relevant to this than others. Some researchers have also viewed need as an alternative justice principle, which is conceptually distinct from 'equity' (Deutsch, 1975; Diederich, 2020). Other researchers (e.g. Hochschild, 1981) highlighted that, although needs differ, everyone has needs, and therefore attempts to respond to need should be informed by the principle of equality rather than 'equity'. Kittel (2020) built on this to suggest that need is typically defined by the absence of something, and therefore that a principle such as 'equity', which focuses on inputs, is unhelpful in theorising about how need should be addressed. These complexities inherent in defining need indicate that decisions informed by the principle of 'equity' tend to have a subjective or normative dimension (Bronfenbrenner, 1973; Farrell, 2012; Grand, 1984). Drawing on the work of Gans (1968), Salomone (1981, p. 11) highlights that such decisions are also likely to "require agreement about the major values of the society".

The emerging 'equity' literature also considered how shares of either outputs or rewards should be allocated in response to individual inputs. The key decision is whether shares should be allocated equally (Grand, 1984) or unequally (Salomone, 1981). The equal allocation of shares has been termed "horizontal equity" (Berne & Stiefel, 1994). For instance, equal shares could be distributed if individuals are judged to have equal skills, motivation levels, or needs. Alternatively, shares could be allocated unequally if inputs or contributions differ (Blanchard, 1986). This has been termed "vertical equity" (Berne & Stiefel, 1994) or "equitable individualisation" (Schaffer & Lamb, 1981).

2.2.4 Further development of ‘equity’ within the social sciences

‘Equity’ has continued to be explored in research studies within economics, social psychology, sociology, and management/business studies up to the present day (Diederich, 2020; Hatfield et al., 2011; Law, 2016). In the 1980s researchers working with the concept of ‘equity’ began to focus more on articulating the different rules which could underpin equitable individualisation (Meindl, 1989). Sociologists also adopted the term ‘equity’ to explore how individuals perceived inequalities (Liebig & Sauer, 2016). Researchers in business studies highlighted that the principle of ‘equity’ reflected an individualistic, Western understanding of worker motivation, and therefore that it was not necessarily a universal one (Fadil et al., 2005). Interestingly, many researchers working with the concept of ‘equity’ also questioned whether there was value in applying it outside of economic or industrial analysis (Reis & Gruzen, 1976). They often saw equality as a better basis for questions of distributive justice that focused on outcomes such as good interpersonal or community relationships (Liebig & Sauer, 2016; Morand & Merriman, 2012). This highlights the close, and often confused, relationship between ‘equity’ and equality as principles of distributive justice - which I will return to below.

2.2.5 A brief return to the ‘equity’ image, and my own interpretation of equity

Before moving on to Section 2.3, I wish to outline my own interpretation of ‘equity’, which I have always used within quotation marks up to this point in the thesis. Having considered the literature about the emergence of the term, I find Schaffer and Lamb’s (1981) conceptualisation of ‘equity’ as “equitable individualisation” most helpful. This framing encompasses what equity’s *distinctive* elements appear to be: paying attention to an individual’s specific characteristics and needs; adapting what an individual receives as a result; and the requirement that shares can be unequal if this is justified by an individual’s needs or circumstances. I also find the literature’s emphasis on the necessarily subjective nature of equity persuasive, due to its inherent focus on knowing an individual well enough to judge how best to respond to their needs.

Therefore, the first ‘equity’ image from chapter 1 (shown in Figure 1 on page 15) does **not** fully reflect what appears to be the concept’s distinctive nature. The image shows the **results** of an equitable process (a re-allocated set of crates). However, the principle of equity relates not to results (outcomes) but to the **process itself**. The right-hand image

shows the re-allocated crates, which allow the boys to see the baseball game. However, it does not depict what has led to this outcome. For instance, did the boys move the crates themselves? Or did someone else help them? The absence of any sense of equity as a process is likely due to the image's original purpose. I noted in chapter 1 that Professor Froehle, the creator of the first image, had originally intended it to illustrate equality of outcome. Whether it does this or not, the re-interpretations of the right-hand image as a depiction of 'equity' do not reflect a strong understanding of what makes the concept distinctive. Due to the range of different interpretations of equity which exist, in later sections of this thesis I will make clear whether I am referring to my own preferred framing of equity - by defining it as equitable individualisation - or to what I consider to be less conceptually helpful interpretations - by continuing to use quotation marks or by clarifying an alternative meaning (e.g. 'educational equity'). Having offered some definitions of the principle of equity, and outlined my own interpretation of it, I will now move on to sketch out the key elements of the principle of equality. As I noted in the introduction, it is helpful to consider equality, as I will show that there is considerable conceptual overlap between this term and equity.

2.3 Equality

2.3.1 18th and 19th century interpretations of equality

The modern concept of equality emerged during the Enlightenment period (Björkman, 1985). Enlightenment thinkers such as Immanuel Kant and Adam Smith proposed that all citizens held certain natural rights (Bell, 1976; Chaney, 2011; Rosen, 2003). This new paradigm of 'natural liberty' influenced subsequent attempts on the part of revolutionary movements and social reformers to gain and extend rights to political participation - for instance through the French Revolution or the United States' Declaration of Rights (Espinoza, 2007; Frankel, 1971; Nisbet, 1975; Rawls, 1999; Salomone, 1981). This "political equality" interpretation of equality also brought with it the idea that there was a moral equality among all citizens (Chaney, 2011).

In the 19th century there were several critiques of the initial interpretation of equality in relation to natural, political, or moral rights. These critiques emphasised that such equal rights could still go hand in hand with significant inequalities in access to social or economic goods (Frankel, 1971). The development of liberal political ideas, influenced

by Utilitarian thinkers such as Jeremy Bentham and John Stuart Mill, also focused attention on the links between individual happiness and the most effective distribution of social or economic goods (Rosen, 2003). These critiques informed the formulation of a new interpretation of equality - equality of opportunity. Equality of opportunity required that opportunities to achieve valued social or economic positions and goods were "fair", as well as being guaranteed in law or in practice (Bell, 1976; Rawls, 1999). This interpretation of equality implied that society should attempt to widen access to social goods, such as education (Rawls, 1999; Rosen, 2003).

2.3.2 Equality in the 20th century

Equality of opportunity remained the dominant interpretation of equality well into the 20th century. However, it was also critiqued on several grounds. For instance, progressive critics highlighted that formal equality of opportunity can exist within a society which has large inequalities of wealth and income (Frankel, 1971). Critics also posed important questions about whether all individuals *can* equally take advantage of equal rights and opportunities, given existing structural inequalities (Papastephanou, 2018). Critics also drew attention to the often-competitive nature of attempts to ensure equality of opportunity (Gillies, 2006; Reed & Oppong, 2005; Wolff, 2015). A more recent interpretation of equality of opportunity therefore differentiates between inequalities that arise from circumstances that individuals cannot control and those that arise from personal choice (Phillips, 2004).

The period following the Second World War saw an increased focus on the equality of outcomes as a counterpart to equality of opportunity (Nisbet, 1975). In part, this was influenced by a new body of sociological research, often with an educational focus, demonstrating that formal equality of opportunity had failed to realise greater equality in outcomes (Coates & Silburn, 1970; Harvey, 1989; McPherson & Raab, 1988; Tyler, 2011). Equality of outcome can be considered at the level of subgroups within the wider population or in relation to individuals (Phillips, 2004). Subgroup characteristics include age, race, or gender, while individual characteristics relate to ability, character, or personality (Phillips, 2004). The principle of equality of outcome has often been seen as an easier one to realise at subgroup than at individual level (Phillips, 2004). Various social programmes that aimed to achieve greater equality in subgroup outcomes were established from the 1960s onwards. Such programmes often involved additional

financial resources or "positive discrimination"/"affirmative action" approaches to allow previously disadvantaged groups to achieve outcomes such as higher education qualifications (Benadusi, 2007; Crosby et al., 2006; Kodelja, 2016).

Equality of outcome became an extremely controversial interpretation of equality from the 1970s onwards. Thinkers such as Friedrich Von Hayek and Robert Nozick challenged attempts to reframe the principle of equality in relation to outcomes (Wolff, 2007; 2015). Such critics attempted to return to earlier interpretations of equality that had emphasised natural and political rights, or opportunity (Arnott, 2011). In justifying these critiques, thinkers highlighted that attempting to equalise outcomes was inhibiting economic growth, which they saw as a social harm (Wolff, 2015). Critics of equality of outcome also labelled interventions to realise it as attempts to bring about "complete levelling" (Bell, 1976, p. 628). Despite these criticisms, many attempts to realise more equal outcomes did not seek to achieve this through processes of standardisation or levelling down. Instead, they focused on improving access to resources or additional support, or facilitating access, at subgroup level. Therefore, there is an element of caricature in subsequent criticisms of equality of outcome - with, as Phillips (2004, p. 2) notes, equality of opportunity then being established as the "mild-mannered alternative to the craziness of outcome equality". Though controversial, equality of outcome remains part of contemporary understandings of equality. It has been used to inform recent policy responses such as those related to gender representation among political candidates (Phillips, 2004). It is also still commonly cited as an important 'test' of whether equality of opportunity has been realised (Phillips, 2004).

Having considered the principle of equality, I now go on to explore how the principle of equity has been recontextualised (Bernstein, 1990) within education policy. In doing this, I will reference the discussion of equality within this chapter to illustrate some of the conceptual confusion involved in interpretations of educational 'equity'.

2.4 Policy interpretations of 'educational equity'

2.4.1 'Educational equity' within the education policy literature - overview

So far, this chapter has outlined two principles of distributive justice: equity and equality. I have suggested that, for me, a framing of equity as equitable individualisation is helpful in capturing the distinctive character of this principle. I now consider how education

policy has defined the principle of equity. Firstly, I provide a brief overview of the literature on equity within education policy. I then discuss five different ways in which policymakers have interpreted 'educational equity'. Drawing on the literature, I highlight several conceptual inconsistencies with these interpretations. Finally, I reflect on the usefulness of concepts of 'educational equity'.

International bodies such as the Organisation for Economic Co-operation and Development (OECD) began to use the term equity within their education policy work in the 1990s (Levin, 2003; Samoff, 1996; Savage et al., 2013; Thomson, 2013). Concurrently, these organisations have increased their influence over national education policy (Cairney & Kippin, 2021; Mundy & Ghali, 2009). As a result, many countries now claim that their education policies are informed by the principle of equity (Cairney & Kippin, 2021).

Since the mid-2000s education researchers have referred to equity much more frequently - which may reflect its new prominence within policy (Jurado de Los Santos et al., 2020). However, many researchers do not use the term in a precise or helpful way. Firstly, they often use equity prominently, for instance in the title of a piece of work, but do not define it (e.g. as seen in work by Burroughs et al., 2019; Nieto, 2000; Sleeter, 2008; Swanson et al., 2017). Secondly, many researchers define equity loosely, for example in relation to 'social justice', 'inclusion', or 'fairness' (e.g. as seen in work by Ainscow, 2016; Chapman & Ainscow, 2021; Dyches & Boyd, 2017). Thirdly, researchers sometimes adopt definitions of equity from international organisations, in particular the OECD, without critical scrutiny (e.g. as seen in work by Ainscow, 2016; Chapman & Ainscow, 2021). Finally, researchers sometimes attribute the term equity to earlier educational work which did not, in fact, use the term (e.g. as seen in Chu's (2019) interpretation of Guiton and Oakes' (1995) work). In fact, researchers often use the terms equity and equality interchangeably (Björkman, 1985; Cochran-Smith et al., 2016; Espinoza, 2007; Papastephanou, 2018). Generally, researchers do not refer to equity's earlier, relatively precise meaning within the social sciences (which I have referred to as equitable individualisation).

Several researchers have documented these issues within the literature. For instance, Cairney and Kippin (2021) highlight that equity is a slippery and contested term within education policy research, based on their literature review of 109 articles focused on

education policy and equity. Therefore, much of the large literature on 'educational equity' is often unhelpful in defining what it means. However, a more limited body of literature does identify several distinct understandings of 'educational equity' within education policy - which I categorise as follows.

1. **Equity 1:** with 'equity' framed as **access to educational provision**, or **opportunities to progress** within education, often within the context of international development.

2. **Equity 2:** with 'equity' defined as a **differentiated response to children and young people's individual needs and circumstances** (such as sex, race, ethnicity, or socio-economic status).

3. **Equity 3:** where 'equity' is viewed as **a minimum level of performance** (for example in literacy or numeracy), as seen within international development goals or international benchmarking by organisations such as the OECD.

4. **Equity 4:** with 'equity' defined as the **'equalisation' of outcomes between subgroups**.

5. **Equity 5:** where '**equity' is defined in relation to attainment gaps and measured performance,** with a heavy focus on data as the central mechanism for tracking and monitoring whether outcomes have been achieved.

In the following sections, I discuss each of these understandings of 'educational equity' within policy and highlight some of the conceptual inconsistencies associated with them.

2.4.2 Equity 1: Equity as access and opportunities

International and national policymakers prioritised access to education in the decades following the Second World War (Klees & Qargha, 2014). Originally, organisations such as UNICEF defined access to education as a fundamental human right, but more recently they have reinterpreted access as educational 'equity' (Klees & Qargha, 2014). International organisations, such as UNICEF, have used 'equity' to refer to longstanding international development goals such as access to universal primary education (Farrell, 2012; Klees & Qargha, 2014). Individual countries have also used 'equity' to describe policy activity that is focused on educational access (Cairney & Kippin, 2021). For

instance, state-level education policy documents in the United States use access as one of the most common interpretations of 'equity' (Chu, 2019). In developed countries, policymakers tend to use 'equity' to refer to access and progression within the secondary and tertiary stages of education (Farrell, 2012; Klees & Qargha, 2014). Policymakers have also interpreted educational 'equity' in relation to opportunities, with this understanding being particularly evident in the work of international organisations, such as UNICEF and the OECD (Cairney & Kippin, 2021; Klees & Qargha, 2014). For instance, the OECD (2012, p. 9) states that in equitable education systems:

> *"[…] the vast majority of students have the opportunity to attain high level skills, regardless of their own personal and socio-economic circumstances."*

Policymakers in the United States and in Australia have also echoed this framing of 'equity' as opportunity (Bulkley, 2013; Savage, 2013).

However, some literature has critiqued policymakers for defining access and opportunities as 'equity'. Several authors have referred to the way in which access and opportunity were once seen as the hallmarks of competitive, selective educational structures, for instance in the 19th and early 20th centuries (e.g. Chu, 2019; Cochran Smith et al., 2017). As I noted in section 2.3, equality originally focused on equal resources or provision for everyone, with no reference to their individual circumstances, on the basis that everyone has equal natural or political rights. In the 19th century, the principle of equality shifted to include equality of opportunity, which emphasised the importance of fair competition for all. In the 19th and 20th centuries policymakers used the principle of equality of opportunity to underpin the meritocratic 'sorting' of children and young people within state education systems, often underpinned by ideas of financial efficiency (European Group for Research on Equity in Educational Systems, 2005; Lodge & Blackstone, 1982). There is an established body of literature critiquing the concept of educational equality of opportunity (e.g. Bell, 1976; Chaney, 2011; Gamoran & Long, 2007; Tawney, 1931). For instance, Tawney (1931, p. 142) viewed equality of educational opportunity as the "tadpole philosophy" of society, in which only a few individuals could move to more favourable positions.

Reflecting these critiques, defining 'equity' only in relation to access and opportunities has been described as a "thin" understanding of this principle (Cochran-Smith et al., 2017). As I noted in section 2.2 above, my own preferred interpretation of equity, drawing

on the literature, is as a differentiated response to individual needs or circumstances. Defined in this way, equity does not emphasise equality of shares or treatment, although these can be equal if individual needs are also the same. Therefore, I would agree that it is not helpful to define 'educational equity' in relation to access or opportunities. Although educational access and opportunities are extremely important, conceptually they appear much better aligned to the principle of equality. However, equity may then be a helpful secondary principle. For instance, realising equal opportunity may sometimes imply the unequal distribution of resources (Bulkley, 2013), which is conceptually closer to the principle of equity defined as equitable individualisation.

2.4.3 Equity 2: Equity as a response to individual needs and characteristics

The second framing of 'educational equity' within the literature is much more aligned to my own understanding of what makes this term distinctive. Policymakers have sometimes interpreted 'educational equity' as a differentiated response to children and young people's individual needs and characteristics (Cairney & Kippin, 2021; Chu, 2019). They have identified a wide range of characteristics or needs which require an equitable response, including sex; race; ethnicity; socio-economic status; immigrant or refugee status; fostered or looked after status; sexuality; and geographic area or region (Cairney & Kippin, 2021; Chu, 2019). Some of these are innate characteristics, while others *could* be modified by wider public policy (e.g. socio-economic status). Policymakers have also defined relevant 'inputs' that could be tailored in response to these characteristics. For instance, at international level the OECD has developed a set of 10 policy actions that countries can adopt to realise greater 'equity' (Bøyum, 2014). These include ensuring that resources are directed to children and young people with the greatest needs (Bøyum, 2014). At national level, countries have attempted to adjust several elements of educational provision to ensure a higher level of equitable individualisation (Schaffer & Lamb, 1981). These include the use of 'high quality' teachers; remedial teaching; curriculum differentiation; or specific curriculum interventions in areas such as literacy and numeracy (Bulkley, 2013; Cairney & Kippin, 2021; Chong, 2017; Cochran Smith et al., 2017). Many countries have also adjusted the allocation of education funding to take account of factors such as socio-economic status (Gilead, 2019).

Interpreting ‘educational equity’ as a response to individual needs and characteristics aligns with the principle of equity’s distinctive focus on differentiation and fairness (Blanchard, 1986; Bronfenbrenner, 1973; Burbules et al., 1982; Espinoza, 2007; Salomone, 1981; Samoff, 1996; Schaffer & Lamb, 1981; Tyler, 2011). This interpretation of ‘educational equity’ has much in common with earlier ‘compensatory’ education policies. Compensatory education involved the unequal distribution of resources to address inequalities within wider society (Kornhaber et al., 2014). These approaches first emerged within education policy in the 1960s (Kogan, 1975). As I noted in section 2.2, during this period there was an increased emphasis on the equality of outcomes. Compensatory approaches aimed to improve the outcomes of those with the greatest needs, rather than to equalise outcomes for everyone, although they were later attacked on these grounds (Evetts, 1970). More recently, policymakers have continued to adopt compensatory approaches of various kinds, such as Sure Start, Education Action Zones and the Excellence in Cities Programme under the 1997-2010 UK Labour Governments (Power, 2008).

I suggest that ‘Equity 2’ - with ‘educational equity’ framed as differentiated treatment in response to individual needs and characteristics - is the most helpful of the education policy interpretations of the concept. This is because defining ‘educational equity’ in this way has much less conceptual overlap with equality, and the term can therefore be used to inform thinking about who should receive additional (or the same) resources or support, why they should receive these, and what kinds of resources or support they should receive.

2.4.4 Equity 3: Equity as a minimum level of performance

The third policy framing of ‘educational equity’ identified by the literature defines it as a minimum level of performance. This idea has existed since the 19th century; however, the definition of the minimum level has shifted over time. In the 19th century, governments introduced state education systems, as increasing industrialisation meant that all workers required a minimum level of education (Anderson, 1995). Policymakers defined this minimum in relation to the reading, writing, and arithmetic skills which could be achieved by all during an elementary stage of schooling. More recently, governments have focused on a higher minimum standard of education that is believed to be important to ensure economic and democratic participation for all (Benadusi, 2007; Raffe, 2008;

Samoff, 1996; Strike, 1985; Tyler, 2011). At international level, both the OECD and UNICEF have included a minimum level of performance within their definitions of 'educational equity.' For instance, the OECD (2012, p. 9) states: "[…] all individuals reach at least a basic minimum level of skills (inclusion)". Similarly, UNESCO - the United Nations Educational, Scientific and Cultural Organization - includes the following target for 2030 (2015, p.35):

> *"all girls and boys complete free, equitable and quality primary and secondary education leading to relevant and effective learning outcomes".*

International organisations have also linked a minimum level of performance to an individual's later work-related outcomes (European Group for Research on Equity in Educational Systems, 2005). The OECD's international benchmarking work has played an influential role in determining what a minimum level of skills should be, for instance in relation to reading proficiency (Martino & Rezai-Rashti, 2013). A minimum level of performance is also a strong feature of some national interpretations of 'educational equity' - such as in Finland - where there is a focus on ensuring that:

> *"[…] everyone should reach the "finishing line" of basic education and master the most important skills before transitioning to secondary level."* (Chong, 2018, p. 555)

I suggest that the definition of a minimum standard of performance does not align with the distinctive character of equity. Instead, it would appear to align far more strongly with the principle of equality. This is because definitions of a minimum standard tend to emphasise that it should be achieved by all, or almost all, members of a population (Bowman, 1975; Tyler, 2011). In addition, the principle of equity is not specifically concerned with (educational) outcomes. It does not imply that outcomes should always be equalised (Salomone, 1981). When the principle of equity is used to inform distributive justice decisions, the most important consideration is the balance of inputs and outputs (Liebig & Sauer, 2016). If unequal outputs can be justified based on unequal inputs, the underlying principle of equity can still be served (Liebig & Sauer, 2016).

Therefore, although defining the achievement of a minimum level of performance as 'educational equity' is problematic, as with 'Equity 1' the principle of equity may again be helpful in informing thinking about how everyone can be supported to reach such a minimum standard. However, there are also broader questions about the extent to which

a minimum standard of performance can be compatible with highly unequal outcomes at a higher level. Setting a minimum level of performance could be a more achievable way for policymakers to realise equality of outcome at the individual level (Bulkley, 2013). Despite this, if the minimum standard is pitched at too low a level, realising it may ultimately do little to improve overall outcomes for groups or individuals who are most in need. Therefore, there is a need to consider the balance between the ease of achieving policy aims and the overall value of a defined minimum level of performance for all individuals.

2.4.5 Equity 4: Equity as outcomes achieved at group or individual level

A fourth interpretation of 'educational equity', which has become more prominent in recent years, relates strongly to outcomes (Bulkley, 2013). For instance, the European Commission includes the following within its definition of 'equity'.

> *"Equitable systems ensure that the outcomes of education and training are independent of socio-economic background and other factors that lead to educational disadvantage and that treatment reflects individuals' specific learning needs"*(European Commission, 2006, cited in Hippe et al., 2016).

This extract highlights that a key element of defining 'equity' relates to the outcomes achieved by subgroups, here framed in relation to socio-economic status and 'other factors'. Policymakers at national level have also frequently defined equity in this way, for instance the equalisation of outcomes between subgroups is an important element within the 'No Child Left Behind' policy in the United States (Bulkley, 2013). However, Chu (2019) notes that this interpretation of 'equity' is less prevalent within the United States than those focused on access and opportunities. Bulkley (2013) highlights that deciding which educational outcomes should be made more equal is not straightforward - as outcomes can be defined in relation to attainment, wider achievement, or participation.

'Equity 4' reworks an influential interpretation of equality that emerged in the 1960s. This redefinition of equality emerged from a sociological study of educational opportunity led by James Coleman and commissioned by the United States' government (Coleman, 1968). The study's report explored the equality of educational achievement, or outcomes, between subgroups - with outcomes defined as "equal performance on standardised achievement tests" (Bell, 1976, p. 618). The Coleman study highlighted that

there were clear differentials in such test results related to socio-economic status (Bell, 1976). Coleman's reinterpretation of educational equality as more equal performance between subgroups represented a conceptual shift in how educational equality was defined - from inputs to outcomes (Coleman, 1968; Kodelja, 2016). At group level, equality of outcome involves ensuring the proportional equal achievement of outcomes by subgroups defined in relation to race, socio-economic status, sex, or other relevant categories (Espinoza, 2007; Frankel, 1971). At individual level, equality of outcome implies the need to bring all children and young people to the same level of educational performance (Bowman, 1975; Tyler, 2011). In its most extreme interpretation this would require halting progress by some individuals until others caught up (Bøyum, 2014). However, in practice attempts to equalise educational outcomes from the 1960s onwards tended to involve the kinds of compensatory approaches discussed in section 2.4.4, or in setting a minimum level of performance ('Equity 3'), rather than attempts to standardise outcomes.

As with 'Equity 3', I suggest that describing attempts to equalise outcomes at the group or individual level as 'equity' is problematic, as the core concept of equity does not concern itself with outcomes. Therefore, an equitable approach would emphasise providing appropriate individual support based on relevant needs or characteristics (European Group for Research on Equity in Educational Systems, 2005). In contrast, the principle of equality of outcome, as Phillips (2004) has noted, can be more helpfully seen as a yardstick by which to assess whether individuals with different characteristics have achieved more equal outcomes. Policymakers' recent preference for defining 'educational equity' in relation to outcomes may be linked to the negative associations which equality of outcome developed from the 1970s onwards, such as the complete levelling of outcomes (Benadusi, 2007).

2.4.6 Equity 5: Equity as attainment gaps/measured performance

The final policy-related interpretation of 'educational equity' within the literature focuses on attainment gaps and measured performance. This is related to the framing of equity as outcomes, and so has parallels with 'Equity 4'. However, several authors have argued that international organisations have promoted the development of a very specific interpretation of 'equity' over the last two decades (Cairney & Kippin, 2021; Klees & Qargha, 2014; Loughland & Sriprakash, 2014; Samoff, 1996). This interpretation is

heavily focused on accountability (Luke, 2011; Rezai-Rashti et al., 2017; Rizvi & Lingard, 2011; Thomson, 2013). It defines 'equity' in relation to attainment gaps at subgroup level, and therefore views data as a central mechanism for reporting on and measuring 'equity' (Luke, 2011; Rizvi & Lingard, 2011).

Several authors have drawn attention to the significant role played by the OECD in influencing the development of this interpretation of 'educational equity'. Mundy and Ghali (2009) highlight a shift in the focus of the OECD's education work since the 1990s. Influenced largely by education reforms in the United States from the 1980s onwards, the OECD expanded its role in the development of quantitative indicators to benchmark and compare education systems (Mundy & Ghali, 2009). This represented a step change from its previous role as a facilitator of education policy learning. In relation to 'equity', the OECD's main reporting tool is the 'index of Economic, Social and Cultural Status' (ESCS) used within its PISA assessments (OECD, 2012). The ESCS index is based on the results of a questionnaire that participating young people complete (Avvisati, 2020). The ESCS index combines into a single score measures of the financial, social, cultural, and human capital which young people and their families can access (Avvisati, 2020). However, the index is likely to be influenced by the accuracy of self-reporting, missing data for some countries, and the validity of some measures across countries (e.g. in relation to the number of household possessions) (Avvisati, 2020). The literature has also highlighted that such measurement approaches can lead to a one-dimensional understanding of inequality at an individual or a country level (Luke, 2011; Martino & Rezai-Rashti, 2013). There is a risk of backgrounding the wider societal or structural factors that influence inequalities in outcomes (Kerr & Raffo, 2016; Klees & Qargha, 2014; Rezai-Rashti et al., 2017; Thomson, 2013).

Again, therefore, framing 'educational equity' as measured performance does not align conceptually with the core principle of equity. As discussed above, equity involves exploring whether rewards and contributions are in proportion - with no reference to outcomes. Therefore, an approach which aims to track, measure and report on outcomes does not align with it. In fact, unlike the previous four framings of 'educational equity', 'Equity 5' does not appear to have any necessary link to either the principles of equality or equity.

2.4.7 Summary of interpretations of 'educational equity'

In the discussion above, I used the literature to identify five visible framings of 'educational equity' within international and national education policy.

- **Equity 1:** as access and opportunities
- **Equity 2:** as a response to individual needs and characteristics
- **Equity 3**: as a minimum level of performance
- **Equity 4:** as outcomes at subgroup or individual level
- **Equity 5:** as attainment gaps and measured performance

I have also identified several conceptual issues with using the term 'equity' to refer to all these five interpretations.

- **Equity 1** may be more helpfully aligned to the principles of **equality of access and opportunity**, as the policy intention tends to be to ensure equal access and opportunities for all children and young people, regardless of their individual circumstances or needs. However, equity may still be a helpful principle to inform the targeting of the differentiated approaches that would likely be needed to realise equality of access or opportunity.
- I have suggested that **Equity 2** is the most helpful framing to label in this way, as it is most closely aligned to the core principle of **equity**, due to its focus on differentiated responses to individual circumstances or needs.
- **Equity 3 and 4** appear more closely aligned to the concept of **equality of outcome**. This is because the principle of equity does not concern itself with outcomes. However, equity may again be a helpful principle in informing thinking about what support individuals would need to achieve a minimum set of outcomes, or more equal outcomes.
- **Equity 5** does not appear to be necessarily informed by either the principles of equity or equality. As a measurement approach, it could focus on inputs, outputs, or outcomes. It is likely that this interpretation of 'educational equity' is much

more heavily influenced by the wider emphasis on performance management within current education policy.

Therefore, I suggest that it is helpful to define only one interpretation of 'educational equity' - 'Equity 2' - using this term. If this is the case, the key question is - why is 'equity' so heavily used within education policy, if it brings with it such conceptual confusion? Rizvi and Lingard's (2011) characterisation of 'equity' as an 'assemblage' may be helpful in considering this question. These authors highlight that, as 'equity' has been defined in so many ways, it cannot provide sufficient guidance on how it should be realised within education policy - without reference to other values such as excellence, justice, and efficiency. Savage (2013, p. 188) also notes that there is no single framing of 'equity' in contemporary policy, but that it:

> *"is a flexible and contestable concept, capable of being rationalised in multiple ways and towards multiple ends".*

Interestingly, several authors have suggested that policymakers may also prefer 'equity' as they have seen it as a more palatable term than equality (Benadusi, 2007; Björkman, 1985). Cairney and Kippin (2021, p.10) highlight that the use of 'equity' by governments can allow a range of policy responses to be seen as 'fair':

> *"[…] equity policies focusing on social determinants, social justice, and inclusion, struggle to compete. They are overshadowed by more politically salient debates on the relationship between economic growth/ competitiveness and education […] Almost all of these policies shelter under the umbrella term 'education equity' even if they achieve no such thing".*

2.5 Conclusion

In this chapter I have shown that, although equity has several older associations within the English language, it originated within the social sciences literature in the 1960s as a clearly defined principle of distributive justice. As a quasi-economic concept, it emphasised the need for inputs and outputs to be proportionate. There have been many different interpretations of the meaning of these inputs and outputs, and how they should be balanced. The principle of equity is largely distinct from the older principle of equality, which offers an alternative basis for distributive justice. The principle of equality has also shifted over time and now encompasses interpretations relating to equal rights, equal opportunities or (more) equal outcomes. I have suggested that the most helpful

interpretation of equity is one focused on equitable individualisation (Schaffer & Lamb, 1981), as this recognises its distinctive characteristics.

Since the 1990s, national and international education policy has adopted the term 'equity'. The educational literature has mirrored this increased focus on 'educational equity' - with references to this term increasing substantially from the mid-2000s. However, the literature often uses 'equity' in superficial and unhelpful ways. Despite this, it is possible to identify five main interpretations of 'educational equity' within international and national policy - those focused on: (1) access and opportunities; (2) individual needs and characteristics; (3) a minimum level of performance; (4) outcomes; and (5) attainment gaps and measured performance. I have shown that very few of these interpretations relate to 'equity' as a principle of distributive justice. In fact, they relate to different facets of the principles of equality and equity - with interpretation (2) having most in common with the core principle of equity, but 'equity' likely to be a helpful principle in operationalising interpretations (3) and (4). Therefore, the policy concept of 'educational equity' is often used to assemble different interpretations of equity and equality in a sometimes-uneasy mix. However, the literature highlights that using equity may have certain political and cultural uses - by allowing governments to present a range of policy responses as 'fair'.

In chapter 1, I labelled equity as a 'tricky concept'. In this chapter, I hope that I have provided a clearer sense of what it means. I have also demonstrated that the 'trickiness' associated with equity is less to do with it not having a clear meaning - which I have shown it does - but largely due to its unhelpful recontextualisation within education policymaking. In chapter 3 I will now move on to consider what equity means for curriculum policy.

Chapter 3 - Literature review: equity and curriculum policy

3.1 Introduction

In chapter 1, I highlighted that Scottish education and curriculum policy currently has a strong focus on the term equity. In chapter 2, I suggested that equity does have a clear meaning - one focused on equitable individualisation in response to someone's characteristics or needs. I then drew on the literature to suggest that, within education policy, the concept of 'educational equity' has five main interpretations. One of these had strong conceptual links to equity defined as equitable individualisation. However, I went on to demonstrate that the other interpretations of 'educational equity' were conceptually less strongly related to the core principle of equity. In chapter 3, I now move on to consider how equity might relate to curriculum policy. I first consider how curriculum policy researchers have conceptualised social justice. I then use the curriculum policy literature to identify several recent shifts in curriculum policymaking. Finally, I discuss how these curriculum policy trends may relate to the principle of equity.

3.2 Social justice and equity in the curriculum policy literature

In chapter 2, I highlighted that equity and equality are both principles of distributive justice. However, many curriculum researchers have tended to draw on recent conceptual work which seeks to move beyond distributive justice. The first of these sets of ideas is the capabilities approach, which draws on the work of philosophers such as Amartya Sen and Martha Nussbaum. Capabilities are "what people are actually able to do and to be" (Nussbaum, 2003, p. 39). Nussbaum contrasts the capabilities approach with distributive justice, which she sees as having a relatively narrow emphasis on allocating financial resources. She suggests that focusing on capabilities can highlight when individuals require different kinds and amounts of support to achieve capabilities, due to their different needs and starting points. Therefore, the capabilities approach has some conceptual overlap with the principle of equity - which also differentiates rewards based on such factors. However, it moves beyond the principle of equity due to its insistence that realised outcomes (capabilities) remain important (Nussbaum, 2003). As I noted in chapter 2, the principle of equity focuses on whether contributions and rewards are in balance.

Curriculum researchers have drawn on the capabilities approach in different ways. For instance, Deng (2021) suggests that it provides a helpful reminder for curriculum research, which has recently had a strong emphasis on access to knowledge, that individual outcomes are also important. Lambert and colleagues (2015) use the capabilities approach to inform a study of the ways in which teachers can communicate geographical knowledge. Like Deng (2021), they also highlight its potential in articulating curriculum purposes. Price (2015) and Terzi (2007) have also used the capabilities approach to inform work focused on meeting the needs of children and young people with disabilities. Wood and Deprez (2012) welcome the capability approach's emphasis on individual capabilities, contrasting this with other ways of thinking about social justice which have focused on the outcomes achieved by subgroups.

Curriculum researchers have also drawn on a second set of ideas which seek to move beyond distributive justice. These come from the philosopher Nancy Fraser's (1999) work on conceptualising social justice. Fraser defines three elements of social justice. First, redistributive justice is aligned to the distribution of economic resources. Second, recognitive justice relates to the need to acknowledge the lives and perspectives of previously marginalised groups, such as ethnic or sexual minorities, or women. This understanding of justice therefore focuses on the cultural factors which can often drive inequalities. Finally, participative justice relates to the extent to which individuals can fully participate in political decision making (Keddie, 2012).

Several curriculum researchers have drawn on Fraser's three concepts of social justice. Keddie (2012) notes that distributive justice has been central to policymakers' attempts to address educational inequality. These attempts have typically involved allocating extra financial or human resources to support children and young people who have certain defined characteristics or needs (Keddie, 2012). Lingard (2007) links the concept of redistributive justice to curriculum content (knowledge) in his study exploring the concept of 'productive pedagogies'. Likewise, Luke and colleagues (2012) relate Fraser's concept of redistributive justice to curriculum access, but also to opportunities to achieve valued curriculum outcomes. They also suggest that recognitive justice relates to ensuring that previously marginalised voices or experiences are included within the curriculum. Similarly, for Atweh (2007), recognitive justice provides scope to question accepted elements of the curriculum from different perspectives.

Although the work of Sen, Nussbaum and Fraser offers helpful perspectives which challenge and extend the principles of distributive justice, my focus remains on the 'tricky concept' of equity. However, curriculum researchers have tended to use the term 'equity' in similar ways as those that I described in chapter 2 - meaning that it has an undefined place within the curriculum literature. For instance, Luke and colleagues (2012) refer to 'equity' in at least four different ways: as a characteristic of an education system; as a characteristic of educational outcomes; as a characteristic of pedagogy; and in line with the OECD's policy-focused definition of 'equity'. Wahlström (2014) uses the term 'equity' in relation to an expansive understanding of "educational opportunity", which, as I noted in chapter 2, is more closely associated with the principle of equality. Keddie (2012) identifies 'equity' as a redistributive principle but does not offer a definition of what makes this term distinctive.

3.3 The "technical form" of the curriculum and equity

Although there does not appear to be a well-developed body of curriculum policy research which has engaged in detail with the principle of equity, I have drawn on the concept of the "technical form" of the curriculum (Luke et al., 2012) to make these conceptual links. These authors define the technical form of the curriculum as follows.

> *"We will argue and attempt to demonstrate that high definition, or extremely elaborated, detailed and enforced technical specifications and low definition, that is, less elaborated, detailed and constrained curriculum act as degrees of central prescription. We suggest that these levels of prescription - from high through to low - in turn set the conditions for local teacher professionalism or workforce deprofessionalization. The case we make is that over-prescription in the technical form of the curriculum has the effect of constraining teacher professionalism and eventually deskilling teachers, and that as a consequence less equitable educational outcomes ensue"* (p. 7).

They also state that a curriculum's technical form can be at odds with its content or stated intentions. Even though Luke and colleagues do not offer a single definition of equity, their work on the technical form of the curriculum is highly relevant to it. As shown in the extract above, they draw on existing research to suggest that teacher professional capacity is fundamental to achieving a differentiated curriculum which can meet individual needs - going on to say:

> *"According to Darling-Hammond and Bransford (2005) […] adaptive professionalism entails the capacity to modify curriculum and generate new*

> *curriculum in relation to student cohort variables, and changing contexts and demands of knowledge fields".*

This description of teacher adaptive professionalism appears to align strongly with equity defined as equitable individualisation. However, Luke and colleagues (2012) go on to note that certain contemporary curriculum policy trends can militate against this approach - in particular the increased specification of curriculum content, and the monitoring of curriculum through high-stakes assessment. In education systems with curricula which display this technical form, equity is less likely to be achieved. Therefore, it is possible for a curriculum's publicly facing intentions about equity to be at odds with the ways in which its technical form may support or inhibit equitable individualisation. The specific dimension of a curriculum's technical form that Luke and colleagues suggest can act against equity is its approach to curriculum regulation. Nieveen and Kuiper (2012, p. 359) define two main kinds of curriculum regulation - "input regulation" and "output regulation".

> *"'Curriculum regulation' reflects a government's intention to prescribe the high-fidelity implementation of directives at the input level (goals and contents, in terms of 'goals to attain') and at the output level (modes of assessments and examinations). […] On the other hand, 'curriculum deregulation' reflects a government's intention to refrain from prescription and control at the input and output level by stimulating school-based decision-making 'through soft tools and systems' […]."*

Therefore, curricula with a technical form that involves strong input and output regulation are less likely to permit teacher adaptive professionalism, and hence to realise the principle of equity. I will now use the concepts of a curriculum's technical form, input regulation and output regulation to inform a discussion of curriculum policy trends over the past 40 years - before considering what these trends may mean for equity.

3.4 UK curriculum reform of the 1980s and 1990s

A brief overview of curriculum policy since the late 1980s is helpful to contextualise more recent changes. National or state-level curricula have existed since the 19th century in continental Europe, particularly in Scandinavia and Germany (Aasen, 2003; Karseth & Sivesind, 2010; Pierson, 1998; Westbury et al., 2016). However, many countries which had never had a national curriculum began to develop one in the 1980s and 1990s (Westbury et al., 2016). The UK Conservative government introduced a mandatory National Curriculum for England and Wales in 1988 (Greany & Waterhouse, 2016). This

National Curriculum also influenced the slightly later development of the 5-14 curriculum in Scotland, although some of the features of 5-14 were mediated through Scottish policymaking processes (Arnott, 2011; Munn, 1995). I will discuss Scotland's 5-14 curriculum in more detail in chapter 4.

UK government involvement in curriculum policy stood in sharp contrast to the earlier post-war period, in which there had been far greater scope for schools and teachers to make curriculum (Ball, 2003). This shift in approach was prompted by Conservative policymakers' concerns that a lack of national oversight of the curriculum had led to too much variation in children and young people's educational experiences (Higham & Yeomans, 2007; Oates, 2011). In addition, Conservative politicians had been influenced by public choice theory from the United States, which argued that state services tended to favour the interests of those delivering them, such as teachers, rather than service users, such as children (Pierson, 1998). Senior politicians were also concerned about a so-called progressive "1960s ethos" among groups such as teacher unions and school inspectors (Lawton, 1994; Pierson, 1998). There were debates within the UK Conservative Party in the 1980s about the purpose of education (Lawton, 2012). Lawton (2012) labelled the two opposing camps in these debates as "industrial trainers" and "old humanists". The former camp emphasised the importance of the curriculum in developing young people's work-related skills, such as in information technology (Moore & Young, 2010; Pierson, 1998). Those who supported this position were focused on increasing the UK's economic competitiveness (Pierson, 1998). The latter camp emphasised the value of a body of inherited knowledge to national identity and citizenship (Lawton, 2012).

The final form of the resulting National Curriculum in England reflected these policy concerns and debates. It addressed policymakers' concerns about variability and 'standards' by incorporating a highly detailed specification of curriculum content (Gillies, 2013; Humes & Priestley, 2021; Lawton, 2012; Leat, 2014; Munn, 1995; Pierson, 1998). It claimed to be establishing a minimum curriculum entitlement for all children, with schools able to contextualise their own curriculum within this framework (Greany & Waterhouse, 2016). Therefore, its technical form contained a high level of input regulation (Luke et al., 2012; Nieveen & Kuiper, 2012). The English National Curriculum's detailed specification of content reflected the concerns of Lawton's (2012) "old humanists". However, it also addressed the concerns of the "industrial trainers" by

incorporating subjects such as design and technology and information technology (Lawton, 2012; Pierson, 1998).

The technical form of the 1988 English National Curriculum also introduced highly prescriptive output regulation - in particular national testing and the public reporting of monitoring data (Arnott, 2011; Ball et al., 2012; Luke et al., 2012; Nieveen & Kuiper, 2012). Such uses of performance data were strongly aligned to an underlying neoliberal philosophy which emphasised competition and choice in educational provision - with data becoming an important means of informing such choice (Leat, 2014). For instance, there was a belief that data about school performance would enable parents to choose between schools, therefore improving 'standards' over time and addressing concerns about "producer capture" of the education system (Pierson, 1998). Lawton (2012) notes that the introduction of national testing was also a means of making the centralising aspects of the National Curriculum more palatable to Conservative politicians who favoured reductions in the role of the state. Ball (2003) - extending a concept originally developed by Lyotard (1984) - has labelled this increased emphasis on performance monitoring within education policy as "performativity". Lyotard's (1984) original concept of performativity focused on the development of a culture within higher education which emphasised the efficient transmission and use of knowledge, especially to meet economic goals (Munday, 2018). Informed by Lyotard's work, Ball (2003, p. 216) defines performativity as follows:

> *"Performativity is a technology, a culture and a mode of regulation that employs judgements, comparisons and displays as means of incentive, control, attrition and change - based on rewards and sanctions (both material and symbolic)."*

Ball (2003) draws attention to the ways in which performativity changes how individual teachers perceive their role and their relationships with each other, and with children and young people. Many educational and curriculum researchers have continued to explore the ongoing impact of performativity on social practices within education (e.g. Ozga, 2016; Singh, 2017).

Policymakers claimed that the blend of input and output regulation within the National Curriculum would support improved educational experiences and outcomes for all children and young people (Hart, 1996). However, curriculum researchers have subsequently identified several problems with enacting curricula which follow the

National Curriculum's tight specification of input and output regulation - including on social justice grounds. In relation to input regulation, too much detailed curriculum content can lead to a lack of time to facilitate deeper learning and engagement (Lingard & Keddie, 2013). It can also lead to a static curriculum which is difficult to adapt in line with children's varying needs and interests or wider social and cultural changes (Luke et al., 2012; Timberlake et al., 2017). In relation to output regulation, the strong accountability measures which accompanied the English National Curriculum meant that the policy aim of schools contextualising their own curriculum was not achieved (Greany & Waterhouse, 2016).

I find it helpful to consider the English National Curriculum of 1988 in detail here, as several of its elements have subsequently been seen in other countries. For instance, its approaches to national testing and performance data have influenced subsequent policy developments in Australia (Lingard, 2010). Although not driven forward centrally, this trend towards increased harmonisation and specification of curriculum content was also seen within the United States (Halpin & Troyna, 1995). However, subsequent curriculum policy has also displayed several important differences with the English model. I will now move on to discuss the literature on these later trends in curriculum policymaking. As noted above, I will also link this literature to the specific context of Scotland in chapter 4.

3.5 The new curriculum frameworks of the 1990s and 2000s

3.5.1 Drivers of the new curriculum frameworks

In the 1990s and 2000s several countries produced national curricula which had a very different technical form (Luke et al., 2012) from the English National Curriculum of 1988. To explain the emergence of these "new curriculum" frameworks (Priestley, 2011), it is necessary to consider several contemporary economic, political and governance trends. Turning first to economics, new ideas about national curricula were influenced by economic changes which had been in train since the 1970s. These changes included an increase in the number of jobs focused on services and fast-changing consumer goods (Harvey, 1989). Developed countries began to outsource existing industrial sector jobs to lower wage countries. As a result, more jobs in developed countries required cognitive or advanced technological skills (Baker, 2009). In response to this trend, policymakers

began to suggest that education systems should strive to create "knowledge workers" who could support these growing sectors of the economy (Giddens, 2000; Harvey, 1989; McPhail & Rata, 2016).

In relation to politics and governance, the 1990s saw the emergence of 'Third Way' political parties in Europe and in the United States. These parties aimed to achieve electoral success by reaching an accommodation with the neoliberal policies introduced during the 1980s, while ameliorating their negative impacts on individuals and communities (Blair & Schroder, 1998). In line with this aim, governments maintained the focus on choice, flexibility and diversity in public service delivery that had been evident since the 1980s (Arnottt, 2011; Grek & Ozga, 2009; Higham & Yeomans, 2007). These had been part of the "New Public Management" approach to public service delivery developed in the 1980s (Midwinter & McGarvey, 2001). New Public Management emphasised the "decentralization of service delivery, competition and choice and performance assessment" (Midwinter & McGarvey, 2001, p. 827). However, in the 1990s governments, including those in the UK, intensified their focus on state regulation and performance management, including through establishing new performance measures and targets for public organisations (Midwinter & McGarvey, 2001).

3.5.2 Characteristics of the new curriculum frameworks

Largely in response to the economic drivers associated with globalisation, international organisations began to emphasise the need for education systems to develop "21st century learners" (Ball, 2013; Deng, 2015; McPhail & Rata, 2016; Wahlström, 2014). For instance, the UNESCO publication *Learning: The Treasure Within* (Delors, 1996) highlighted the need for education systems to respond to globalisation and prioritise lifelong learning, and the links between education and work (Tawil & Cougoureux, 2013). Alongside content knowledge, UNESCO also emphasised the importance of spiritual, moral, and social skills (Tawil & Cougoureux, 2013). This kind of thinking had implications for curriculum policy. The aim that the curriculum would contribute to national economic competitiveness persisted from the 1980s. However, national economic success was now seen to lie in individual mastery of a broader set of skills and competences, rather than in mastery of a defined set of content knowledge, such as that emphasised by the "old humanists" in the 1980s (Ball, 1990; Wrigley, 2018). Zapp (2019) has noted that international organisations did not offer a clear or consistent definition of

competencies, while still recommending that education policy should develop an often-bewildering variety of these (e.g. self-confidence, self-esteem, critical thinking, and social responsibility). As well as competencies, policymakers increasingly subscribed to a view that knowledge was dynamic and situated, and that the curriculum should enable learners to create knowledge for themselves (McPhail & Rata, 2016).

These international influences led to changes in the form of curriculum policy - with a specific curriculum type emerging in countries such as Finland, England, Singapore, and New Zealand (Poulton, 2020). Although they retained some universal statements of curriculum goals, or content to be covered, these countries introduced curricula with a technical form which emphasised input deregulation (Leat, 2014; Luke et al., 2012; Nieveen & Kuiper, 2012; Priestley, 2011; Sinnema & Aitken, 2013; Sinnema et al., 2020). To illustrate this trend, Rosenmund (2006, pp. 174-5) analysed statements of educational policy submitted to the International Bureau of Education by 100 countries in 2001 and highlighted that one key theme was:

> *"[…] an interesting tendency to explain the need for curriculum reform in terms of a change in the relationship between individual learners and educational content. While a few decades ago the idea of a canon of knowledge to be acquired by all students of a given grade was prevalent, now the selection and organization of educational content should instead provide an opportunity for self-directed learners to construct knowledge according to their individual needs and interests".*

In line with this policy belief, content knowledge in national curricula was supplemented by statements of generic competencies, skills, or learner dispositions, which were often linked to later employment (Deng, 2021; Luke et al., 2012; Lundgren, 2015; McPhail & Rata, 2016; Priestley, 2011; Sinnema & Aitken, 2013; Wheelahan, 2015). Such curricula often emphasised that skills and competencies learned in school would allow children and young people to engage in "lifelong learning" (Sinnema & Aitken, 2013).

However, although these curricula reduced the specification of content knowledge, their technical form tended to retain the systems of output regulation which had been established in the 1980s and 1990s (Ball, 2003; Leat, 2014; Luke et al., 2012). As well as the original justification for these systems - to allow schools to be compared - the continued emphasis on output regulation was also increasingly justified by the need to monitor socio-economic differentials in attainment (Nieveen & Kuiper, 2012). Therefore, these new curriculum frameworks represented a hybrid model - combining reduced input

regulation with continued output regulation (Priestley, 2011). Previous systems of output regulation had tended to have a national focus. However, output regulation for these new curriculum frameworks has also been supplemented by the increased use of data from international benchmarking studies. Lingard (2021) highlights the increased importance of what he terms "International Large-Scale Assessments" (ILSAs). ILSAs include the OECD's Programme for International Student Assessment (PISA), as well as the assessments of mathematics and literacy run by the International Association for the Evaluation of Educational Achievement. Lingard (2021) highlights that ILSAs have influenced national policy on curriculum content, with, for instance, an increased emphasis on literacy, numeracy, and systems of output regulation such as national testing.

3.5.3 Critiques of the new curriculum frameworks - output regulation and "learnification"

The new curriculum frameworks often aimed to be more engaging for learners than previous curricula that had emphasised content knowledge (McPhail & Rata, 2016; Priestley, 2011). One means of supporting this was to encourage teachers to adapt the curriculum to take account of more localised contexts. As a result, policy increasingly sought to shift teachers into the role of curriculum developers (Biesta et al., 2015; Reeves, 2008). The new curriculum frameworks also had a stronger emphasis on pedagogical approaches than their predecessors, which had typically not dealt with these in any detail (Lingard, 2007; Oates, 2010; Priestley, 2011). Sinnema and Aitken (2013) note that recent curriculum frameworks have had a stronger focus on how content is taught. These curricula often emphasised pedagogical approaches such as practical activities, problem solving, and inquiry-based learning (Sinnema & Aitken, 2013). Policymakers have often emphasised that these elements of the new curriculum frameworks would allow content to be tailored to children's and young people's individual interests (Deng, 2021; McPhail & Rata, 2016; Sinnema & Aitken, 2013). These claims often had a social justice dimension - with policymakers arguing that more locally and individually responsive curricula would particularly benefit children and young people from marginalised groups or disadvantaged backgrounds (McPhail & Rata, 2016; Nieveen & Kuiper, 2012; Sinnema & Aitken, 2013).

However, despite these claimed benefits, researchers have identified several practical problems with the operation of the new curriculum frameworks. They have highlighted

that the continued use, and often intensification, of curriculum output regulation has tended to negate the intended positive benefits of input deregulation (Sinnema et al., 2020). Researchers have contended that, rather than allowing teachers scope for increased curriculum making, mechanisms such as national testing or the performative use of exam results have led to teachers becoming risk averse, or the curriculum narrowing (Au, 2007; Halpin et al., 2010; Leat, 2014; Lingard & Keddie, 2013; Luke et al., 2012; Priestley et al., 2015; Reeves, 2008). Researchers have also suggested that these pressures are likely to be particularly acute for schools with higher concentrations of children from marginalised or disadvantaged groups, due to the risks these schools may perceive in departing from established curriculum practices (Halpin et al., 2010; Yates, 2013). Au (2007) has highlighted that high-stakes testing regimes tend to lead to the narrowing of the curriculum to the tested knowledge, or the fragmentation of the curriculum into packages of knowledge that relate strongly to the test. Such research has also shown that, in contexts where government-established performance targets are in operation, these tend to trump other considerations (Halpin et al., 2010). In addition, some countries, such as England and Australia, have seen an increased emphasis on the use of certain required pedagogical approaches - for instance to support literacy teaching (Lingard & Mills, 2007; Marsh, 2007). Au (2007) notes that this is another characteristic of high-stakes testing regimes, where teachers tend to rely on direct instruction to ensure they effectively cover the knowledge required for the test. This has also limited the space that teachers have for curriculum making (Lingard & Mills, 2007).

Lingard and Keddie (2013) have shown that differentiation of curriculum and pedagogy requires strong support for teachers, as it does not tend to occur automatically when input regulation is removed. Biesta (2005) has also argued against the new curriculum frameworks' focus on learning, particularly in relation to the kinds of recommended pedagogical approaches they recommend. He suggests that a new language of learning - "learnification" - has displaced a focus on education and teaching in these curriculum frameworks. Biesta (2005) argues that this reframing of education as learning represents a marketized relationship between consumers and producers of "learning", which serves to displace the professionalism of teachers - one of the supposed goals of the new curriculum frameworks (Priestley, 2011).

3.5.4 Critiques of the new curriculum frameworks - social realism

Another set of critiques of the new curriculum frameworks relates to their treatment of curriculum content knowledge. As noted above, these curricula tended to reduce the central specification of knowledge. A group of educational sociologists, including Michael Young, have developed a social realist critique of curricula which adopt this approach. Social realism has its roots in the work of Émile Durkheim and Basil Bernstein. These theorists distinguished between everyday knowledge and disciplinary or epistemic knowledge (Muller, 2000; Rata, 2016; Wheelahan 2006). Both types of knowledge have a social character, as all knowledge is developed in social contexts (Rata, 2016). However, social realists contend that knowledge developed within the academic disciplines can be used to explain the world in ways which everyday knowledge cannot - thus becoming more socially powerful (Maton & Moore, 2010; Wheelahan, 2006). Therefore, social realists emphasise the need to recognise these social uses and benefits of disciplinary knowledge (Hoadley et al., 2019). Initially, social realist thinkers critiqued the impact of constructivist theories of knowledge on the curriculum. Constructivist theories of knowledge influenced the "new sociology" of education which developed in the early 1970s (Shain & Ozga, 2001). This movement explored the ways in which the education system was itself implicated in mirroring and reproducing existing socio-economic and other inequalities (Shain & Ozga, 2001). In relation to the curriculum, the "new sociology" of education initially focused on exploring bias or omissions in curriculum content (Young, 2008). However social realist thinkers have suggested that it then went on to influence curriculum making practices that emphasised everyday knowledge at the expense of disciplinary knowledge. The social realists' more recent work has also moved on to critique the treatment of knowledge within the new curriculum frameworks (e.g. Wheelahan 2015).

Social realist researchers have developed two core concepts: "knowledge of the powerful" and "powerful knowledge" (Young, 2008).

> **Knowledge of the powerful** refers to the knowledge validated by groups who possess power in society (Beck, 2013). This includes knowledge which allows individuals to critique and challenge current power arrangements (Alderson, 2020).

> **Powerful knowledge** is defined as knowledge developed within the academic disciplines, which social realists claim helps to move individuals beyond their everyday experiences (Beck, 2013; Rata, 2016). It is also knowledge which individuals require to progress to higher levels of education, which tend to lead to high status careers and more valued social positions (Singh, 2002).

From a social justice perspective, social realist thinkers claim that accessing conceptual, disciplinary knowledge is particularly important for children from marginalised or disadvantaged groups because, for these children, schools may be their only chance to acquire such knowledge (McPhail & Rata, 2016; Muller & Taylor, 2000; Rata, 2016; Young, 2008; Wheelahan, 2015). For instance, Wheelahan (2015) has critiqued approaches to vocational education in Australia where knowledge is organised around "fields of practice", which serves to exclude students from disciplinary knowledge.

Social realism has not been universally accepted within the curriculum literature. There are several live debates about its implications for curriculum making. One debate centres on what starting point teachers should select when attempting to engage children and young people with the complex, disciplinary knowledge that social realists emphasise. This issue is particularly important as knowledge developed within academic disciplines is often abstract and difficult to understand for those who are new to the discipline (Beck 2013). McPhail and Rata (2016) and Rata (2016) suggest that teachers should start with disciplinary concepts, and then relate these back to children's and young people's everyday knowledge and understandings. Smith and Jackson (2021) have termed this as the "traditional" interpretation of social realism. They contrast this with a more recent "radical" interpretation of social realism, in which it is important for teachers to begin with children's existing knowledge and then make links across to disciplinary concepts. This latter interpretation of social realism is also reflected elsewhere within the literature (e.g. Alderson, 2020; Edwards, 2014; Lingard & Keddie, 2013; Wrigley, 2018). For instance, Alderson (2020) and Wrigley (2018) have critiqued a sharp divide between everyday and disciplinary knowledge in some of the earlier social realist work, suggesting that everyday knowledge can also be socially powerful, and can also assist children and young people who are engaging with disciplinary knowledge.

Recent critiques of social realism have also explored the relationship between academic disciplines and the school curriculum. Curriculum researchers have highlighted that

school subjects are not the same as academic disciplines (Deng, 2021; Frank et al., 2022; Wrigley, 2018). For instance, Deng (2015; 2021) has highlighted that, while disciplinary knowledge is an important element of education, teachers do not tend to start with 'pure' disciplinary knowledge in the classroom, but with recontextualised curriculum knowledge. In addition, White (2012) has pointed out that not all elements of school subjects - such as modern foreign languages or English literature - can be considered as disciplines, and therefore suggests that powerful knowledge may be more helpfully applied to subjects such as mathematics or science. Wrigley (2018) has also critiqued the reliance on academic communities as the guarantors of knowledge, highlighting various biased views which academic communities have held in the past. Building on these critiques, recent work (e.g. Deng, 2021) has re-emphasised that disciplinary knowledge is 'powerful' because of the ways of thinking or inquiry that are embedded in the academic disciplines, not only because of the content knowledge that they contain. As these ways of thinking or inquiry often require the development of skills as well as knowledge, Deng has suggested that the distinction between competence-based and knowledge-based approaches to curriculum are not as sharply defined as some social realist thinkers have suggested. Frank and colleagues (2022) have noted the value of the European *Didaktik* tradition, which emphasises that teachers have a fundamental role to play in selecting curriculum knowledge and judging how best to communicate it. This teacher-focused curriculum making tradition appears to have much in common with the concept of 'Equity 2' discussed in the previous chapter.

3.5.5 A return to input regulation?

Recently, curriculum researchers have highlighted that policy in some countries appears to be shifting back towards increased input regulation. This trend has been apparent in England and Sweden (Alvunger et al., 2021; Greany & Waterhouse, 2016). Nieveen and Kuiper (2012) have noted that such "pendulum swings" in policy can be swift. For instance, in England, the Conservative-led coalition government elected in 2010 introduced curriculum reforms leading to the introduction of a subject-based curriculum. This policy development appears to have drawn selectively on the academic debates initiated by social realist thinkers. England then established a new National Curriculum in 2014, which sought to benchmark itself against "high performing" countries (Greany & Waterhouse, 2016). However, recent research has indicated that this Curriculum is

overloaded with content and is not well aligned to children's and young people's development (Cain & Chapman, 2014; Hoadley et al., 2019; Winter, 2017; Wrigley, 2018; Young, 2015). It also took relatively little account of the 21st century skills agenda (Greany & Waterhouse, 2016) which had dominated curriculum policymaking earlier in the century. This English example reflects a wider trend in curriculum policy which combines a renewed emphasis on input regulation (often expressed as 'standards' or detailed knowledge requirements) alongside strong systems of output regulation (Sundberg, 2022).

3.6 Discussion

Recapping the discussion in chapter 2, Table 1 below summarises the five elements of 'educational equity' and their main underpinning principle of distributive justice (equity or equality).

Table 1: Five framings of the policy concept of educational 'equity'

Framing of educational 'equity'	'Equity' defined as…	Main underpinning principle of distributive justice
Equity 1	Access and opportunities	Equality (of access or opportunity)
Equity 2	Differentiation based on individual needs and characteristics	Equity
Equity 3	A minimum level of performance for all	Equality (of outcome)
Equity 4	(More) equal outcomes at group or individual level	Equality (of outcome)
Equity 5	Attainment gaps and measured performance	Neither principle has a necessary relationship with 'Equity 5'

Table 1 provides a reminder of my claim from the previous chapter that 'Equity 2' is the only framing with a clear link to the core principle of equity. If this is the case, then it is unlikely that macro curriculum policy could specify in detail how equity could be realised. However, macro curriculum policy could explicitly signal the importance of equity in other ways. For instance, it could:

- define equity;
- clarify how different elements of the curriculum could support individualisation;
- clarify what the appropriate grounds for differentiation were; and

- clarify how differentiation related to the curriculum's wider goals, values, or purposes (Biesta, 2005).

By drawing on the work of Luke and colleagues (2012), chapter 3 has highlighted that, aside from such an explicit emphasis on equity, curricula which allow for adaptive professionalism by teachers are more likely to allow 'Equity 2' to be realised (although this is not the only factor which could support 'Equity 2'). I have suggested that the technical form of the curriculum can have an important influence on the extent to which 'Equity 2' can be realised. I have also suggested that two dimensions of the curriculum's technical form create space for such adaptive professionalism - its approach to input and output regulation (Nieveen & Kuiper, 2012). I have also highlighted that the technical form of the curriculum and its stated intentions are not necessarily the same. Therefore, even if a curriculum made a strong commitment to 'equity', highly prescribed input and output regulation would likely inhibit the extent to which this principle could be realised.

I have shown that curriculum regulation in many countries has displayed at least two clear "pendulum swings" over the last 40 years (Luke at al., 2012; Nieveen & Kuiper, 2012). The first, typified by the UK National Curriculum of 1988, was characterised by strong input and output regulation. These curricula are likely to have provided limited scope for 'Equity 2'. The second, exemplified by the new curriculum frameworks of the 1990s and 2000s, reduced input regulation but retained, and intensified, output regulation (Priestley, 2011). The move to input deregulation may have provided more scope for 'Equity 2', but the continued existence of output regulation may have inhibited the extent to which it could be realised. In addition, social realist and other authors, such as Biesta (2005), have highlighted that there may be dangers in a straightforward assumption that 'equity' defined as curriculum differentiation is always positive for children and young people living in poverty - due to the risk of important knowledge being downplayed. A potential third pendulum swing in some countries, as seen in England and Sweden, has sought to increase input regulation.

Linking back to the dimensions of 'educational equity' set out in Table 1 above, curricula with strong input regulation, such as the English National Curriculum of 1988, appear to embody 'Equity 1'. Such curricula focused on access to curriculum content, driven by policymakers' concerns about the variability of educational experiences and economic competitiveness. These curricula also had strong systems of output regulation, which

have closer conceptual links with ‘Equity 5’. This chapter has suggested that curricula which combine strong input and output regulation are less likely to facilitate meso, micro, or nano curriculum making (Priestley et al., 2021). This in turn limits the extent to which they are likely to support the kind of differentiated approaches implied by ‘Equity 2’.

The new curriculum frameworks of the 1990s and 2000s can also be considered alongside the different dimensions of ‘educational equity’. From this perspective, these curricula could then be seen as an attempt to combine the principles of equality and equity. Firstly, they retained a focus on ‘Equity 1’, as these curricula still contained high-level statements of curriculum goals or content for all children and young people. However, these were combined with input deregulation. Policymakers often presented this feature of the new curriculum frameworks as a way of increasing the scope for meso, micro, and nano curriculum making. Input deregulation can therefore be linked to ‘Equity 2’s’ focus on differentiation - although it is not the only factor which could support equity as individualisation. For instance, Lingard and Keddie (2013) point out that realising ‘Equity 2’ is likely to require strong support for teachers as curriculum makers. However, this chapter has also highlighted that curriculum researchers have expressed concerns about the ways in which high-stakes accountability regimes are likely to militate against these kinds of practices. Therefore, the new curriculum frameworks may have contained an inbuilt inconsistency between a stated policy commitment to ‘Equity 2’ and a continued policy emphasis on ‘Equity 5’. In addition, the claims of social realist theorists that the new curriculum frameworks inhibited equal access to powerful bodies of curriculum knowledge could be read as an ‘Equity 1’ critique. Related to this point, the more recent trend observed in some countries towards increased input regulation could then be seen as a further conceptual ‘pendulum swing’ towards ‘Equity 1’.

This discussion has suggested that the relationship between the curriculum and the concept of equity is not straightforward or unchanging. Using the five elements of ‘educational equity’ as lenses to consider the curriculum policy literature has helped to illustrate the ways in which the technical form of the curriculum can support or inhibit equitable curriculum making. This discussion has also helped to highlight that the existing literature on curriculum regulation can be effectively linked to a more conceptual analysis, as well as being used to describe changes in curriculum governance. This is important because, as noted by Gewirtz and Cribb (2002), if different understandings of

social justice are not clearly defined, tensions between them can quickly become apparent. The inconsistency described in this section between ‘Equity 2’ and ‘Equity 5’ appears to be one example of these kinds of tensions. This discussion has also provided a helpful set of analytical lenses with which to consider Scottish curriculum policy, which is the main goal of chapter 4.

3.7 Conclusion

This chapter has highlighted that the curriculum policy literature has not drawn heavily on the principle of equity. In fact, curriculum researchers have more frequently drawn on social justice perspectives from the work of Sen, Nussbaum, and Fraser, which focus on capabilities, recognition, and participation. These theorists have sought to move beyond principles of distributive justice such as equity and equality. When curriculum policy researchers have used the term ‘equity’ in their work, they have not done so in a consistent or precise way.

As a result, in this chapter I sought to make links between equity and curriculum policy by using the concept of a curriculum’s technical form - operationalised by its approach to curriculum regulation. Using these concepts, I considered the literature on macro curriculum policy, identifying several ‘pendulum swings’ between different approaches to curriculum regulation since the 1980s. The literature considered in this chapter has suggested that performativity is likely to work against equitable individualisation of the curriculum at other sites of curriculum making activity. Therefore, the technical form of the curriculum has strong implications for the extent to which equity can be realised. However, the literature also poses important questions about whether curriculum input deregulation always benefits all children.

By considering and synthesising the literature on equity and curriculum policy, chapters 2 and 3 have provided a helpful framework to consider Scotland’s Curriculum for Excellence in more detail, which is now my focus in chapter 4.

Chapter 4 - Policy review: Curriculum for Excellence

4.1 Introduction

Chapter 4 contains two parts. In the first, I describe how Curriculum for Excellence (CfE) policy developed over time and consider whether it has referred explicitly to social justice or the principle of equity. I organise this information about CfE in sections which correspond to the terms of the Scottish Parliament between 1999 and 2021. This structure helps me to identify the timing and origin of several features of CfE policy. In the second part of the chapter, I take a more critical perspective. I explore what changes to CfE policy over time may mean for the extent to which it reflected the principle of equity. To support this discussion, I draw on the policy concept of 'educational equity' outlined in chapter 2, and the literature on the technical form of the curriculum and curriculum regulation from chapter 3.

4.2 Curriculum policy prior to Curriculum for Excellence

In 1999 a new Scottish Parliament reconvened for the first time since 1707, following a referendum on whether it should be established the previous year. At this point, the curriculum for children and young people was made up of three different policy frameworks that had developed incrementally over the previous decades: the Curriculum Framework 3-5; the 5-14 curriculum; and National Qualifications.

Firstly, the Curriculum Framework 3-5 was the most recent of these three curriculum policy frameworks - having been introduced by the Scottish Executive itself in 1999 (Grogan & Martlew, 2013). It contained learning outcomes in several different areas - such as "Knowledge and Understanding of the World". The guidance also had a strong focus on play and was aligned to evidence about young children's learning.

Secondly, curriculum policy for primary schools, and the first two years of secondary school, was known as 5-14. In chapter 3, I briefly made links between the 5-14 curriculum and the National Curriculum for England and Wales that the UK Conservative Government introduced in 1988. 5-14, which was introduced in 1991, was strongly influenced by this earlier curriculum development. Like the National Curriculum, 5-14 increased the prescription of curriculum content and teaching methods, as well as setting out fixed time allocations for each curriculum area (Gillies, 2013; Priestley, 2013). It also

contained learning outcomes organised into sequential levels (Priestley, 2013). As part of the introduction of 5-14, the UK Government, acting through the Scottish Office, had intended to establish a programme of national testing in language (English or Gaelic) and mathematics for the first time in Scotland (although a national monitoring programme using sample surveys had been in place since the early 1980s) (Munn, 1995; Spencer, 2013). As I noted in chapter 3, the UK Government intended that national testing in England and Wales would provide performance information for parents - as part of the introduction of an education "marketplace" (Pierson, 1998). The national testing proposals were controversial - as competition between schools was felt to run counter to Scotland's educational culture (Arnott, 2011). Their educational benefits were also unclear (Arnott, 2011). In response, parents and teaching unions organised a campaign against the national testing proposals (Munn, 1995). As a result of this campaign, the Government agreed that teachers should decide when a child should receive a test and committed to not publishing 'league tables' of schools based on their results (Munn, 1995). However, the 5-14 national tests did become high-stakes as the data were compiled by national newspapers, local authorities, and national government (Au, 2007; Spencer, 2013).

The final element of curriculum policy in place prior to CfE was made up of courses leading to qualifications, which were undertaken by young people in their final four years of secondary school. The oldest of these qualifications were Higher courses, typically undertaken by young people in several subjects in their final two years of secondary school. Higher courses had been in place since the early 20th century (McPherson & Raab, 1988). At this time, only a minority of young people attended secondary school, and therefore Higher courses were strongly focused on the academic knowledge required for university entry.

In the third and fourth years of secondary school, the curriculum was made up of courses leading to the Standard Grade qualification. Standard Grade courses had been in place since the mid-1980s, although they reflected the outcome of a period of policy change which began a decade before. In the mid-1970s two expert committees had been established to consider the implications for curriculum and assessment of increased participation in secondary education, the introduction of comprehensive secondary schooling in the 1960s, and the raising of the school leaving age in the early 1970s

(McPherson & Raab, 1988). The Munn Committee examined the secondary curriculum, while the Dunning Committee examined assessment arrangements. The Munn Committee's report recommended a broad curriculum in the third and fourth years of secondary school, comprised of core subject areas, for all young people (Arnott, 2011; Gillies, 2013). The Dunning Committee's report recommended the introduction of a new qualification that would be more accessible to a wider range of young people than Higher courses (McPherson & Raab, 1988). McPherson and Raab (1988) highlight that the reconsideration of the secondary school curriculum in the 1970s and 1980s drew on older cultural ideas from within Scotland of curriculum breadth and accessibility (the 'Scottish myth' mentioned in chapter 1) but re-framed these ideas for an era of wider participation in education and the abolition of previous selective structures. The eventual introduction of Standard Grade reflected the recommendations of both committees. It established a system of externally certified qualifications at different levels, across a range of different curriculum areas, for all young people in their third and fourth years of secondary education (Arnott, 2011).

In the late 1990s a series of reforms entitled 'Higher Still' had attempted to create a unified system of secondary school qualifications - with Highers supplemented by Advanced Highers, to be undertaken in the final year of secondary, and 'Access' and 'Intermediate' courses put in place to follow on from Standard Grade (Gillies, 2013). These latter two courses were intended to provide progression opportunities for young people for whom Higher courses were not suitable (Gillies, 2013). Therefore, by the mid-2000s Scotland's curriculum for the upper years of secondary school was made up of courses and units at five different levels: Access; Intermediate; Standard Grade; Higher; and Advanced Higher (Scottish Executive, 2007b). These courses and units were aligned to the Scottish Credit and Qualifications Framework (SCQF), which allocates a wide range of qualifications to 12 levels from Access courses undertaken in school (level 1) to doctoral study at university (level 12), and assigns credits to each qualification (SCQF, 2022).

Having established the curriculum policy frameworks that were in place prior to CfE, I will now move on to outline the development of this new curriculum policy, as well as any apparent links to social justice or equity. As I noted in my introduction to this chapter,

the following sections correspond to successive terms of the Scottish Parliament - beginning with the 1999-2003 Parliament.

4.3 1999-2003 Parliament

Following the first Scottish Parliament elections in May 1999, a Labour/Liberal Democrat coalition formed the subsequent government, which was known as the Scottish Executive. During this parliamentary term, the Scottish Executive established a public consultation on school education. This consultation, which began in 2002, was known as the 'National Debate on Education' and focused on the purposes and delivery of education in Scotland (Scottish Executive, 2002). The Scottish Executive published a report summarising the findings of the consultation, and a Ministerial Response, in January 2003. The National Debate's findings included concerns that the 5-14 curriculum was overly prescriptive, cluttered, and lacking in coherence (Gillies, 2013). The Ministerial response committed the Scottish Executive to establishing a "single set of principles and a framework for the whole curriculum through pre-school, primary and secondary, looking forward to lifelong learning" (Scottish Executive, 2003, pp. 7-8). It also confirmed that there would be a subsequent review of the 5-14 curriculum based on the new principles and framework.

The documents published around the time of the National Debate on Education used the term 'opportunity' to refer to concerns about social justice. For instance, the Ministerial foreword of the Scottish Executive's response to the findings of the Debate pledged:

> *"I also want Scottish education to realise the potential of every child in every community; closing the* ***opportunity*** [emphasis added] *gap"* (Scottish Executive, 2003, p. 2).

This policy text later described the 'opportunity gap' in two ways. Firstly, it was framed as a situation in which some "disadvantaged" children were unable to take advantage of opportunities enjoyed by the majority. Secondly, opportunity was defined in relation to outcomes - especially for some "underperforming" young people who had low attainment in qualifications at the point of leaving secondary school. At the time, the Scottish Executive's overall strategy for poverty reduction across multiple policy areas was also called *Closing the Opportunity Gap* (McKendrick et al., 2008). Like the Ministerial response to the National Debate on Scottish Education, this strategy defined opportunity

in relation to support for those in need and in relation to improving outcomes, including educational attainment (McKendrick et al., 2008).

4.4 2003-07 Parliament

A Labour/Liberal Democrat coalition again formed the Scottish Executive following the May 2003 Scottish Parliament elections. In November 2003, the Scottish Executive established a Curriculum Review Group, with membership from central and local government, national agencies, higher and further education institutions, schools, and parent groups (Scottish Government, 2015b). In line with the Ministerial response to the National Debate in the previous Parliament, the Scottish Executive tasked the Review Group with identifying the purposes of education for children aged 3-18 and the principles for the design of the curriculum. The Review Group published *A Curriculum for Excellence* one year later, in November 2004. This document outlined several elements which have remained part of Curriculum for Excellence (CfE) policy ever since - four values, four curriculum purposes, and seven curriculum design principles.

The four values, which the Group's report stated the curriculum should seek to develop in children and young people, were wisdom, justice, compassion, and integrity (Scottish Executive, 2004a). These values were not unique to CfE but were the same as those inscribed on the Scottish Parliament's recently created mace. Secondly, the Review Group also identified four curriculum purposes - which it termed the "four capacities". These capacities aimed to ensure that all children and young people in Scotland developed as: "successful learners"; "confident individuals"; "responsible citizens"; and "effective contributors" (Scottish Executive, 2004a). Each of the four capacities was supported by a set of linked "attributes" and "capabilities". For example, Table 2 below shows the attributes and capabilities for the "successful learners" capacity.

Table 2: Attributes and capabilities of "successful learners"

Attributes	Capabilities
With: • enthusiasm and motivation for learning • determination to reach high standards of achievement • openness to new thinking and ideas	And able to: • use literacy, communication and numeracy skills • use technology for learning • think creatively and independently • learn independently and as part of a group • make reasoned evaluations • link and apply different kinds of learning in new situations

Source: OECD (2021)

These attributes and capabilities have strong parallels with the new curriculum frameworks of the 1990s and 2000s (Priestley, 2011), which I discussed in chapter 3. They align with the emphasis that such frameworks placed on generic skills and competencies (Zapp, 2019). As I noted in chapter 3, policymakers often justified such new curriculum frameworks on the grounds of changes in the economy prompted by technology and globalisation. The links between the curriculum and employability skills were clearly evident in the Review Group's report - for instance it stated that curriculum change would lead to:

> *"[…] more space in the curriculum for work in depth, and to ensure that young people develop the literacy, numeracy and other essential skills and knowledge they will need for life and work."* (Scottish Executive, 2004a)

Finally, the Review Group's report set out seven "principles for curriculum design": "challenge and enjoyment"; "breadth"; "progression"; "depth"; "personalisation and choice"; "coherence"; and "relevance". These principles were supported by short descriptors, for instance "personalisation and choice" was described as follows:

> *"The curriculum should respond to individual needs and support particular aptitudes and talents. It should give each young person increasing opportunities for exercising responsible personal choice as they move through their school career. Once they have achieved suitable levels of attainment across a wide range of areas of learning the choice should become as open as possible. There should be safeguards to ensure that choices are soundly based and lead to successful outcomes"* (Scottish Executive, 2004a, p. 14).

In relation to social justice, the Curriculum Review Group identified poverty as one of the challenges facing Scotland, which therefore required the need to reconsider

curriculum arrangements (Scottish Executive, 2004a). It also referred to the need to "close the opportunity gap" (p. 4) which, as noted in the previous section, appears to have been the Scottish Executive's preferred way of highlighting social justice considerations.

The Scottish Executive accepted the Curriculum Review Group's proposals in full (Scottish Executive, 2004b). The Ministerial response which accompanied the Review Group's report established a programme of curriculum development work - with a commitment to create a "single, coherent, Scottish curriculum 3-18" (Scottish Executive, 2004b, p. 3). This programme aimed to "declutter" the primary curriculum, improve challenge and motivation in the early years of secondary school, and pilot new skills-based qualifications. The Ministerial response also confirmed that the curriculum would be made up of statements describing the outcomes which children and young people were expected to achieve (Priestley & Humes, 2010).

Following the publication of these two documents, a Curriculum Review Programme Board led the policy development for CfE from 2004 onwards (Learning and Teaching Scotland, 2005). The Programme Board comprised civil servants, representatives from national organisations, headteachers and an academic researcher (Learning and Teaching Scotland, 2005). It reported on its work in 2006 in a document entitled *Progress and Proposals* (Scottish Executive, 2006b). This document outlined how the Programme Board had undertaken "engagement" with stakeholders over the previous two years - including at conferences and other events.

Progress and Proposals suggested that the next stages of CfE development work would focus on the curriculum covering ages three to 15 (not 14 as set out in 2004), with the document stating that "in due course, changes [*would be*] needed in the S4 to S6 curriculum, to build upon the revised S1 to S3 base" (Scottish Executive, 2006b, p. 20). To achieve this, it clarified that a review of the Curriculum Framework 3-5 and the 5-14 curriculum would be undertaken. *Progress and Proposals* also confirmed that CfE, like 5-14, would be structured into sequential levels (Priestley, 2013). It also provided more detail on the learning outcomes which would make up the new curriculum - clarifying that these would be framed as "experiences and outcomes", described from the learner's point of view, and organised into eight curriculum areas (Priestley & Humes, 2010). It proposed that these curriculum areas should be: Expressive Arts; Health and Wellbeing;

Languages; Numeracy and mathematics; Religious and moral education; Sciences; Social studies; and Technologies (Scottish Executive, 2006b).

Subsequent CfE policy was set out in stages in a series of *Building the Curriculum* documents published by the Scottish Executive. *Building the Curriculum 1* (Scottish Executive, 2006a) described the eight curriculum areas within CfE in more detail, showing how these contributed to the four capacities, offered advice on teaching approaches for each curriculum area, and suggested what the main "lines of development" would be for each one. *Building the Curriculum 2* (Scottish Executive, 2007a) focused on "active learning" in early learning and childcare settings and in the early years of primary school. There appeared to be no explicit reference to social justice in either *Progress and Proposals* or *Building the Curriculum 1*. In contrast, *Building the Curriculum 2* did refer to "early intervention" approaches to literacy and numeracy and emphasised the need to support "vulnerable children". In parallel with the publication of *Progress and Proposals* and the first *Building the Curriculum* documents, writing teams - made up of teachers seconded to Learning and Teaching Scotland - began to produce the draft experiences and outcomes in 2006 (Kidner, 2010). A Validation Group was established in early 2007 to review these drafts against the curriculum design principles developed by the Curriculum Review Group.

Alongside the development of CfE, several wider education policy changes during the 2003-07 Parliament are relevant to curriculum regulation. In 2004, alongside the Scottish Executive's response to the Curriculum Review Group, it published a wide-ranging education policy document entitled *Ambitious, Excellent Schools* (Scottish Executive, 2004c). This document committed to giving teachers and schools "more freedom" - signalling that CfE was one important means of doing this. *Ambitious, Excellent Schools* also made several policy commitments which it claimed were part of a new system of "tougher, intelligent accountabilities". Among the policy changes to achieve this goal was the replacement of both the 5-14 national tests and the existing monitoring survey - the Assessment of Achievement Programme - with a single new national monitoring survey - the Scottish Survey of Achievement (SSA) - from 2005 onwards (Spencer, 2013). However, it is important to note that, even when national prescription of standardised assessments ended in 2004, many local authorities continued to use commercially available standardised assessments to monitor attainment, which Spencer

(2013) attributes to continued national and local political pressure to provide accountability evidence. Cowie and colleagues (2007) point out that systems of performance reporting in Scottish education, originally developed in the 1990s, were refined into the 2000s. These systems focused on attainment in National Qualifications and included the setting of national targets for individual schools (Cowie et al., 2007). Therefore, accountability pressures did not disappear from 2004 onwards (Priestley, 2010).

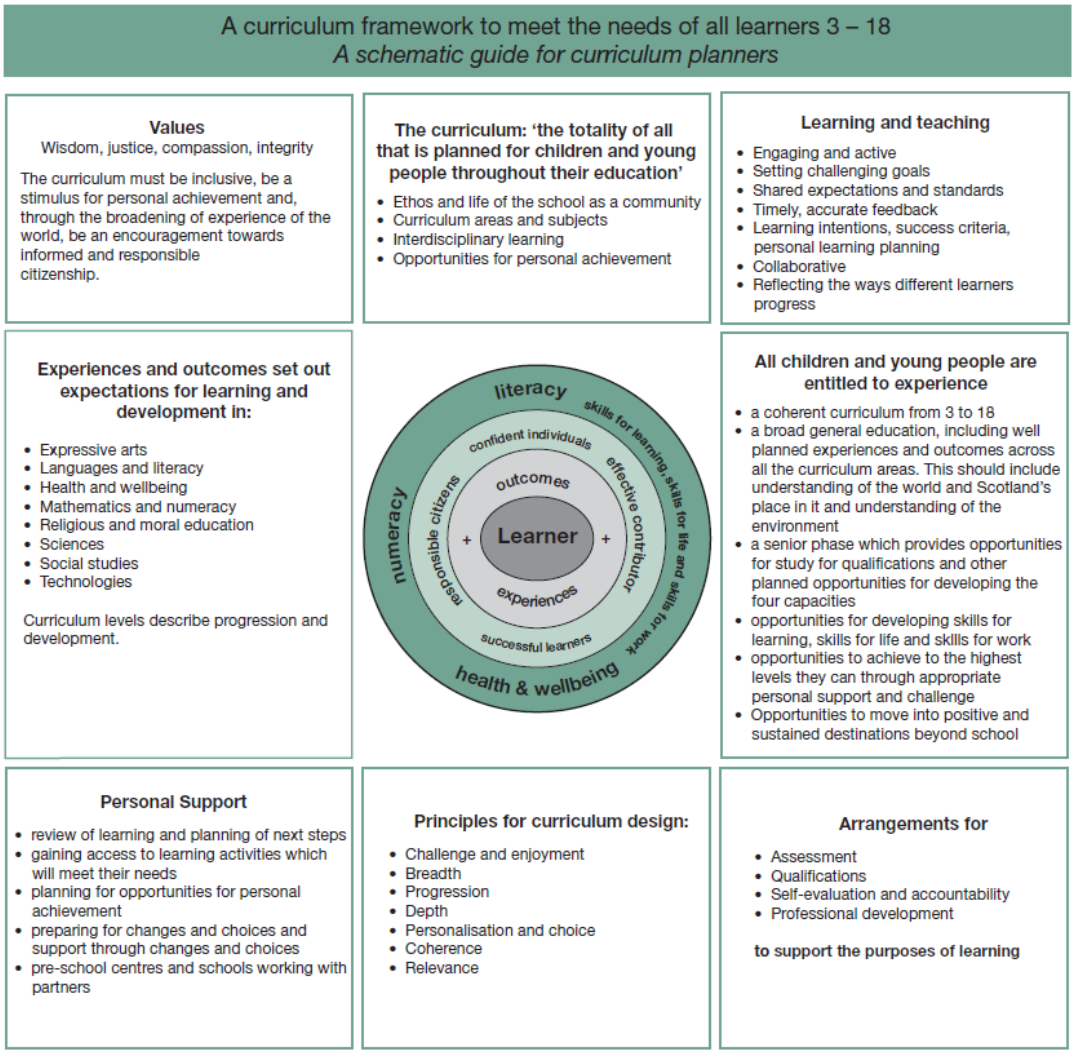
Towards the end of the 2003-07 Parliament, the Scottish Executive commissioned the OECD to undertake a review of Scotland's school education system. One of the review's objectives was to compare Scotland to other OECD countries in relation to "the quality and equity of education outcomes of Scotland" (OECD, 2007, p. 161). Its terms of reference also asked the review team to consider the adequacy of current reforms, including CfE. This appears to be the first time that the term 'equity' had been used in relation to Scottish education policy, or CfE. The process of carrying out the review began in early 2007, however it was intended that its findings would not be published until after the next Scottish Parliament election in May 2007.

4.5 2007-11 Parliament

Following the May 2007 Scottish Parliament elections, the Labour/Liberal Democrat coalition was replaced by a minority Scottish National Party (SNP) government, with Alex Salmond as First Minister. One of the first notable education policy developments in the new parliament was the publication of the findings of the OECD's (2007) review of Scottish education policy. As signalled by the review's terms of reference, its report defined 'equity' largely in relation to educational outcomes. It concluded that Scotland achieved well in the OECD's Programme for International Student Assessment (PISA), in which it had participated in its own right since 2003. However, it also suggested that there were significant variations in in-school (rather than between-school) attainment in both PISA and in National Qualifications - and that these were particularly linked to socio-economic status. The report recommended that there should be improved "lateral diversification" of the curriculum - to include more variation in content and teaching approaches - and suggested that Curriculum for Excellence (CfE) would be well placed to facilitate this.

Despite the change of government in 2007, the new 'Scottish Government' (which replaced the term 'Scottish Executive' used since 1999) continued to pursue CfE. It published three more *Building the Curriculum* documents between 2008 and 2010. The first of these, *Building the Curriculum 3*, which offered a framework for curriculum planning, was published in June 2008 (Scottish Government, 2008b). It re-stated elements of previous CfE publications, such as the curriculum design principles, the four capacities, the use of experiences and outcomes, the entitlements, and the levels. It offered more detailed explanation of some of these elements, such as the curriculum design principles. *Building the Curriculum 3* also presented a visual overview of the different elements of CfE - which is reproduced below in Figure 3.

Figure 3: Visual overview of the elements of Curriculum for Excellence, 2008



Source: Scottish Government (2008b)

Building the Curriculum 3 emphasised that schools and partners were responsible for curriculum making, within the overall framework of CfE. For instance, it referenced the recommendation made by the 2007 OECD review that "curriculum reform has to come from schools rather than waiting for central direction" (Scottish Government, 2008b, p. 3). It also had a greater emphasis on the senior years of secondary school than earlier policy documents - signalling that the Scottish Government would make changes to National Qualifications and assessment. *Building the Curriculum 3* did refer to the OECD review's findings about the link between socio-economic status and attainment, however it did not articulate in detail how CfE would address what the OECD had identified as a major challenge for the Scottish system.

The process of producing the curriculum guidance itself - in the form of the draft experiences and outcomes - also continued in the early years of the 2007-11 Parliament. Between November 2007 and May 2008, Learning and Teaching Scotland, the national curriculum development body, published the experiences and outcomes in draft form, and encouraged schools to begin trialling them (Baumfield et al., 2010). The University of Glasgow then undertook analysis of the feedback generated through this trialling process (Baumfield et al., 2010). Learning and Teaching Scotland published the final versions of the experiences and outcomes in April 2009 (Kidner, 2010). Priestley and Sinnema (2014, p. 55) describe the final format of the experiences and outcomes as follows.

> *"These follow a formulaic structure, seeking to combine within simple statements, set out in hierarchical levels, both the expected outcomes of learning and the experiences through which the outcomes might be achieved".*

To give an indication of their format, Table 3 below provides an example of the experiences and outcomes relating to "People in society, economy and business" from the Social Studies curriculum area.

Table 3: Example of experiences and outcomes - Social studies

CfE level	Experiences and outcomes
Early (Age 3 to P1)	I am aware that different types of evidence can help me to find out about the world around me. SOC 0-15a
First (P2-P4)	I understand that evidence varies in the extent to which it can be trusted and can use this in learning about current issues in society. SOC 1-15a
Second (P5-P7)	I can use evidence selectively to research current social, political or economic issues. SOC 2-15a
Third (S1-S3)	I can use my knowledge of current social, political or economic issues to interpret evidence and present an informed view. SOC 3-15a
Fourth (S1-S3)	I can evaluate conflicting sources of evidence to sustain a line of argument. SOC 4-15a

Source: Education Scotland (2021b)

In June 2008, the Scottish Government announced that it would consult on changes to National Qualifications that would reflect the development of CfE (Scottish Government, 2008a). The consultation document proposed retaining much of the existing structure of the qualifications system - with Access, Higher and Advanced Higher courses being retained as "points of stability" - but with their content being revised to align with CfE. However, it also proposed the removal of the Standard Grade examination in middle secondary and its replacement with a new qualification - citing concerns about how well Standard Grade aligned with other elements of the qualifications system and suggesting that its original rationale as an 'exit qualification' was less valid (Scottish Government, 2008a). The Scottish Government's response to the consultation, in 2009, confirmed that these proposed changes would go ahead - with new 'National 4' and 'National 5' examinations replacing Standard Grade from 2013 onwards, and revised Higher courses in place from 2015 (Kidner, 2010).

The final two *Building the Curriculum* documents were published between 2009 and 2011. *Building the Curriculum 4* (Scottish Government, 2009) focused on skills development. *Building the Curriculum 5* was not a single document, but a collection of five documents published between January 2010 and February 2011 (with some revision of its constituent parts between these dates). Collectively, these five documents focused on assessment - covering topics such as: quality assurance and moderation; reporting; standards; achievement; and profiling. These final *Building the Curriculum* documents

(e.g. Scottish Government, 2011) appear not to have considered social justice issues in any detail.

During the 2007-11 parliament, concerns about progress with enacting CfE began to emerge. These concerns included feedback that the guidance produced to date was "vague" and that professional development activities had failed to equip teachers to enact the new curriculum (BBC, 2010a; Kidner, 2010). Secondary schools also raised concerns that they were not clear on how to design courses in the first three years of secondary school until more detail about the new National Qualifications was available (Kidner, 2010). In response to these concerns, the Scottish Government delayed the start date for CfE by one year - to August 2010 (Kidner, 2010). It also provided further financial support for CfE (Kidner, 2010). In May 2010, the Scottish Government also announced that the inspectorate would pause routine inspections and work with schools to support the implementation of CfE over the subsequent school term (BBC, 2010b). Academic research subsequently confirmed these concerns around CfE - linking them to teacher anxiety, a variable pace of change, and a mismatch between CfE's aims and the prevailing culture of accountability within Scottish school education (Priestley et al., 2014). Researchers also suggested that the prescribed nature of the 5-14 curriculum had created a generation of teachers who lacked the curriculum making skills that CfE now required (Priestley et al., 2014).

In 2009 the Scottish Government commissioned Graham Donaldson, a former head of the inspectorate, to undertake a review of teacher education. His subsequent report, *Teaching Scotland's Future,* initiated a significant programme of change in teacher education. The report made specific reference to the OECD review of Scottish education in 2007, and its findings about the impact of socio-economic status on educational outcomes (Donaldson, 2010). *Teaching Scotland's Future* also made several recommendations linked to the changes that were required to support CfE. It considered what was required to allow teachers to act as curriculum makers, in line with the intentions of CfE. The report aimed to influence a shift in the professional role of teachers, stating:

> *"The Teachers' Agreement*[4] *and the philosophy of Curriculum for Excellence embrace this much wider concept of teacher professionalism […]. This implies that teachers must be able to go well beyond recreating the best of current or past practice. It implies a teaching profession which, like other major professions, is not driven largely by external forces of change but which sees its members as prime agents in that change process"* (Donaldson, 2010, p. 14).

4.6 2011-16 Parliament

The Scottish National Party gained an overall majority of seats within the Scottish Parliament for the first time in the 2011 election. The parliamentary term which began in 2011 also saw a change in First Minister in 2014, as Nicola Sturgeon replaced Alex Salmond shortly after the referendum on Scottish independence held in the same year. Perhaps reflecting this change in political leadership, policy approaches to both Curriculum for Excellence (CfE) and social justice appear to fall into two distinct time periods, before and after 2014.

The years from 2011 to 2014 saw the consolidation of many of the actions begun in the previous parliamentary term. Education policy was heavily focused on the development and introduction, from 2014, of the new National Qualifications announced in the previous Parliament (Kidner, 2013). For CfE, Education Scotland, which had been established in 2011 as the national education improvement agency, published a large amount of further guidance, exemplification material, and briefings on the curriculum, as well as running professional development events for teachers (Kidner, 2013). However, concerns about CfE's vagueness persisted (Kidner, 2013).

The final years of the Parliament saw a period of educational policy change with implications for CfE. There were three main changes. The first was that education policy began to focus more explicitly on the link between outcomes and socio-economic status. For instance, in 2013 the education minister, Michael Russell, highlighted that addressing an "attainment gap" associated with socio-economic status was a priority for the Scottish Government (BBC, 2013). To address this, the Scottish Government and Education Scotland established the School Improvement Partnership Programme (SIPP). The SIPP ran from 2013 to 2016 and was managed by Education Scotland (Education Scotland, 2016b). It aimed to foster partnerships between schools with high concentrations of

[4] A 2001 agreement between the Scottish Executive, local authorities, and trade unions to improve pay and conditions for teachers and enhance teacher professionalism.

children and young people living in poverty, using a collaborative action research approach to implement and evaluate improvement activity (Education Scotland, 2016b).

Secondly, in February 2015, the Scottish Government announced a more ambitious new initiative which was specifically focused on improving attainment for children and young people living in poverty. The Scottish Attainment Challenge (SAC), a programme of targeted funding, aimed to improve attainment in literacy and numeracy, and promote health and wellbeing, for primary school pupils living in the most deprived areas. The SAC was influenced by other educational 'challenge' initiatives which had been introduced elsewhere in the UK since the 2000s (Kidson & Norris, 2014).

Thirdly, in September 2015, the Scottish Government published a draft *National Improvement Framework*. This set out an overall vision for Scottish education - establishing the twin policy priorities of excellence and equity (mentioned in chapter 1) for the first time. The document described these two priorities as follows.

> *"Excellence through raising attainment: ensuring that every child achieves the highest standards in literacy and numeracy and the right range of skills, qualifications and achievements to allow them to succeed.*
>
> *Achieving equity: ensuring every child has the same opportunity to succeed. The Scottish Attainment Challenge will help to focus our efforts and deliver this ambition"* (Scottish Government, 2015a, p. 4).

The *National Improvement Framework* claimed to be bringing together "key information" about different aspects of Scottish education to "evaluate performance" and inform "the action taken to improve attainment and wider outcomes for every child in Scotland" (Scottish Government, 2015a, p. 6). It suggested that this approach was based on "best practice on the use of data and intelligence to improve education". One important element of the National Improvement Framework was the introduction of a new programme of standardised assessments of literacy and numeracy for children in Primary 1, Primary 4, Primary 7, and Secondary 3 classes - replacing the existing sample-based Scottish Survey of Literacy and Numeracy (SSLN) introduced in 2011. The Scottish Government suggested that the new standardised assessments would help to inform improvement, linking them specifically to the "attainment gap" (Scottish Government, 2015a).

December 2015 saw the publication of a second OECD review - which focused on CfE as well as on 'equity'. As with the 2007 review, the 2015 review appeared to interpret 'equity' in relation to outcome measures of attainment - such as PISA assessments (OECD, 2015). Among its many recommendations, the review suggested there was a lack of data to inform policymaking and the improvement work undertaken by local authorities and schools. It suggested that the National Improvement Framework was one way to respond to this recommendation. Finally, the OECD suggested that Scotland may wish to rename CfE as "Curriculum for Excellence *and Equity*" (OECD, 2015, p. 11) to take account of its changing policy priorities.

4.7 2016-21 Parliament

Following the May 2016 Scottish Parliament elections, the Scottish National Party remained in power with Nicola Sturgeon as First Minister, although this time without an overall majority of seats. This Parliament saw the introduction of new elements of CfE policy which had not been envisaged at earlier stages of the development programme. Firstly - in June 2016 - the Scottish Government published a *Delivery Plan* for education (Scottish Government, 2016). In relation to Curriculum for Excellence (CfE), this Plan expressed an intention to make "the whole CfE framework much clearer and simpler", stating that "too many documents and too much 'guidance' have accumulated as CfE has been implemented" (Scottish Government, 2016, p. 10). The *Delivery Plan* expressed a desire to "de-clutter" CfE, echoing the language used in the earliest CfE policy documents to describe the previous 5-14 curriculum. It also announced that Education Scotland would produce "clear, practical advice" to assist teachers in assessing whether children and young people had achieved the CfE levels (Scottish Government, 2016, p. 11). By the following June, this advice had been published as a series of "Benchmarks" for each curriculum area (Education Scotland, 2021a). The Benchmarks provide statements of expected achievement aligned to the experiences and outcomes (Priestley, 2016).

Secondly, and in response to the *Delivery Plan*'s concerns about CfE's complexity, Education Scotland also produced a revised statement about the curriculum from the Chief Inspector. The Delivery Plan had stated that:

> *"The Deputy First Minister* [also the education minister] *has instructed Education Scotland to prepare and publish a clear and concise statement of the basic framework within which teachers teach"* (Scottish Government, 2016).

When published, the *Chief Inspector's Statement* introduced a new "aim" for CfE, situated in tabular format 'between' the values and the four capacities, which had not been explicitly articulated before:

> *"Curriculum for Excellence (CfE) aims to raise standards, to close the* [poverty-related] *attainment gap, and to prepare children and young people for their future"* (Education Scotland, 2016a, p. 5).

As noted in chapter 1, the *Chief Inspector's Statement* also confirmed that the two "key priorities" for CfE were now:

> *"ensuring the best possible progression in literacy, numeracy and health and wellbeing for every child and young person; and closing the attainment gap"* (Education Scotland, 2016a, p. 2).

The *Delivery Plan* and the products it generated (the Benchmarks and the *Chief Inspector's Statement*) therefore represented a much more explicit link between CfE and attainment, as well as an expectation that CfE could help to close an 'attainment gap' linked to poverty.

The standardised assessments announced in the previous Parliament were introduced in August 2017. These assessments are taken by children in Primary 1, Primary 4, Primary 7, and Secondary 3 classes in reading, writing, listening, talking and numeracy (Scottish Government, 2019a). The data from these standardised assessments are not published directly. However, national data on achievement of CfE levels have been published at a school level since 2016 (Scottish Government, 2019a). Initially, these data were informed by teacher judgements (Scottish Government, 2019a). However, since 2018 they have also been informed by the results of the standardised assessments (Scottish Government, 2018).

The next notable development in relation to CfE was the publication in 2019 of a *Refreshed Narrative* for the curriculum. This development reflected the findings of the 2015 OECD review of CfE, which had suggested that the curriculum needed a central reference point which could be updated as the policy developed over time (OECD, 2015). The *Refreshed Narrative* did not involve rewriting key elements of CfE, including

previously published policy texts (Priestley, 2019). Instead, it was intended to provide a "gateway" into a policy which, by the time of its publication, had accumulated multiple policy texts and guidance documents since its launch in 2004 (Priestley, 2019). The *Refreshed Narrative* was developed by a working group including policymakers, academics, and other stakeholders (Priestley, 2019). It consisted of an online resource setting out the key elements of CfE with links to further online information (Scotland's Curriculum, 2021). Since its publication, it has been supplemented by various "refreshed narrative resources" such as "thought papers" on curriculum innovation, examples of learning, and posters (Scotland's Curriculum, 2021). The *Refreshed Narrative*, in contrast to the *Delivery Plan* of 2015 and the *Chief Inspector's Statement* of 2016, did not make specific reference to the terms 'equity' or attainment. Its content was much more strongly focused on the elements of CfE that had been set out earlier in the development programme - including the four capacities, the entitlements, and the curriculum design principles. However, unlike earlier policy documents it had a stronger explicit emphasis on the process of curriculum making - setting out a series of considerations and prompts to support teachers to carry this out.

4.8 Discussion: Curriculum for Excellence and equity

Having outlined the chronological development of Curriculum for Excellence (CfE) policy between 2003 and 2019, I will now move on to reflect in more detail on how its development may or may not align with the concept of 'equity'. In chapter 2 I suggested that the policy concept of 'educational equity' contained five distinct framings. These were drawn from the literature and reflected different ways in which the twin principles of distributive justice - equity and equality - had been interpreted by policymakers. These are shown below in Table 4.

Table 4: The five elements of the policy concept of 'educational equity'

Element of 'educational equity'	Description - main focus	Main underpinning principle of distributive justice
Equity 1	Access and opportunities	Equality (of access and opportunity) - *Equity may help to realise*
Equity 2	Differentiation based on individual needs and characteristics	Equity
Equity 3	(More) equal outcomes at group or individual level	Equality (of outcome) - *Equity may help to realise*
Equity 4	Outcomes set as a minimum level of performance for all	Equality (of outcome) - *Equity may help to realise*
Equity 5	Attainment gaps and measured performance	Some alignment with equality of outcome, but no necessary relationship with either principle

In chapter 2 I also suggested that, informed by the literature, 'Equity 2' was the interpretation that best captured the distinctive nature of the principle of equity, which emphasises responsiveness to individual needs or circumstances. In chapter 3 I then suggested that the technical form of a curriculum (Luke et al., 2012) - in particular its approach to input and output regulation - has strong implications for the extent to which 'Equity 2' can be realised in practice (although it is not the only factor which will influence this). It is now possible to apply these insights from chapters 2 and 3 to the development of CfE policy.

Prior to CfE, the 5-14 curriculum framework had a technical form made up of both strong input and output regulation (Nieveen & Kuiper, 2012). Input regulation can be observed in 5-14's prescriptive curriculum framework and time allocations for individual curriculum areas. Output regulation within 5-14 consisted of national testing of individual children and young people, combined with the use of these data by local and national government, and the media. This technical form is likely to have constrained the space for teacher curriculum making, and hence substantive realisation of 'Equity 2' within 5-14 (Priestley, 2013).

The subsequent development of CfE policy from 2004 onwards appears to be a clear example of the kind of new curriculum frameworks of the 1990s and 2000s (Priestley, 2011) that I described in chapter 3. This can be clearly seen in elements such as CfE's reduced specification of curriculum content within the experiences and outcomes, its desire for teachers to engage in curriculum development activity, and its focus on generic skills and competencies (Priestley, 2010; Priestley, 2013; Priestley & Humes, 2010). CfE aimed to allow schools and teachers to select and develop their own curriculum content, which it was hoped would allow content to reflect local contexts and enhance teachers' autonomy and professionalism (Priestley et al., 2014). These elements of CfE policy represent an attempt to realise curriculum input deregulation (Nieveen & Kuiper, 2012). The shift towards input deregulation could be seen as providing increased 'space' for 'Equity 2'. Curriculum input deregulation within CfE does not appear to have been primarily justified on social justice grounds. Instead, the slimming down of content aimed to prepare young people for working lives where they would be required to continually acquire new knowledge (Priestley & Humes, 2010). In addition, the term 'equity' was not used - with 'opportunity' being the preferred language.

Between 2005 and 2016 there also appear to have been attempts to realise curriculum output deregulation, in particular through the move away from national testing in 2004. The development of CfE policy after 2014 appears to show a "pendulum swing" (Nieveen & Kuiper, 2012) back towards curriculum output regulation - through the introduction of the Benchmarks, the introduction of standardised national assessments, and the publication of school-level data on CfE levels. In practice, therefore, the literature considered in chapter 3 suggests that the extent to which there was scope for 'Equity 2' may have decreased after 2016 - due to the potential impact of cultures of performativity (Ball, 2003).

These recent policy changes to output regulation within CfE may have been prompted by the Scottish Government's emphasis on improving outcomes for children and young people living in poverty. In fact, it is striking that a strong focus on measured outcomes can be observed in recent Scottish curriculum policy. This suggests that Scottish policy may have also seen an increased emphasis on 'Equity 5' in recent years.

In summary, this discussion suggests that there is the potential for a mismatch between the extent to which the technical form of CfE provides space for equity as a principle of

curriculum making, and its recent explicit emphasis on ‘equity’. In Figure 4 below I summarise the discussion in this section - showing how changes in input and output regulation during the development of CfE may have affected the likely ‘space’ for curriculum making focused on equity.

Figure 4: Input and output regulation in Scottish curriculum policy, 1998-2021

Year	Government	Curriculum input regulation	Likely 'space' for curriculum differentiation ('Equity 2')	Curriculum output regulation
1998	Labour (UK)	5-14 curriculum in place - strong input regulation through prescriptive curriculum framework, time allocations for individual subjects etc.	Reduced space for curriculum differentiation?	Strong output regulation through national testing and use of these data e.g. by the media and local authorities.
1999	Labour/Liberal Democrat (Scottish Parliament)			
2000				
2001				
2002				
2003				
2004				Attempts to reduce and harmonise output regulation through the use of sample surveys to monitor attainment (Scottish Survey of Achievement 2005-11; Scottish Survey of Literacy and Numeracy 2011-16). No individual pupil level assessment on a national basis.
2005			Increased space for curriculum differentiation?	
2006				
2007	Scottish National Party (Scottish Parliament)			
2008				
2009				
2010				
2011		CfE in place - weaker input regulation through less prescriptive curriculum framework, removal of time allocations etc.		
2012				
2013				
2014				
2015				
2016				
2017			Reduced space for curriculum differentiation?	Increased output regulation through introduction of CfE Benchmarks, national standardised assessments, and the collection of individual pupil data on CfE levels.
2018				
2019				
2020				
2021				

4.9 Conclusion

In chapter 4 I have provided an overview of the complex process of developing Curriculum for Excellence (CfE) policy from 2004 onwards. Building on the literature considered in chapters 2 and 3, I have suggested that the early policy framework for CfE can be seen as an attempt to realise curriculum input and output deregulation (although at the time this does not appear to have been undertaken primarily on social justice grounds). Later policy development may represent a further 'pendulum swing' back towards tighter output regulation. These shifts in curriculum regulation are therefore likely to have had an impact on the extent to which it has been possible to realise 'Equity 2' - defined as equitable individualisation - as a principle of curriculum making. This discussion provides a point of departure for the following chapters, in which I move on to explain why and how certain kinds of empirical data were collected (chapter 5) and then to present the findings of the analysis of these data (chapters 6, 7, and 8). Chapter 9 will return to the issues raised in this chapter and, by considering them alongside this study's empirical data, will reflect in more detail about whether CfE could be considered as - in the question posed by this thesis' title - a curriculum for equity.

Chapter 5 - Methodology

5.1 Introduction

Having established the conceptual foundations for my study in the previous four chapters, in chapter 5 I outline its methodology. I begin by explaining my overall ontological and epistemological framework, Critical Realism, before showing how this informed the study's mixed-methods research design. This involved a detailed analysis of language within Curriculum for Excellence (CfE) policy texts, using computer software, and interviews with 15 policymakers. I explain in detail how I undertook both stages of data collection, as well as several ethical considerations that emerged alongside the collection of primary data. I describe how I analysed both sets of data individually, before using Margaret Archer's morphogenetic approach to re-interpret them and increase my ability to explain key cultural and structural relationships and influences. Finally, this chapter also provides me with an opportunity to explore my own role as an 'insider researcher' in more detail.

5.2 Ontological and epistemological framework

Critical Realism is a meta-theory that provides an ontological account of social reality (Danermark et al., 2002). It challenges two competing ontological positions within the social sciences. The first of these is positivism, which holds that there is an external reality which researchers can describe by demonstrating causal links between quantitative variables (O'Mahoney & Vincent, 2014). The second position is constructivism, which rejects the concept of an external reality, and argues that social research can only generate data on what individuals think or believe (Altheide & Johnson, 2011).

In contrast, Critical Realism argues that there are three levels of social reality, which make up what is known as its depth ontology (O'Mahoney & Vincent, 2014). The first level, where researchers can observe and record what people think, is known as "the empirical" (O'Mahoney & Vincent, 2014). People may not be aware of everything that has happened to cause a situation or event. Equally, there may be events they are not aware of, or they may misinterpret what has happened - either consciously or unconsciously. Critical Realism therefore moves beyond constructivism by theorising a second level of social reality, known as "the actual", which refers to real events that occur

in the world (O'Mahoney & Vincent, 2014). It is likely that no one individual will have complete awareness of events occurring at this level. Finally, Critical Realism suggests that events at the actual level are influenced by a set of underlying "mechanisms", which it describes as "the real". This final level may initially appear close to positivism's focus on measurable relationships between variables. However, Critical Realism argues that social mechanisms do not work in deterministic ways, in contrast to relationships observed within the natural sciences. This is because social reality takes place within an open system where it is impossible to account for all variables. Social mechanisms can interact in unpredictable ways, or even not be activated at all (Bhaskar, 2014; O'Mahoney & Vincent, 2014).

Mechanisms are generated by the properties of social entities, which Critical Realism theorises as possessing emergent properties. Emergence means that an entity made up of multiple parts possesses properties that are more than the sum of these parts (Elder-Vass, 2005). Social structures that bring people together - such as teams - possess emergent, causal powers, which individual members do not have (Elder-Vass, 2005). Elder-Vass (2010) suggests that there are two main kinds of emergent social structures - norm circles (norms shared by a group of people) - and organisations of various kinds. Sets of ideas that are brought together can also possess emergence by making an argument or providing an explanation that individual pieces of information do not provide (Elder-Vass, 2008).

Critical Realism aligned well with my study for two reasons. Firstly, through the study I was particularly focused on understanding policy change in relation to 'equity' within Curriculum for Excellence (CfE), or indeed the lack of such change. This focus aligned well with Critical Realism's emphasis on the ways in which existing social structures or sets of ideas influence how people act (Mutch, 2014; Smith & Elger, 2014). Secondly, Critical Realism also reminded me that the evidence generated through individual accounts, such as those given by policymakers, cannot be accepted uncritically as accounts of "real world" policy (Ozga, 2011, p. 219). This insight influenced both the design of my study, which does not just rely on policymakers' accounts, and my approach to data analysis, which aimed to use theory (primarily Margaret Archer's morphogenetic approach) to move beyond these empirical accounts.

Research studies influenced by Critical Realism aim to identify the mechanisms which have influenced their empirical data (Hoddy, 2019). As discussed above, Critical Realism

suggests that social mechanisms cannot be directly observed (Karlsson & Ackroyd, 2014). To counter this, researchers aim to collect rich data, often using different research methods. They hope that such rich data will provide a sound basis to identify potential mechanisms, when combined with insights from the literature (O'Mahoney & Vincent, 2014). Critical Realism sets out two distinctive "explanatory logics" to assist with the process of identifying potential mechanisms: "abduction" and "retroduction" (Crinson, 2001; O'Mahoney & Vincent, 2014).

Abduction "re-describes the observable everyday objects of social science […] in an abstracted and more general sense in order to describe the sequence of causation that gives rise to observed regularities in the pattern of events" (O'Mahoney & Vincent, 2014, p. 17). It involves re-describing or re-contextualising empirical data to "see something as something else" - for instance Marx's materialist recontextualisation of history (Danermark et al., 2002, p. 93). The new description will inevitably be fallible and subsequent explanations may ultimately prove to be a better fit (Danermark et al., 2002). Abduction requires creativity, imagination and, above all, "the ability to form associations" (Danermark et al., 2002, p. 93).

Retroduction involves theorising about the underlying causal mechanisms that help to explain what has been observed in empirical data (Crinson, 2007; Hoddy, 2019). Like abduction, it begins with patterns observed in empirical data but theorises in a different way about what may have led to them. Retroduction involves the researcher working 'backwards' and developing their own theoretical arguments about what may have generated patterns within their empirical data (Danermark et al., 2002). There is no universally accepted method of undertaking retroduction. Potential strategies include counterfactual thinking, studies of extreme cases, and comparative case studies (Danermark et al., 2002).

5.3 Research design

As noted in section 5.2, research studies informed by Critical Realism tend to draw on multiple sources of data, which allow researchers to theorise about potential mechanisms (Smith & Elger, 2014). Researchers influenced by Critical Realism therefore make pragmatic choices about research design, meaning they can adopt a range of potential designs to answer their specific research questions. In line with Critical Realism's focus

on multiple data sources, I adopted a mixed-methods research design (Creswell, 2008). This research design had two sequential stages. The first stage involved a detailed analysis of Curriculum for Excellence (CfE) policy texts. Critical Realist researchers often use documentary sources to explore change over time (Mutch, 2014). Time is important within Critical Realist research due to the concept of emergence. As highlighted in section 5.2, emergence relates to the ways in which structural or cultural entities develop, persist, and influence subsequent social events, and so it has a specific focus on time (Mutch, 2014). Researchers can use documentary sources, such as curriculum policy texts, "to make temporal… contrasts to inform the contrastive explanation" they aim to undertake (Mutch, 2014, p. 224).

The second stage of research involved undertaking interviews with national policymakers who had been involved in developing CfE policy. This complemented and built on the earlier analysis of policy texts. Critical Realism highlights that individuals are unlikely to be fully aware of the mechanisms which influence social activity. However, interviews still have an important role to play within Critical Realist research. They can allow access to the ways in which participants saw events, and any constraints or opportunities they perceived, even if researchers cannot accept these at face value (Smith & Elger, 2014). Pragmatically, by using interviews researchers can also access rich data on perspectives, which would be difficult to gather in other ways (Smith & Elger, 2014). Qualitative data, such as that generated from interviews, can also help to understand "how official law or policies are interpreted, from the heights of inception down to the points of implementation, to the "street level" realities" (Altheide & Johnson, 2011, p. 583).

Table 5 shows how the two stages of research outlined above correspond to the study's three research questions outlined in chapter 1.

Table 5: Mapping of research questions and stages of analysis

Research questions	Stages of analysis	
	Analysis of curriculum policy texts	**Interviews with policymakers**
1) What interpretations of 'equity' have been advanced within CfE policy?	How key terms relating to social justice (including 'equity') are used.	Policymakers' views about the links between CfE policy and 'equity'.
2) How have interpretations of 'equity' within CfE policy changed over time? What factors have driven any change?	Consistency and change over time in how key terms relating to social justice are used.	Policymakers' views about any change over time in links between CfE policy and 'equity'.
3) What are the factors and considerations which explain the place of equity within CfE policy since its inception?	N/A - not addressed specifically	Policymakers' views on factors that have influenced the links between CfE policy and 'equity'.

Sections 5.4 and 5.5 now describe each research method in more detail.

5.4 Analysis of Curriculum for Excellence policy texts

To undertake the analysis of Curriculum for Excellence (CfE) policy texts, I selected an approach informed by Corpus Linguistics. Corpus Linguistics involves researchers using computer software to analyse large amounts of textual data - the corpus - and identify how language is used within it (Gray & Biber, 2011; Mulderrig, 2012). This analysis can be quantitative (counts of language patterns) or qualitative (themes) (Mulderrig, 2012). I adopted Corpus Linguistics for three main reasons. Firstly, it allowed me to systematically explore a large collection of curriculum policy texts. Secondly, it provided scope to explore change over time - which as noted above is a key focus of Critical Realist research and was also important for my own study. Thirdly, I hoped that a corpus-informed approach would generate "unexpected and often fruitful" insights into the policy texts - highlighting patterns in word usage which I may have missed by using more traditional, narrative-based approaches to policy analysis (Mulderrig, 2012, p. 702).

5.5 Interviews with Curriculum for Excellence policymakers

5.5.1 Choice of semi-structured interviews

I used the work of Smith and Elger (2014) and Tomlinson (1989) to inform my decisions about the specific type of interviews I would undertake. Smith and Elger (2014., p. 117) highlight that interviews undertaken within the Critical Realist paradigm should be "explicitly theory-driven, in the sense that the subject matter of the interview is the researcher's theory rather than the informant's thoughts and deeds". This means that the

researcher can ensure that key areas of their topic are addressed and can fully probe participants if any topics require further discussion (Smith & Elger, 2014). Researchers should also bear in mind the important knowledge and personal experience in the topic of interest that the interview participant brings (Smith & Elger, 2014).

To operationalise this guidance, I adopted Tomlinson's (1989) concept of "hierarchical focusing". Hierarchical focusing aims to combine openness to the interview participant's own perspectives with the main topics or issues the researcher wishes to address. Tomlinson (1989) recommends that researchers should first map out their topic area in a hierarchical way - with general topics underpinned by more specific sub-topics. Then, Tomlinson (1989) suggests that they develop a visual hierarchy of questions - with the main topics becoming general questions, and sub-topics becoming prompts. The researcher draws on the question hierarchy during the interviews. They first ask only a general question and then allow the interviewee to respond. If the interviewee covers any of the sub-topics spontaneously the researcher records this. If the interviewee has not mentioned any sub-topics the researcher can ask them direct questions about these. This approach allows the researcher to ensure that key topics of interest are addressed, while not overly directing the interview and allowing scope for spontaneous topics to emerge (Tomlinson, 1989).

When applying hierarchical focusing to my study, my initial mapping generated several main and sub-topics. For instance, the main topic 'CfE as a policy' encompassed the sub-topics 'rationale' and 'policy options'. I then used this mapping to develop the following main question and specific prompts.

> **Main question:** Thinking about the development of CfE policy in particular, how important have considerations of equity and/or equality been?
>
> **Prompts:** Main policy issues - CfE; Importance of equity/equality and socio-economic status; and shifts over time.

Appendix A includes the complete mapping of my topic area and Appendix B contains the full interview schedule.

5.5.2 Interview sample selection, recruitment, recording, and transcription

I considered sample size and appropriateness to ensure the quality of the data collected through the semi-structured interviews (Morse, 2015). The population of most relevance to the study's research questions was policymakers who had been significantly involved in developing CfE policy between 2002 and 2019, when I began the interviews (Palys, 2008). Although I did not have an exact number of interviews in mind, I was conscious that too small a sample would not reflect this population adequately and limit the validity of the data (Morse, 2015). Therefore, I intended to conduct interviews until I felt a saturation point in data addressing my research questions had been achieved (Morse, 2015). In sampling members of this population, I adopted a purposive sampling approach (Palys, 2008). I included individuals in the sample if they had been involved in developing CfE policy between 2002 and 2019 and had been in a senior role between these dates. The rationale for the second criterion was the specialised knowledge such senior policymakers were likely to have about CfE's policy development (Busby, 2018).

I identified policymakers to invite to take part in the study in four ways. Firstly, I drew on published sources listing policymakers' names, such as the membership of policy development groups. Secondly, I used my own knowledge as a member of staff within national education organisations. Thirdly, I discussed potential interviewees with my first supervisor, who was well informed about CfE. Finally, during the interviews I also asked participants for the names of other important individuals who were involved in significant decisions or who would have valuable knowledge about CfE (McPherson & Raab, 1988; Morgan, 2008). I adopted this as a suitable approach as the Scottish education policymaking community is a small one, with many links between members (McPherson & Raab, 1988; Morgan, 2008). In fact, interviewees tended to suggest many of the same names. I felt that this snowballing approach was appropriate given the size of the Scottish education policy community. To get in touch with most participants, I used their publicly available contact details or private direct messages on Twitter. Due to my role as a member of staff within Education Scotland, I already had direct contact details for three participants. In the end, I carried out 15 semi-structured interviews between June 2019 and February 2020. At this point, I felt that saturation in data and themes had been achieved (Morse, 2015) so I decided to stop data collection.

I digitally recorded each interview, with the permission of participants (Schensul, 2008). These audio files were only retained until I had an agreed transcript of each interview. I used the audio recording of each interview to produce a full verbatim transcript (Schensul, 2008). I decided to transcribe each interview in full given Critical Realism's emphasis on rich data to inform further analysis - and the fact that the interviews were my main source of primary data.

5.6 Ethical considerations

As discussed in section 5.4, the first phase of the study involved a computer-aided analysis of curriculum policy texts. As these were all publicly available, the analysis did not pose any significant ethical issues. The interviews with policymakers did require me to pay close attention to ethical issues such as participant anonymity, data protection and confidentiality, and informed consent.

5.6.1 Anonymity

As noted above, the education policy community in Scotland is small (McPherson & Raab, 1988). Given this, there was a risk that the research could reveal participants' identities, with negative consequences for them. These consequences could include damage to participants' professional reputations or, in the case of civil servants, their ability to provide trusted advice to ministers. I undertook several steps to minimise this risk. Firstly, I aimed to prevent participants' identities becoming known to others during the process of conducting the interviews e.g. through holding interviews in their own office building. Interviewees could choose to hold the interview in a location separate from their own workplace. This risk was particularly relevant as I worked in the same office building as several interviewees, and it was known that I was doing a PhD (although I aimed to describe its focus only in general terms when discussing it in the workplace and did not mention specific details of who I was interviewing). I held seven of the interviews in other locations - such as a quiet area in a café or an office booked in a building where neither me nor the interviewee worked. All but one of the other interviews were held in the participant's own office building. I went ahead with these interviews as I was aware that, when interviewing busy professionals, leaving their office to meet in another location was not always feasible. Although I am not aware that I knew anyone else in most of these office buildings, to minimise risks of participants being

identified, I informed any other staff members that I encountered (e.g. reception staff) that I had a meeting with the interviewee, rather than referring to a research interview. Although I had intended to carry out all interviews face to face, in the end one interview was held via video conferencing equipment, due to the interviewee's diary commitments, with a private room booked at either end.

Due to the focus of the research, I also originally decided to explore with participants whether open identification was a more appropriate strategy than anonymisation. This would involve participants developing a publicly attributable interview transcript (McPherson & Raab, 1988). Therefore, my consent form (described in more detail below) gave participants two options. The first was for them to agree to work with me to develop a publicly attributable interview transcript. The second was for me to anonymise participants' transcripts and not to name them in any research outputs. Option 2 reminded participants that it may still be possible for someone to identify them due to their comments. Of the 15 participants, seven indicated that they were content for their comments to be publicly attributable to them, while eight asked for their transcript to be anonymised. I found this split in preferences challenging when writing up the results of the analysis. For instance, I was concerned that, by naming some participants, I would potentially increase the chances of someone identifying the remaining ones - as it would be easier for them to 'eliminate' possible candidates. On reflection, I realised that it may have been better to clearly pursue one approach to anonymisation from the outset - either complete anonymisation or undertaking the research based on identifiable transcripts. As I had not done this, I decided to anonymise all participants within this thesis, and will do the same in any other publications based on the research. To do this, I have been cautious about describing events or decisions, using extracts from the data, and specifying a participant's role, organisation, or biographical details (Social Research Association, 2003).

I sent all participants a full transcript of their interview for accuracy checking. Participants asked for a small number of changes to their transcripts. In my judgement, in only one case was significant information removed from a transcript. Two participants did not respond to repeated requests to check their transcript. I did include these transcripts within the analysis as both participants had completed the consent form, but I

closely examined any extracts from their data used within this thesis to check what information I was sharing.

5.6.2 Data protection and confidentiality

The ethical issues of data protection and confidentiality were also relevant for my study. I treated personal data about interview participants in line with the General Data Protection Regulation (GDPR). The main types of personal data which I collected from participants were their name, contact details, and email address. I needed to process these personal data to organise the research interviews, therefore these details did not form part of my data analysis. The lawful basis for processing these personal data was consent.

I also stored participants' personal data securely within my password protected University of Stirling email account, to which only I had access, or in a locked filing cabinet in my home - in the case of consent forms. I stored the anonymised transcripts separately in a password protected One Drive folder. The University of Stirling Data Protection guidance for research projects (University of Stirling, 2021) highlights that personal data collected as part of a research project should not be kept for longer than is necessary. In line with this, I plan to retain participants' personal data (e.g. email addresses, names on consent forms) until the end of my doctorate, so that I can get in touch with them if required. I will then destroy the participants' personal data by permanent deletion. I intend to retain the anonymised interview transcripts and other analysis documents to support future publishing, which will take place after the end of my doctorate. This will allow me to re-analyse or check these data if required. Participants' permission for this was gathered via the consent form (which I will also retain on file).

Information relating to data protection was also contained in the written information sheet and consent form described in the next section. For the purposes of the GDPR, the information sheet also constituted a Privacy Notice making clear the lawful basis under which I was processing personal data.

5.6.3 Informed consent

I undertook several complementary steps to ensure informed consent (Fisher & Anushko, 2008; Social Research Association, 2003). Firstly, I developed a written information

sheet (Appendix C) about the study. This included an overview of my institutional affiliation and role as a doctoral student, the aims of the study, the methods used, and how I planned to analyse and use the data in future (Cohen et al., 2007). The information sheet made clear to participants that they were not required to participate in the research, and that they had the right to withdraw their participation at any point (Cohen et al., 2007; Social Research Association, 2003). It also reminded potential participants about their right to seek independent advice and guidance about the research or raise formal complaints with the Dean of the Faculty of Social Sciences at the University of Stirling. I emailed a copy of the information sheet to all participants and gave them the choice of retaining a printed copy following the interview.

Recognising that a written information sheet may not be enough to fully ensure informed consent for all participants, I offered to answer any questions they had about the research via telephone or email (McPherson & Raab, 1988). During these discussions I aimed to cover important points such as the purpose of the research, participants' own rights as research subjects (e.g. the right to withdraw at any point), what would be asked of participants, and the principles of anonymity and confidentiality which I was following. Not all participants asked for this kind of engagement, although I did hold telephone conversations with two participants in advance of the formal interviews.

The third main strategy I adopted to ensure informed consent was the use of a participant consent form (see Appendix D). This form allowed participants to record that they had understood the key areas of informed consent as outlined above. At the beginning of each interview, I asked participants to review this form and to initial each statement. Following each interview, I retained the signed hard copy forms on file, stored securely within a locked cabinet within my home (Bryman, 2008).

5.6.4 Ethical approval

I gained ethical approval for my study from the University of Stirling's General Ethics Panel in September 2018. Appendix E confirms that this ethical approval was received.

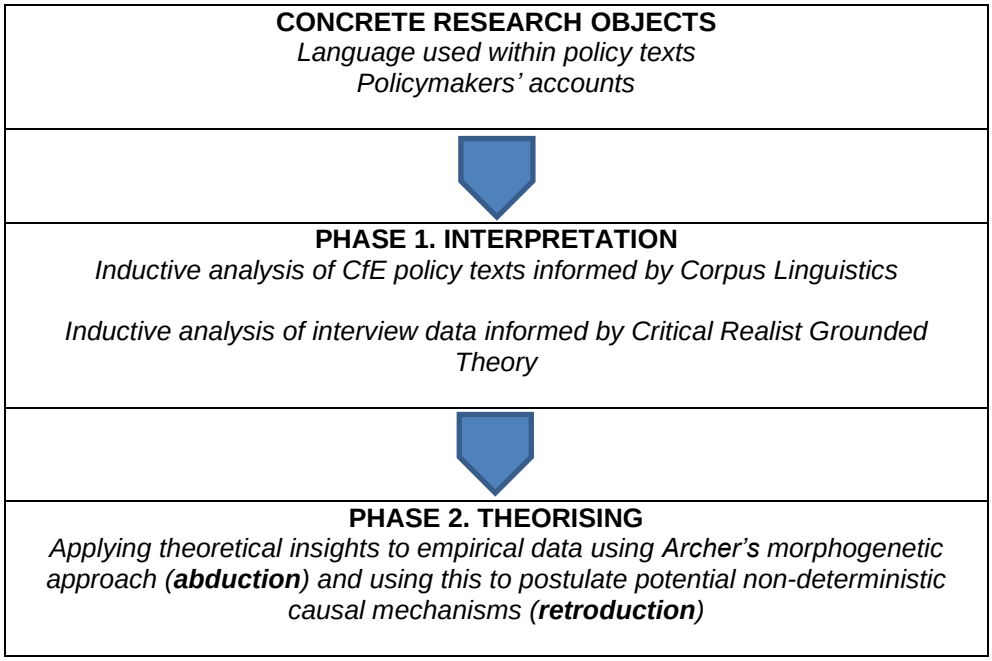
5.7 Data analysis

5.7.1 Operationalising Critical Realism within data analysis

Critical Realist researchers use insights from the existing literature to theorise about the mechanisms which underpin their data. However, researchers have different views about when it is appropriate to do this. Danermark and colleagues (2002) suggest that researchers draw on the literature early in their studies to help them conceptualise potential mechanisms. In contrast, Raduescu and Vessey (2009) highlight that it is difficult for researchers to do this when there is no single domain- or discipline-specific theory that is directly or indirectly related to their research questions. They suggest that this challenge is likely to be common within the social sciences, due to the unstructured and cross-disciplinary research problems they typically deal with. Raduescu and Vessey (2009) characterise this kind of research as "Type III" in their helpful typology of Critical Realist research studies. These are studies where it makes sense to begin with the data themselves, and then move on to explore which mechanisms may be responsible for patterns or events within them. By starting with the data, researchers can more easily identify which aspects of existing theory are likely to be a 'best fit' for them.

In line with Raduescu and Vessey's 'Type III' approach, I first analysed the data without explicitly using the literature to identify potential mechanisms. This was because, as noted in chapter 3, the existing literature has not explored the links between equity and curriculum policy extensively. My analytical strategy involved an initial 'interpretation' phase, applying an inductive approach to both the analysis of Curriculum for Excellence policy texts, which was informed by Corpus Linguistics, and the analysis of the interview data, which drew on Grounded Theory. Having analysed both sets of data in this way, I then moved on to a second 'theorising' phase, during which I used Archer's (1995) morphogenetic approach to identify potential mechanisms, which Archer interprets as cultural and structural factors, that would help to explain my initial findings. The theorising phase of analysis allowed me to apply Critical Realism's distinct analytical logics of retroduction and abduction. Figure 5 below outlines the two main stages in this analytical strategy.

Figure 5: Overview of Analytical Strategy



Based on: Crinson (2007); Fletcher (2017)

Sections 5.7.2 and 5.7.3 focus on the inductive 'interpretation' phase of analysis, while section 5.7.4 moves on to describe the 'theorising' phase.

5.7.2 Interpretation phase: Analysis of CfE policy texts

Section 5.4 has explained the choice of Corpus Linguistics as an analytical approach. Very little of the Scottish curriculum is prescribed by legislation, rather it takes the form of national 'guidance' (Scott, 2013). Therefore, I initially found it challenging to define which texts to include within the corpus. To help with this, I drew on Levin's (1997) framework of policy attributes to define which texts made up Curriculum for Excellence (CfE) 'policy'. These attributes include ownership by a government entity and the need for policy to set out a series of goals or actions (Levin, 1997). I identified a total of 30 texts as making up national 'guidance' on CfE and therefore as forming its overarching policy framework. These 30 texts were all published between 2004 and 2016 by the Scottish Executive/Government[5] or Education Scotland, the national education improvement agency. They were all intended to be read by an audience of "educators"

[5] As noted in chapter 4, between 1999 and 2007, the devolved government of Scotland was known as The Scottish Executive. In 2007, it was renamed The Scottish Government by the newly elected Scottish National Party government.

involved in enacting CfE (e.g. Scottish Executive 2006b, p. ii). Having identified these 30 texts, I then grouped them into four sub-categories.

1) **Foundational texts** (2004-06) produced by the Curriculum Review Group and the Scottish Executive at the outset of CfE, they set out its purpose and key elements.

2) ***Building the Curriculum* texts** (2006-11) - these texts, produced by the Scottish Executive/Government, elaborated various aspects of CfE including pedagogy, curriculum design, and the place of skills and assessment.

3) **CfE Briefings** (2012-15) produced by Education Scotland, these are a series of 17 short (typically four page) texts which provided further guidance for practitioners on enacting aspects of CfE, including curriculum planning and specific areas of the curriculum.

4) **Reprioritisation texts** (2015-16) include one text produced by the Scottish Government (the *Delivery Plan* mentioned in chapter 4), which sets out a new set of educational priorities, including for CfE; and a re-statement of the framework for CfE authored by the Chief Inspector for Schools and produced by Education Scotland (the *Chief Inspector's Statement* mentioned in chapter 4).

Appendix F provides a complete overview of the individual texts within each of the four sub-categories.

The 30 policy texts were all publicly available online in PDF format, from either the Education Scotland or Scottish Government websites. I converted them from PDF to Plain Text file format using AntFileConverter, a free online tool (Anthony, 2017). Before analysis, it was essential for me to prepare the texts by undertaking a mark-up process (McEnery et al., 2006). Mark-up is important within Corpus Linguistics because it makes explicit what each text is and whether any material (e.g. a chart) has been omitted (McEnery et al., 2006). It also assists with linguistic analysis by allowing extraneous matter, such as appendices or headings, to be excluded. Different mark-up schemes vary in their complexity. I chose to use the Corpus Encoding Standard (CES) (Expert Advisory Group on Language Engineering Standards, 2000). This mark-up scheme is relatively straightforward to apply while still preserving important textual and contextual data

(McEnery et al., 2006). The CES records contextual data about a text, such as its publisher and date of publication. It also applies a consistent system of textual tags to identify important elements such as front and end matter, paragraphs, headings, or linguistic features.

I applied Level 1 of the CES, which is the minimum encoding level required for a text to conform with the CES (McEnery et al., 2006). Level 1 marks up elements of the text down to paragraph level. I undertook some mark-up beyond Level 1, at sub-paragraph level, to identify elements such as italicised or bold font (McEnery et al., 2006). This allowed me to preserve the highlighting elements within each text in case they were relevant to the analysis. I also hoped that undertaking this extra mark-up would make the collection of CfE texts a more useful resource for other corpus-based researchers.

For example, I marked up a paragraph from the start of *A Curriculum for Excellence* (Scottish Executive, 2004a) as follows.

> * <head>background</head>*
>
> * The Scottish Executive's vision for children and young people is "A Scotland in which every child matters, where every child, regardless of his or her family background, has the best possible start in life". *

The tags used in this example are:

> ** ** - relates to how the document is structured, in this case a main section.
>
> **<head> and </head>** - represents a heading.
>
> ** and ** - indicates a paragraph.

Appendix G includes the full list of the tags I applied during the mark-up process.

I imported the 30 marked-up texts to a commonly used corpus software package: WordSmith Tools version 7.0 (Scott, 2019). In line with the first two research questions, the analysis aimed to explore the extent to which social justice terms were an explicit focus within the collection of CfE texts and how these terms were discussed in context within these texts. I also aimed to explore how the term 'knowledge' was used within the

texts, due to its significance in explaining CfE's approach to curriculum regulation. To achieve these aims, I undertook several stages of analysis.

Firstly, I used WordSmith Tools to explore a group of social justice-related terms within the policy texts. The choice of these terms was informed by the literature. For instance, as noted in chapter 2, the term 'equity' is often used interchangeably with 'equality' and so it was important to explore how both terms were used within the CfE texts. It was also important to explore a wider set of terms due to the likelihood that, as set out in chapter 4, CfE policy did not always have an explicit focus on the term 'equity'. Table 6 shows these terms along with the specific search criteria used to locate them.

Table 6: Social justice-related terms and search criteria

Social justice-related terms	Search criteria
Equity; Inequity	*equity
Equal; Equality; Equalities; Inequality; Equalitarian	equal, *equalit*
Poverty; Poor; Poorer; Poorest	*pover*, poor*
Justness; Unjustness; Justice; Injustice(s)	*justness, *justice*
Disadvantage; Disadvantaged	disadvantage*
Deprived; Deprivation	depriv*
Socio-economic; Socio-economic status	socio*
Fair; Unfair; Fairness; Unfairness; Fairly	*fair*[6]
Bias; Biased	bias*

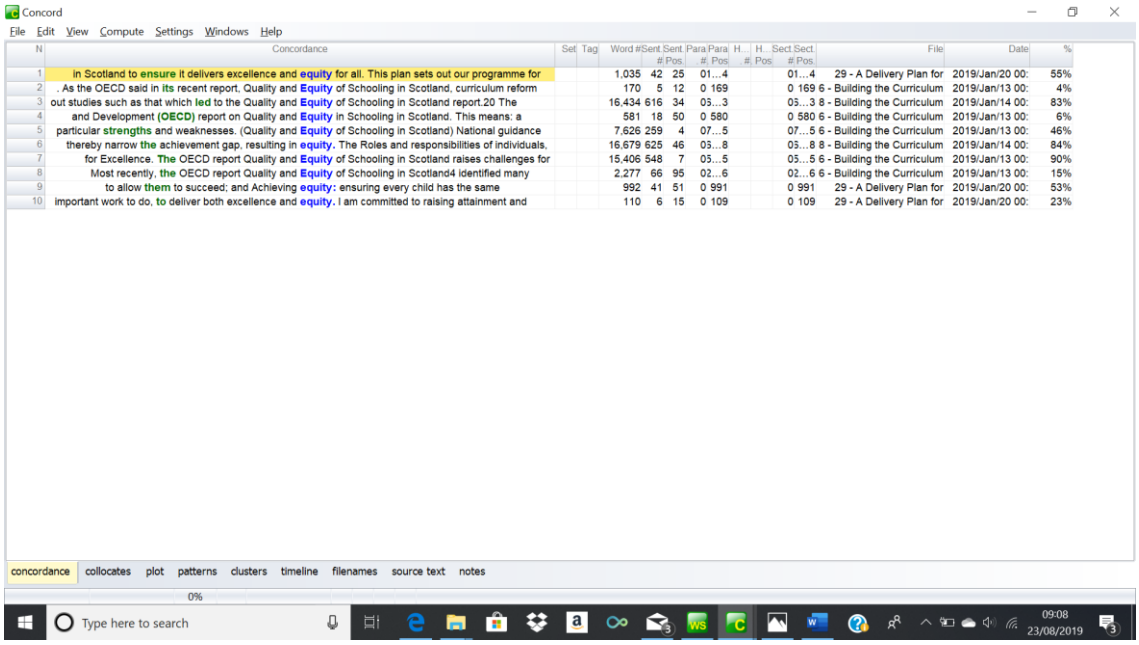
I used WordSmith Tools to calculate frequencies for the social justice-related terms within the whole collection of CfE texts. This analysis indicated the extent to which the wider topic of social justice, as well as the specific term 'equity', was considered within the policy texts. Following this, I calculated normalised frequencies for the social justice-related terms within each of the four subcategories of texts - to take account of the fact that some were much longer than others. To do this, I calculated a raw frequency for the number of times the social justice-related terms were used within each of the four sub-categories. I then normalised these raw frequencies to calculate the number of terms per 1,000 words. I chose the 1,000-word level due to the relatively small size of the sub-categories - for instance the 're-prioritisation' texts only contained 4,303 words (McEnery et al., 2006).

The second stage of analysis explored how the social justice-related terms were used within the collection of CfE texts, using the 'Concordance' function within WordSmith

[6] This search term produced one result which was a school name ('Fairview School'). This result was not included in the rest of the analysis described below.

Tools. This function brings together all examples of a word or phrase with its corresponding co-text (known as concordance lines). The researcher can read vertically down all instances of a particular term in context and identify patterns of usage, which may not be apparent otherwise (Mulderigg, 2012). Figure 6 shows an example of a concordance line output for the term 'equity'.

Figure 6: Example concordance line output, WordSmith Tools



Initially, I read each concordance line along with, when required, the surrounding text in the source document to understand how the term of interest was used. WordSmith Tools allowed me to move quickly from the concordance line output shown above to the source documents. I also exported the concordance line output for each of the social justice-related terms to MS Excel, and then categorised their role in the sentence (i.e. noun or adjective) and their meaning. At this stage, I grouped these meaning-related categories to identify the main ways in which clusters of terms - for instance all those linked to equality - were used within the collection of CfE texts. Finally, I also explored how the term 'knowledge' was used within the texts in the same way - by exploring its raw and normalised frequencies within the CfE texts, and then looking in more detail at how it was used in context.

5.7.3 Interpretation phase: Analysis of interview data

As noted in section 5.7.1, I used Raduescu and Vessey's (2009) 'Type III' Critical Realist research to inform my overall approach to data analysis. While this made sense as a broad strategy, I drew on literature about the links between Grounded Theory and Critical Realism to plan the analysis of the interview data in more detail. Researchers have debated whether drawing on Grounded Theory is appropriate for Critical Realist research (Fletcher, 2017; Hoddy, 2019). Some researchers (i.e. Danermark et al., 2002; Fletcher, 2017) see Grounded Theory's focus on limiting engagement with the existing literature as incompatible with Critical Realism. In contrast, Oliver (2012) suggests that analytical approaches drawn from Grounded Theory can be used within Critical Realist research studies. She highlights that Grounded Theory has developed substantially since it was originally introduced by Glaser and Strauss in the 1960s. Grounded Theory researchers were originally opposed to using pre-existing analytical theories as part of their data analysis, out of a concern that this could skew the emerging findings. However, more recently Grounded Theory researchers have come to recognise the value of considering potential theoretical explanations as they analyse their data. Therefore, there does not appear to be a fundamental tension between Grounded Theory and Critical Realism. Oliver (2012, p. 378) suggests that a "Critical Realist Grounded Theory":

> *"... would address both the event itself and the meanings made of it, approach data with the preconceived analytical concepts of emergence and generative mechanisms and pursue emancipatory, rather than merely descriptive, goals".*

To achieve these aims, Oliver explains that Critical Realist Grounded Theory would still begin with a detailed coding of the data. However, it would then move beyond these data by beginning to theorise about potential structuring mechanisms. For my study, such an approach was helpful for two main reasons. Firstly, I hoped that using an inductive approach would provide an interesting descriptive account of my research topic, which has not been researched before. Secondly, it aligned well with Critical Realism's depth ontology, which reminds us that empirical data will reflect the "representations, beliefs and shared meanings […] of the social groups under investigation" (Crinson, 2001, p. 10). However, the way that individuals perceive the world is likely to differ from its actual structure (Crinson, 2001). Therefore, there are likely to be inconsistencies or blind spots in any codes or categories that researchers initially develop based on empirical data. Although such data need to be treated with caution, they can still be valuable in

themselves - as they can prompt researchers to consider possible underlying mechanisms (Crinson, 2001).

My initial analysis of the interview data involved using the NVivo 12 qualitative data analysis package to undertake two cycles of coding. Firstly, I undertook an initial coding cycle (Saldaña, 2013) that broke the data down into smaller parts. Initial coding does not have a prescriptive methodology for identifying codes based on the data (Saldaña, 2013). Therefore, I applied a mix of process (summarising action within the data), in-vivo (using memorable words or phrases from participants themselves) and descriptive (summarising words/phrases) codes to each interview transcript, on a line-by-line basis (Hoddy, 2019; Saldaña, 2013). Initial coding recognises that all codes are provisional and are likely to be revised. In line with this, after coding each interview transcript I reviewed, combined, and amended the codes. For example, as analysis progressed, I tended to integrate in-vivo codes with descriptive codes, while merging similar codes such as "curriculum access difficult" and "curriculum accessibility" into a single code. The number of codes increased from 79 after coding the first interview to 143 after coding the second one. The number of codes then became more stable as coding progressed. For instance, by the end of coding the sixth interview the number of codes stood at 95. After coding this interview (roughly halfway through the analysis), I undertook a more detailed review of all codes, closely reading all the data coded under each one again and reducing their number to 77. Although the number of codes then increased above 100 as coding the remaining interviews progressed, by the end of the process of analysing all 15 interviews I had identified a stable set of 76 codes.

The second cycle of coding involved bringing together the initial codes into a smaller number of broader categories. Code mapping (Saldaña, 2013) involves comparing and sorting initial codes, and their associated analytic memos (see below). I began the process of code mapping after coding the ninth interview and identified 10 categories at this point. I then reviewed the categories following the coding of each subsequent interview, identifying a final set of 8 categories. Appendix H provides an overview of the categories identified through the analysis, and their corresponding codes.

I accompanied the two stages of coding by writing analytic memos reflecting on codes and potential emerging categories (Saldaña, 2013). I initially created an analytic memo for each code using the 'Reflective Journal' tool within NVivo 12. As I reviewed and

merged some codes, I also combined their linked memos. At first, I structured these memos chronologically as I coded data under each code - building up a series of observations or prompt questions to consider. By the time that I had coded the sixth interview, I felt I had enough data under many codes to begin writing brief summaries of each memo. Using the analytic memos in this way was a helpful discipline during the coding process, as it required me to step back from coding and consider the meaning of each code. Otherwise, there would have been a risk of coding too quickly. The memos also proved very helpful in identifying points of interest to include in the write up of the analysis process. As noted above, I did not intend to link the initial codes or categories to existing theory. However, within the analytic memos I did begin to note down my early thoughts about potential mechanisms, or other links with Critical Realism or Archer's (1995) morphogenetic approach. This aligns with Hoddy's (2019) experience that some initial codes prompted him to begin thinking how to describe them theoretically. Appendix I includes an example of an analytic memo reflecting on a code related to the 2007 review of Scottish education carried out by the Organisation for Economic Co-operation and Development (OECD).

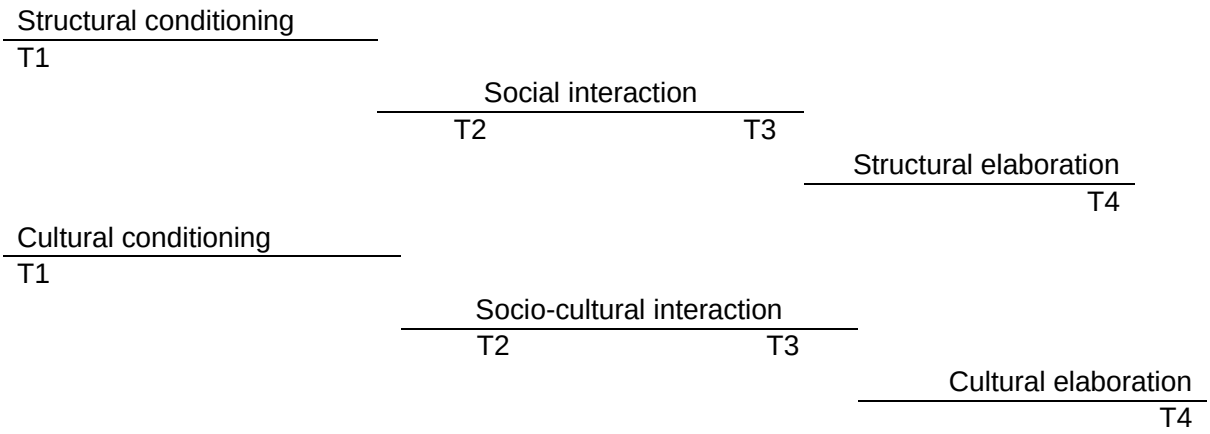
5.7.4 Theorising phase: The morphogenetic approach

Archer intended the morphogenetic approach to be a practical strategy which researchers could apply to a wide range of research topics. She described it as the "methodological complement of Critical Realism, which is its meta-theoretical social ontology" (Archer, 2013, p. 9). The morphogenetic approach interprets Critical Realism's concept of structuring, non-deterministic mechanisms as *processes of mediation* - in which existing contexts influence social interaction (Archer, 1995). For analytical purposes, Archer distinguishes between structural and cultural influences on social interaction, as well as emphasising the role of human agency in responding to these influences. She defines structures as relatively enduring entities which pre-date the actions of individual human beings, but which can also be transformed by their actions. Structures can include job roles and organisations. Archer (2011) defines cultural influences as those which relate to ideas or propositions. Archer (2011) is particularly interested in how ideas relate to each other, as well as how they achieve social prominence. Finally, Archer's (1998) analytical category of agency establishes the place of individual human actors, who by interacting with existing structures or cultural forms, can either transform them - leading

to morphogenesis (lack of change) - or reproduce them - leading to morphostasis (change).

Archer (1995) suggests that culture, structure, and agency can be examined over three different time periods, as shown in Figure 7 below, which sets out one morphogenetic cycle (with 'T' standing for 'time').

Figure 7: The morphogenetic cycle



Source: Archer (1995)

Archer (1995) begins by considering the 'first order emergents' in play at the beginning of any morphogenetic cycle, at T1 on Figure 7. First order emergents describe three main types of resources - financial resources, sanctions, and expertise. These resources are distributed in particular ways at T1 because of social and socio-cultural interaction during previous morphogenetic cycles. Groups with the highest levels of access to these resources are in the best position to achieve their goals (Archer, 1995).

As well as the prior distribution of these resources, the morphogenetic cycle above shows that structural and cultural conditioning at T1 will provide the context for any future social interaction. Archer (2013) describes these existing structural or cultural contexts at any T1 as 'second-order emergents'. Cultural or structural second-order emergents exert their own constraining effects on the situations that human actors find themselves in. Archer (1995) describes these constraining effects as "situational logics". Situational logics, like Critical Realism's concept of mechanisms, are not deterministic. However, they create 'opportunity costs' for those who seek to challenge them, making certain social or cultural interaction strategies less appealing (Greener et al., 2007; Herepath, 2014). Porpora (2013, p. 28) highlights that the concept of situational logics was well

expressed by Marx's statement that humans "make their history but not under circumstances of their own making". Archer's concept of situational logics allows researchers to theorise about which cultural or structural conditions may have been in place at T1. They can do this in several ways: by reconstructing likely cultural or structural alignment at T1; by identifying the strategies that actors used to achieve their goals between T2 and T3 (e.g. in interacting with other groups, in promoting different ideas etc.); and finally by considering whether actors have been successful or unsuccessful in achieving their goals at T4.

Archer's morphogenetic approach provides a structured way of undertaking the first of these sets of analysis - reconstructing likely cultural or structural alignment at any T1. For cultural forms, firstly, sets of ideas can either be complementary - with a logical connection between them - or contradictory. Cultural forms can also have either a necessary relationship - in which one set of cultural forms is required to support the other - or a contingent one - in which one can be upheld without requiring the other. When combined, these relationships between cultural forms generate four possible pairings (Archer, 1995). Figure 8 shows these pairings, along with the cultural situational logics they typically generate and the likely socio-cultural interaction that they will produce.

Figure 8: Potential relationships between cultural forms

	NECESSARY	CONTINGENT
COMPLEMENTARY	**Necessary complementarities:** two sets of cultural forms are both logically consistent and interdependent. *Generate a situational logic of…* **Protection:** strengthening relationship between cultural forms but resistance to new ideas from outside (artificial stabilisation). *Tends towards…* **Cultural MORPHOSTASIS**	**Contingent complementarities:** two sets of cultural forms are logically consistent, but it is possible to uphold one without the other. *Generate a situational logic of…* **Opportunism:** possible to produce novel combinations of both cultural forms. *Tends towards…* **Cultural MORPHOGENESIS**
CONTRADICTORY	**Necessary contradictions:** two sets of cultural forms are logically inconsistent but (for whatever reason) it is important for someone to uphold them both. *Generate a situational logic of…* **Correction:** of the relationship between contradictory cultural forms - through reinterpretation of one, other, or all of them. *Tends towards…* **Cultural MORPOHSTASIS**	**Contingent contradictions:** two sets of cultural forms are logically inconsistent, but it is possible to uphold one without the other. *Generate a situational logic of…* **Elimination:** remove one cultural form - actors accentuate the differences between them. Battle ground of ideas. *Tends towards…* **Cultural MORPHOGENESIS**

Greener and colleagues (2007) provide an example of how Archer's work on the relationship between cultural forms can be applied to UK health policy. They suggest that cultural contradictions between two sets of ideas arose within the NHS in the 1980s. A new set of ideas saw health professionals as the agents of patients and assumed that they would happily select the most effective and efficient treatment options from a range of providers. This cultural form underpinned market-based reforms to health policy undertaken by the Conservative Government. The second set of ideas drew on the longer-established links which health professionals had with a trusted set of local providers, which made them resist more competition and choice within the NHS (Greener et al., 2007). As a result of the inconsistency between these cultural forms, there was open conflict between health professionals and the Government. This led to:

> *"[…] the Department of Health quickly moving away from market ideas and language, and adopting instead a remarkably pragmatic approach to implementing the internal market that led to the architect of the reforms, Kenneth Clarke, being replaced as Secretary of State by a series of more conciliatory figures"* (Greener et al., 2007, p. 128).

Although the authors do not specifically link this outcome back to Archer's work, their example appears to illustrate the situational logic of correction shown in Figure 8 above. This situational logic suggests that, when cultural forms have a necessary but contradictory relationship - in other words where two cultural forms must be upheld but there is conflict between them - actors will seek to reinterpret one or both sets of ideas. In the case of health policy in the 1980s, this involved the Government changing how market-based reforms were presented to resolve cultural conflict with the health professionals who were required to realise them.

Archer (1995) uses a similar set of concepts to describe the relationships between structural second-order emergents. The concept of complementarity relates to the extent to which structural institutions support or challenge each other's operations. Contingency relates to whether one structural institution requires the other to operate or not. A necessary relationship means that one institution cannot exist without the other, while a contingent relationship does not display this characteristic. Drawing on the possible combinations of these two dimensions, Figure 9 shows the possible relationships between two structural institutions and the potential situational logics they will generate.

Figure 9: Potential relationships between structural institutions

	NECESSARY	**CONTINGENT**
COMPLEMENTARY	**Necessary complementarities: o**ne institution cannot exist without the other, and their operations are mutually reinforcing. *Generate a situational logic of…* **Protection:** each institution has something to lose from change. *Tends towards…* **Structural MORPHOSTASIS**	**Contingent complementarities: o**ne institution does not require the other to exist, but their operations are mutually reinforcing. *Generate a situational logic of…* **Opportunism:** the institutions form new kinds of relationships to take advantage of their shared interests. *Tends towards…* **Structural MORPHOGENESIS**
CONTRADICTORY	**Necessary contradictions: o**ne institution cannot exist without the other, but the institutions challenge each other's operations. *Generate a situational logic of…* **Correction:** each institution promotes its own vested interests but has to balance this against potential losses. *Tends towards…* **Structural MORPHOSTASIS**	**Contingent contradictions:** One institution does not require the other to exist, and the institutions challenge each other's operations. *Generate a situational logic of…* **Elimination:** each institution realises that the greatest gains will come from eliminating the other one. *Tends towards…* **Structural MORPHOGENESIS**

Greener and colleagues' (2007) work on UK health policy again illustrates the situational logics generated by different kinds of structural relationships. The authors describe growing conflict between the state and health professionals working within the NHS in the 2000s. They suggest that this conflict had been generated by structural changes which had given private health providers a greater role in the provision of NHS services. As a result, the interdependent relationship between the state and the medical profession had been eroded. In Archer's terms, the relationship between the state and the NHS medical profession changed from a necessary to a contingent one. The authors suggest that this changing structural relationship contained the potential for increased conflict.

I drew on Priestley and Miller's (2012) work to help apply Archer's analysis of cultural and structural relationships to my research on CfE policy. These authors suggest that researchers consider policy ideas as a set of cultural forms and explore the extent to which policy ideas are realised in existing social and cultural contexts. Drawing on this helpful framing, I interpreted the ideas about equity contained within Curriculum for Excellence (CfE) policy as a set of cultural forms. This allowed me to consider whether the relationships between these cultural forms within my data were complementary or contingent (Archer 1995). Similarly, I interpreted any data about the extent to which these cultural forms were realised, or met challenges, as relating to structural relationships. As noted above, Archer defines structures as relatively enduring entities which pre-date the actions of individual human beings, but which can be transformed by them. In applying the concept of structure to my own study, I also drew on the work of Elder-Vass (2010, p. 86), who defines structures as "the causal powers of specific social groups". For Elder-Vass, organisations are one of the two main types of emergent social structures (the other is normative social institutions). I found Elder-Vass's work helpful due to my study's focus on policy generated by government or other national organisations. Elder-Vass (2010, p. 195) highlights that organisations possess emergent properties which "act through the individual".

I found few detailed descriptions of how other researchers had applied Archer's (1995) morphogenetic approach to a process of data analysis. For instance, Volkoff and colleagues (2007) undertook a Grounded Theory analysis of organisational change resulting from the adoption of new software. They drew on Archer's (1995) work to develop a mid-range theory drawing on the three elements of the morphogenetic cycle -

structure, culture, and agency. Although the authors clearly describe how they undertook the Grounded Theory elements of the analysis - through various cycles of coding, resulting in the identification of the concept of 'embeddedness' - it is not clear how they applied Archer's work to these codes. Therefore, when planning how I would apply the morphogenetic approach to my own study, I drew on descriptions of how theory was integrated within Critical Realist research studies more generally. Drawing on the work of Hoddy (2019) and Crinson (2001), I intended to undertake a final, directed coding cycle within NVivo 12. This would have involved applying theoretical 'parent' categories, derived from Archer's (1995) analytical categories of structure, culture, and agency, to the codes and categories identified from the first stage of analysis. Alongside this, recognising the importance of Archer's focus on time, I intended to build up a timeline of specific described events, changes, decisions, and milestones from the empirical data, using MS Excel.

However, I found applying the morphogenetic approach in this way to be challenging. The main challenge was that the codes and categories from the initial analysis of the interview data did not necessarily link to more abstract concepts such as 'structure' or 'agency' (Kempster & Parry, 2014). As Kempster and Parry (2014, p. 97) have noted, "causal powers either exist and have impact, exist and do not have impact, or do not exist". Where such causal powers do exist, they are likely to be implicit within the data. This is because, as Crinson (2001) points out, even abstracted themes derived from data will still essentially represent the perspective of social agents. Another challenge came from applying the morphogenetic approach in a structured way. When undertaking a piece of research, the researcher starts from T4 (i.e. the 'end' of the morphogenetic cycle shown in Figure 7) and attempts to reconstruct the preceding interplay of structure, culture, and agency which has led to it. I found it difficult to do this simply through a process of assigning 'parent' codes which organised the existing codes and categories in a different way. What I found to be lacking was an overview of the different chronological stages within the morphogenetic cycles I was trying to re-assemble. A final challenge emerged from the difficulty of linking the chronological overview of the data to a further cycle of coding, as this meant working across two software packages - NVivo 12 and MS Excel.

Due to these challenges, I developed an alternative approach which involved moving away from my original intention to undertake a final theoretical coding exercise. Instead, I used a series of analytical tables to recontextualise the findings from both earlier stages of analysis. In designing these tables, I remained mindful of Archer's (1995, p. 324) advice that "The investigative focus may be on one [*culture*, *structure*, *agency*] alone, but the investigation itself cannot fail to introduce the other two". In line with this approach, the analytical tables aimed to separate out cultural relationships, the role of structural institutions, and subsequent social interaction. Therefore, each analytical table contained one column for culture and one column for structure. From top to bottom, the tables contained rows covering T1 to T4 within the Morphogenetic Cycle and several analytical categories - working down from the structural and cultural context at T1, through the likely situational logics at play and finishing with cultural or structural morphogenesis/morphostasis. At the bottom of each column, the analytical tables contained space to record relevant findings from the previous stages of analysis, as well as relevant insights from the literature. These tables therefore supported Critical Realism's two distinctive analytical approaches - abduction and retroduction. They facilitated abduction by allowing Archer's (1995) morphogenetic approach to be applied to a specific set of data and incorporating relevant elements of the wider literature. The tables facilitated retroduction by providing a structured means of 'working back' from empirical data, and also backwards in time, to theorise about potential mechanisms. Appendix J contains a sample analytical table.

5.8 Insider/outsider status

In planning and undertaking the research study, it was important for me to reflect on my own positioning as an 'insider' researcher - as first signalled in chapter 1. At the outset of the study, my positioning as an insider appeared relatively straightforward: I was a member of staff at Education Scotland, one of the organisations which had been heavily involved in the development of Curriculum for Excellence (CfE), and I aimed to interview current and previous members of staff. Similarly, I was also a civil servant and planned to interview current and previous staff from the Scottish Executive/Government. Therefore, I would need to consider and acknowledge how these professional roles could influence the scope of the study, data collection, and analysis. Equally, I would need to aim to minimise any potentially negative consequences of the research, both for

participants taking part and for my own career. Although these issues did remain relevant throughout the study, as the work progressed, at times I felt much more like an outsider. In chapter 1, I have already described how the decision to undertake my doctoral study in the first place was prompted by my experience of working within two national education agencies (Breen, 2007). The following sections therefore consider the other ways in which both insider and outsider perspectives were relevant to my study.

5.8.1 Access to research participants

My status as an insider is relevant to the selection of study participants. By the time I began contacting people to be interviewed, I had previously met or worked with 10 of the 15 interview participants. The fact that I already knew two thirds of the interview participants is perhaps unsurprising, as by the time I came to organise the interviews I had worked in national education organisations for 12 years. Those participants I did not know tended to have been involved with CfE at an earlier stage of policy development - from 2004 onwards - before I had started working for national education organisations. I had varied levels of familiarity with the 10 participants I did know. All of them worked in more senior roles than I did, although I had generally attended meetings, or discussed specific pieces of work, with them. Some of my professional connections with them were more frequent or more recent by the time of the interviews. Therefore, even as a researcher with 'insider' connections, I did not feel that I was only relying on participants that I felt especially familiar with (Breen, 2007; Unluer, 2012).

It is possible that the 10 interviewees who had met me before were more likely to agree to speak to me than to a researcher they did not know (Chavez, 2008). My initial contact with all participants may also have had more impact due to my experience of interacting with senior policymakers, including in writing. I had a high success rate in converting approaches for interviews into acceptances (Mercer, 2006; Unluer, 2012). Overall, another researcher without my professional experience may have been less likely to access the full range of participants that I did (Mercer, 2006).

I am less clear whether any advantages in gaining access were compensated for by increased insights. It may be that interviewees were more likely to be open with me due to my 'insider' status (Fleming, 2018). This is difficult to qualify. I can certainly point to a few occasions where participants shared information with me that I am not aware has

been in the public domain before. However, one participant later requested that this information was removed from their final interview transcript. I was conscious that, at points, other participants were merely repeating publicly available 'lines' to me, rather than really answering my questions. I had the sense that some interviewees were practised at being interviewed, and I did leave some interviews feeling dissatisfied with the overall account that had been provided. This highlighted that, even though I had pre-existing relationships with some of my participants, I was still undertaking research with members of an 'elite' group of policymakers (Busby, 2011). Working with elite research participants requires the researcher to deal with issues of power and control, for instance that participants may provide only a selective picture of events (Busby, 2011). Although I attempted to gather as much information as possible from participants, using the analysis of CfE policy texts or other participants' comments as an 'external' reference point, it did not always feel that this was successful. I aimed to address this issue by attempting to interview as wide a range of policymakers as possible - to at least capture different perspectives and compensate for any gaps in individual accounts. However, I am not certain that my status as an 'insider' researcher led to complete access to new insights - one of the supposed advantages of this status (Breen, 2007; Chavez, 2008).

5.8.2 Carrying out the interviews

Fleming (2018) has observed that, even if a researcher comes from the same organisation, they may feel more like an outsider if they are studying people or topics they do not typically interact with. I felt that this was the case with my own study. Despite my pre-existing relationships with participants, during the interviews I often felt distinctly like an outsider - in the sense that I did not feel I shared a complete identity and language with participants, which is another apparent characteristic of the insider researcher (Oliver 2020). My sense of being an outsider was related both to my own professional role and to the expectations within the organisation I worked for. In my day-to-day role, I was not used to having substantive conversations with colleagues about educational topics such as those that my study addressed. Therefore, particularly during the early interviews, I sometimes felt pressure not to ask questions in the 'wrong' way or feared that the conversation would shift onto topics where I would not be able to ask effective follow-up questions. Although participants generally engaged with the substance of my

questions, it may be that I did not always probe their answers as fully as I might have done if I had felt more comfortable with the subject matter of the interviews.

5.8.3 Analysis and interpretation of data

The literature has often suggested that outsider researchers bring greater objectivity to the analysis and interpretation of data (Breen, 2007; Mercer, 2006; Oliver, 2020; Unluer, 2012). However, outsider researchers are not immune to the influence of personal perspectives (Dwyer & Buckle, 2009). All researchers, especially those using qualitative research methods, need close awareness of how personal biases and perspectives may affect their work (Altheide & Johnson, 2011; Breen, 2007). Studies completed by insider researchers particularly need to consider the credibility and dependability of their analysis (Altheide & Johnson, 2011; Breen, 2007). It is possible that my own knowledge of CfE, and education policy generally, may have influenced my analysis and interpretation of the data I collected. Although I did not feel like I had preconceived ideas about what the study would find (Fleming, 2018; Oliver, 2020) - I did undertake several steps to ensure it was as credible as possible.

Firstly, I planned the analysis carefully to ensure that all stages were rigorous and well documented. I have aimed to explain my process of research and analysis as clearly as possible within this thesis, including sharing details of codes, categories, and search terms used for the analysis of curriculum policy texts. As discussed above, when it came to the final, more theoretical stage of analysis I particularly hoped that using Archer's (1995) work to recontextualise the data would help to "make the familiar strange" (Hockey, 1993, cited in Fleming, 2018). Secondly, through using analytic memos during the analysis of the interview data (also discussed above) I aimed to build increased reflection into the study. These memos provided a structured way of recording and reflecting on my own views about the data analysis and findings as the research progressed (Dwyer & Buckle, 2009). Thirdly, I used my supervisors as an important external reference point during the process of data analysis.

As highlighted in the discussion above, I have ultimately found it difficult to position myself as either an 'insider' or an 'outsider' researcher (Breen, 2007; Mercer, 2006). Instead, the idea of a continuum from insider to outsider feels most relevant (Hellawell, 2006; Mercer, 2006). This framing envisages the researcher being placed at different

points between the twin poles of insider and outsider at different stages of the research, or even from interview to interview (Hellawell, 2006). In line with Critical Realism's ontological position, I need to accept that my own interpretations of the data I collected are themselves "second-order constructs" which are made with their own specific "social/ cultural/historical contexts" (Altheide & Johnson, 2011, p. 588). Therefore, in common with all research designs which incorporate qualitative methods, I am certain that the study would have looked very different if another researcher had undertaken it. I am less able to qualify what difference my having a range of 'insider' characteristics made to the study. Although my status as an insider may have helped me gain access to participants and new information, I would not claim to have produced an insider account of complex processes of policy development and change over an extended period.

5.9 Conclusion

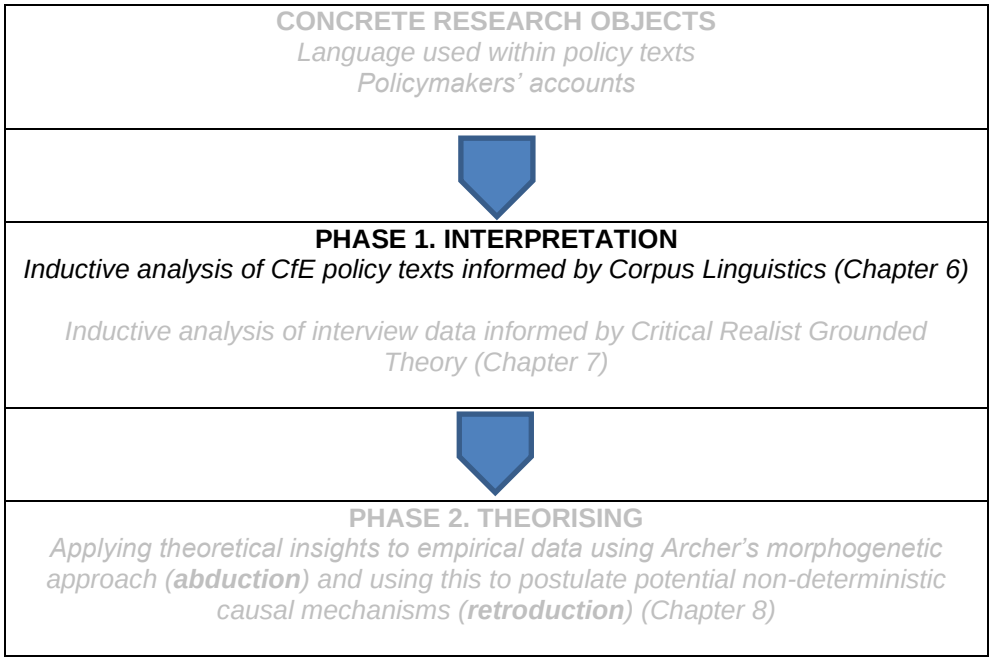
In chapter 5, I have outlined the stages of thinking through my research study, beginning with my overall ontological and epistemological position and then explaining the choices I made about how to gather and analyse my data. My adoption of a Critical Realist stance informed a mixed methods research design, which aimed to complement individual accounts with a detailed analysis of Curriculum for Excellence (CfE) policy texts informed by Corpus Linguistics. I hoped that this dataset would provide a solid basis for identifying potential social mechanisms. Critical Realism also informed my overall approach to designing semi-structured interviews which were as open as possible to participants' own perspectives. The sections on ethical considerations and my own role as an 'insider' researcher are closely connected - with my previous knowledge of many interviewees influencing the choices I made about how to contact them and hold the interviews. I also drew heavily on Critical Realism in informing the overall design of my analytical strategy - which contained an initial 'theorising' phase that was focused on inductively exploring my data followed by a second 'theorising' phase. In this second phase of analysis, I have explained how I drew on Margaret Archer's morphogenetic approach to undertake a theoretically driven exploration of my data. This operationalised Critical Realism's distinct explanatory logics of abduction and retroduction. In chapters 6, 7, and 8 I will now go on to present the results of these sequential stages of analysis, starting with that of the CfE policy texts.

Chapter 6 - Findings: analysis of curriculum policy texts

6.1 Introduction

Chapter 6 is the first of three findings chapters within this thesis. It focuses on the Corpus Linguistics-informed data analysis of Curriculum for Excellence (CfE) policy texts. Figure 10 provides a reminder of how this stage of analysis fits within the wider analytical strategy used for this study - which I first outlined in the previous chapter.

Figure 10: How corpus analysis fits within the wider analytical strategy



Based on: Crinson (2007); Fletcher (2017)

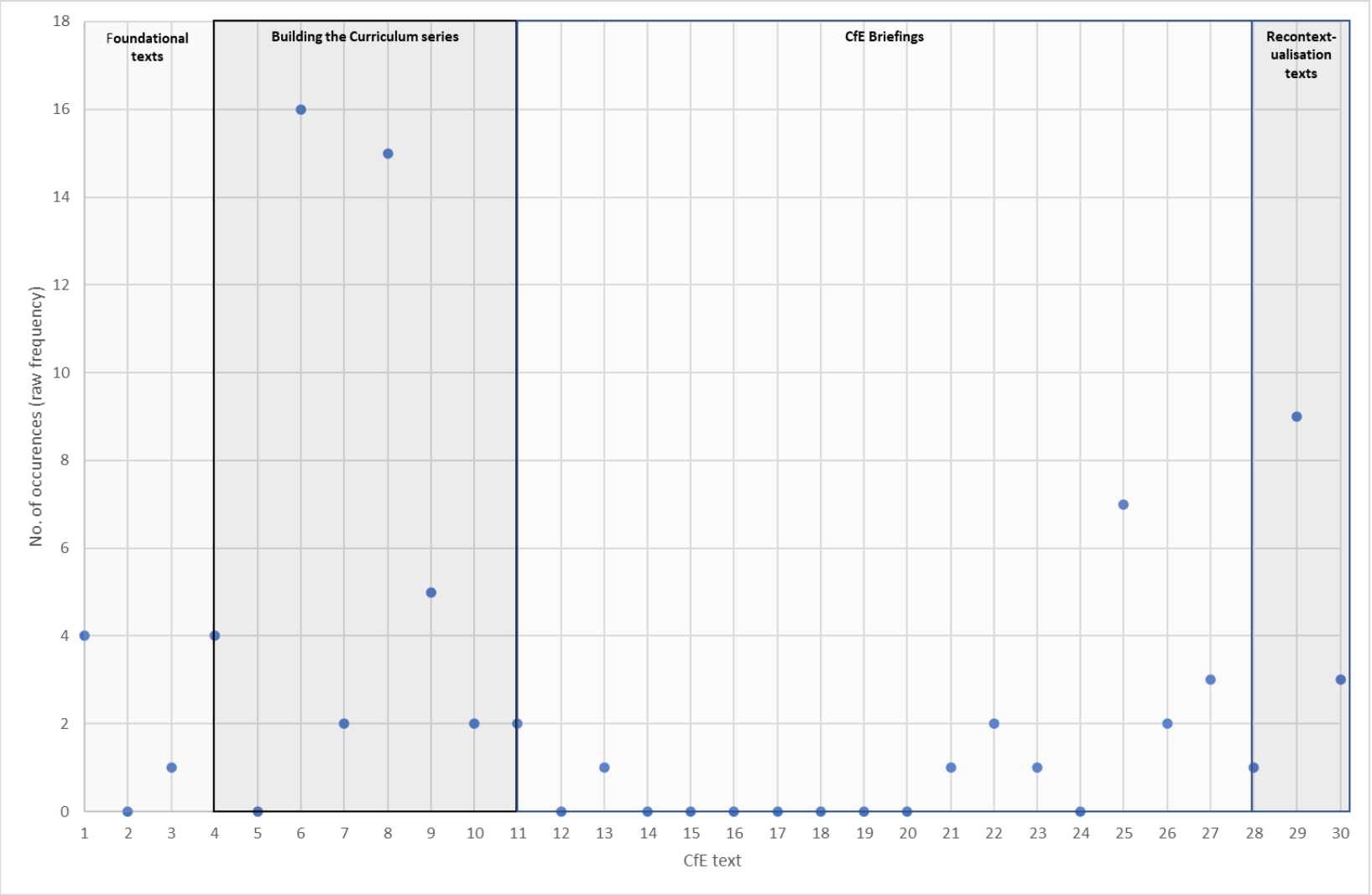
The analysis discussed in this chapter fits within the 'interpretation' phase, during which I took a largely inductive approach to exploring the data generated from the CfE policy texts and the interviews with policymakers. During the later 'theorising' phase, I applied Archer's (1995) morphogenetic approach to both sets of analysis to identify more fully the cultural and structural factors which could help to explain potential explanatory mechanisms. Section 5.7.2 above described in full the ways in which I identified and analysed the CfE policy texts discussed within this chapter. However, I provide several reminders of my overall approach to the analysis below. I first provide an overview of the distribution of a set of social justice-related terms, which were the focus of my analysis, across the CfE policy texts. I then summarise a more detailed analysis of how

clusters of these terms were used within the policy texts. Finally, I discuss a similar analysis focused on the term ‘knowledge’, which, as noted in chapter 3, relates strongly to a curriculum’s technical form, and has social justice implications.

6.2. Distribution of social justice terms within the policy texts

Chapter 5 has outlined that the Corpus Linguistics-informed analysis focused on 30 policy texts published between 2004 and 2016, which I had identified as making up national ‘guidance’ on Curriculum for Excellence (CfE). As noted above, Appendix F provides a complete overview of each of the 30 texts. I grouped these 30 texts into four sub-categories corresponding to the period in which they had been produced. As noted in chapter 5, during the first stage of analysis I used the WordSmith Tools software package to explore a group of social justice-related terms (informed by the literature considered in chapter 2) within the 30 policy texts. These included ‘equity’, ‘equality’, and ‘justice’. In total, I identified 81 instances of these terms across the CfE policy texts, which themselves totalled 124,028 words (excluding material removed through applying the mark-up process described in chapter 5). Figure 11 on the next page plots the raw frequencies of the equity-related terms across the 30 individual policy texts (each text is given a number from 1-30 for readability, with the Figure also showing which of the four sub-categories each text is part of).

Figure 11: Distribution of social justice-related terms across the 30 policy texts (raw frequencies)



As shown in Figure 11, a total of 21 texts either did not use the social justice-related terms at all (11 texts) or contained only one or two instances of them (10 texts). Of the other nine texts, only four used the terms more than six times. These were:

- *Building the curriculum 3 - A framework for learning and teaching* (Scottish Government, 2008b);
- *Building the curriculum 5 - A framework for assessment* (Scottish Government, 2011);
- *CfE Briefing 14: Curriculum for Excellence - Political Literacy* (Education Scotland, 2013); and
- *Delivering excellence and equity in Scottish education - A delivery plan for Scotland* (Scottish Government, 2016).

These four texts came from each of the sub-categories of text, apart from the 'foundational texts' produced from 2004-06.

As noted in chapter 5, it was important to normalise the raw frequencies for the social justice-related terms, since the four different sub-categories of CfE texts contained different numbers of words. Table 7 below shows the normalised frequencies of the terms within each of the four sub-categories.

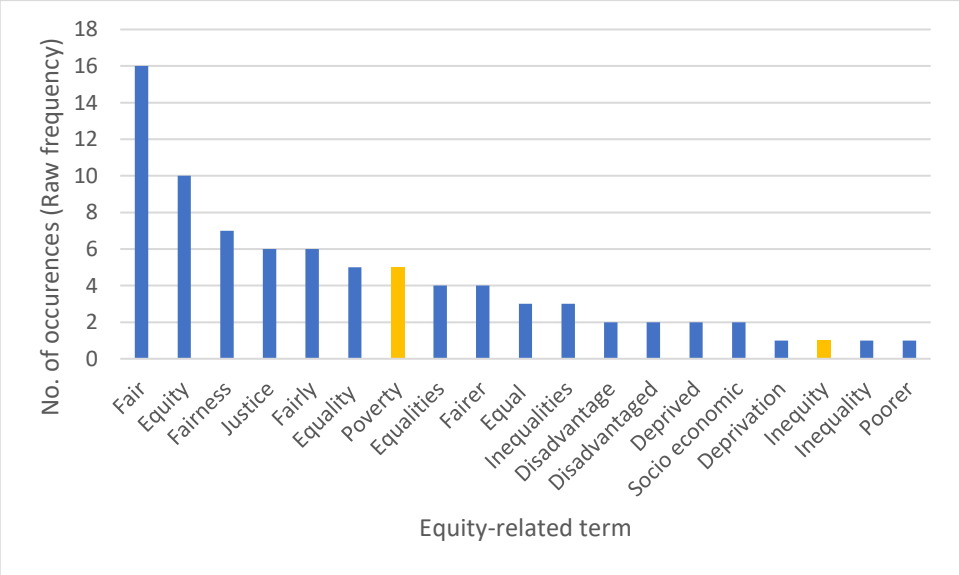
Table 7: Normalised frequencies of social justice-related terms by text sub-category

	CfE text sub-category			
	Foundational texts (2004-06)	**Building the Curriculum series (2006-11)**	**CfE Briefings (2012-15)**	**Re-prioritisation texts (2015-16)**
Raw frequencies of social justice-related terms used in text sub-category	5	46	18	12
Number of words in text sub-category	11,420	75,345	32,960	4,303
Normalised frequencies of social justice-related terms used in text sub-category (per 1,000 words)	**0.44**	**0.61**	**0.55**	**2.79**

As shown in Table 7, while the social justice-related terms had broadly similar normalised frequencies within the first three sub-categories - representing those texts produced between 2004 and 2015 - the terms were almost five times as frequent within the two 're-prioritisation' texts from 2016 (Education Scotland, 2016a; Scottish Government, 2016). This indicates that there was an increase in the number of explicit references to social justice in the two most recently published policy texts.

Figure 12 below shows how the 81 instances of the individual social justice-related terms were distributed across the entire collection of texts.

Figure 12: Distribution of social justice-related terms across the policy texts



The two terms highlighted in orange above ('poverty' and 'inequity') were negated by their surrounding text. For instance, there was a commitment to "…reduce poverty…" within one of the policy texts (Scottish Executive, 2004a). None of the other terms were negated by their co-text.

6.3 Exploration of clusters of social justice-related terms

Chapter 5 noted that, as several terms related to the same broad principles (i.e. 'equity' and 'inequity' or 'fair', 'fairness', 'fairly' and 'fairer'), I undertook a more detailed analysis of how clusters of terms were used within the Curriculum for Excellence (CfE) policy texts. I grouped the individual terms into seven clusters, as shown in Table 8 below.

Table 8: Thematic grouping of social justice-related terms

Cluster	Total number of instances	Individual term	Number of instances
Fairness	33	Fair	16
		Fairness	7
		Fairly	6
		Fairer	4
Equality	16	Equality	5
		Equalities	4
		Equal	3
		Inequalities	3
		Inequality	1
Equity	11	Equity	10
		Inequity	1
Poverty	8	Poverty	5
		Socio-economic	2
		Poorer	1
Justice	6	Justice	6
Disadvantage	4	Disadvantage	2
		Disadvantaged	2
Deprivation	3	Deprived	2
		Deprivation	1

These clusters proved more helpful in identifying how the terms were used than the raw frequencies. For instance, the individual term ‘equity’ was used twice as frequently as ‘equality’, however the cluster of terms related to ‘equality’ was used more frequently overall.

As noted in chapter 5, I explored how each cluster of terms had been used within the CfE policy texts using the ‘Concordance’ feature within WordSmith Tools. This function brings together all examples of a word or phrase with its corresponding co-text (known as concordance lines). The following sub-sections discuss how each cluster of terms tended to be used within these concordance lines.

6.3.1 Terms clustered around ‘fairness’

The most frequently used cluster of terms within the CfE policy texts related to ‘fairness’. The concordance lines for these terms tended to relate strongly to assessment practice. For instance, all but three of the 16 uses of the adjective ‘fair’ related to assessment. Similarly, three of the six instances of the adverb ‘fairly’ modified the verb ‘apply’ or ‘applied’, again within the context of assessment. The following sample concordance lines exemplify the strong links between the terms related to ‘fairness’ and assessment practice.

> *"Assessment approaches have to avoid pre-conceptions and stereotypes and be **fair** to all involved: to children and young people, their families and communities".* (Scottish Government, 2011)

> *"Where assessment is for high stakes qualifications and certification, particular safeguards are required to guarantee **fairness** to all young people and to provide confidence to parents, colleges, universities and employers".* (Scottish Government, 2011)

> *As part of planning, staff should build in opportunities to discuss and share assessment approaches and expectations with colleagues to ensure their appropriateness for the intended outcome (validity) and that they are **fairly** and consistently applied for all learners (reliability).* (Scottish Government, 2011)

6.3.2 Terms clustered around 'equality'

Those terms clustered around 'equality' were the second most frequently used across the CfE policy texts. Closer examination of these concordance lines highlighted that these terms tended to be used in relation to the intended educational outcomes that children and young people achieve through their learning. The terms clustered around 'equality' did not appear to be linked specifically to wider issues of social justice. Therefore, these terms were not used to suggest that realising 'equality' (e.g. of outcomes) for groups of learners was an overall principle which the curriculum *itself* should seek to achieve. The concordance lines below illustrate how the terms clustered around 'equality' tended to be used.

> *"Children and young people need to learn to respect and value other people and to develop an understanding of their beliefs and feelings. This will help them to develop positive relationships, promote **equality** and fairness and counter discrimination".* (Scottish Executive 2006b - section focused on Health and Wellbeing within CfE)

> *"Effective RO* [Religious Observance] *can allow learners to address issues of **equality**, for example by developing respect for the beliefs and values of others as well as by developing empathy with a wide variety of perspectives".* (Education Scotland, 2014)

6.3.3 Terms clustered around 'equity'

The terms clustered around 'equity', in contrast to those clustered around 'equality', were much more strongly linked to social justice and to children and young people's socio-economic status. The following three concordance lines illustrate how the term 'equity' was used in this way.

> *"The OECD report Quality and **Equity** of Schooling in Scotland raises challenges for Scottish education - the need to address underachievement and to provide more choices and more chances for all our children and young people, particularly those from disadvantaged socio-economic backgrounds".* (Scottish Government, 2008b)

> *"[…] through improved learner engagement, we will be able to raise levels of achievement for all children and young people, while ensuring they are safe, healthy, nurtured, active, respected and included and thereby narrow the achievement gap, resulting in **equity**".* (Scottish Government, 2011)

> *"Crucially, it sets out a clear vision for Scottish Education: […] Achieving **equity**: ensuring every child has the same opportunity to succeed, with a particular focus on closing the poverty-related attainment gap".* (Scottish Government, 2016)

There was evidence of a change in emphasis over time within the 'equity' concordance lines. This can be seen in the three concordance lines presented above. The first two concordance lines both refer to the concept of achievement - first framed negatively as "underachievement", then conceptualised in relation to an "achievement gap". In contrast, the third concordance line conceptualises equity in relation to an "attainment gap". Therefore, there is a shift from *addressing underachievement* in 2008, to *narrowing* an *achievement* gap in 2011, to *closing* an *attainment* gap in 2016. Within the Scottish context, achievement and attainment have distinct meanings. Attainment typically relates to performance in formal tests or examinations, while achievement typically has a broader meaning, relating to activities such as sport, volunteering, fundraising, or mentoring (Scottish Qualifications Authority, 2022). The first two concordance lines above appear to align with this wider understanding of achievement. For instance, language such as "more choices and more chances" and "safe, healthy, nurtured, active, respected and included" do not appear to have a narrow focus on examination performance. However, the concept of an "attainment gap" in the third concordance line appears to relate much more strongly to examination or test performance. Therefore, in these three concordance lines there appears to be a shift in the meaning of 'equity' from a focus on participation and a wider range of valued outcomes, to an emphasis on assessed performance.

It is worthy of note that six of the 10 concordance lines featuring the term 'equity' related to the title of a single publication: *Quality and equity of schooling in Scotland* (OECD, 2007). As noted in Chapter 4, this publication, commissioned by the Scottish Executive in 2006, presented the results of a detailed country analysis of the Scottish education system, carried out by the OECD. All but one of the concordance lines referring to this

publication came from a single policy text - *Curriculum for Excellence: Building the curriculum 3: A framework for learning and teaching* (Scottish Government, 2008b). The term 'equity' itself, or any other forms such as 'equitable' or 'equitably', did not appear in any policy texts published before 2008. This suggests that the OECD's work may have been particularly influential in introducing the term 'equity' within Scottish curriculum policy texts.

6.3.4 Terms clustered around 'poverty'

As may be expected, those terms clustered around 'poverty' were also strongly linked to social justice and socio-economic status. As with those terms clustered around 'equity', there also appeared to be a shift in how terms related to 'poverty' were used within the CfE policy texts. The following three concordance lines illustrate this shift well.

> *"These include global social, political and economic changes, and the particular challenges facing Scotland: the need to increase the economic performance of the nation; reflect its growing diversity; improve health; and reduce* ***poverty****".* (Scottish Executive, 2004a)

> *"Children from poorer communities and low socio-economic status homes are more likely than others to underachieve, while the gap associated with* ***poverty*** *and deprivation in local government areas appears to be very wide".* (Scottish Government, 2008b)

> *"Curriculum for Excellence (CfE) aims to raise standards, to close the (****poverty****-related) attainment gap, and to prepare children and young people for their future".* (Education Scotland, 2016a)

These concordance lines appear to show 'poverty' moving from being framed as a wider social problem, whose links to the education system are unspecified, to a topic which the education system in general, and the curriculum in particular, have a responsibility to address. In the first concordance line, from 2004, "poverty" is presented as a challenge facing Scotland as a whole. By 2008 "poverty" has been linked to a "gap" related to educational underachievement. Therefore, the term has clearly moved into the education sphere. Moving forward to 2016, the link between "poverty" and "attainment" has become more clearly established, along with the policy aim that the "poverty-related attainment gap" is one that needs to be closed, and that this is one of the purposes of CfE. It is also interesting to note that 'poverty' has shifted from being used as a noun in the first concordance line to being used as an adjective in the third - to describe an "attainment

gap". Again, this suggests that increased emphasis is being placed on the role of the education system in addressing the *effects* of socio-economic disadvantage.

6.3.5 'Justice', and terms clustered around 'disadvantage' and 'deprivation'

As shown in Table 10 above, there were no other terms clustered around 'justice' within the CfE policy texts. 'Justice' was used in a very specific way - to refer to one of CfE's four values. As noted in chapter 4, the Curriculum Review Group suggested that CfE should aim to develop four values in children and young people - one of which was justice. These four values are the same as those engraved on the mace of the Scottish Parliament (Education Scotland, 2013; Scottish Parliament, 2021). The following concordance line illustrates how 'justice' was used.

> *"The Scottish approach to the curriculum is values based. Wisdom, **justice**, compassion and integrity define the values for Scottish society". (Education Scotland, 2016a)*

Finally, the terms clustered around 'disadvantage' and 'deprivation' were the least frequently used across the 30 CfE policy texts. Due to their overall low frequency, I found it more challenging to identify any clear patterns in how they were used. These terms were all strongly related to social justice and considerations of socio-economic status. They tended to be used in more recent CfE policy texts, particularly those published after 2015.

6.4 Analysis of 'knowledge' within the policy texts

As discussed in chapter 5, I also explored how the term 'knowledge' was used within the collection of Curriculum for Excellence (CfE) policy texts - using the same approach as for the social justice-related terms. It was important to consider this term due to the emphasis that the recent literature has placed on the role of knowledge as an important indicator of a curriculum's approach to input regulation. In addition, chapter 4 recognised that there have been important social realist critiques of approaches to curriculum input deregulation, due to the risks of downgrading knowledge which is likely to be particularly important for those from disadvantaged backgrounds.

The term 'knowledge' occurred 168 times in total within the texts, indicating that they did explicitly consider knowledge more frequently than any of the social justice-related

terms. The normalised frequencies for 'knowledge' within each of the four text sub-categories are shown in Table 9 below.

Table 9: Raw and normalised frequencies of 'knowledge' by text sub-category

	CfE text sub-category			
	Foundational texts (2004-06)	**Building the Curriculum series (2006-11)**	**CfE Briefings (2012-15)**	**Re-prioritisation texts (2015-16)**
Raw frequencies of 'knowledge' used in text sub-category	13	106	48	1
Number of words in text sub-category	11,420	75,345	32,960	4,303
Normalised frequencies of 'knowledge' used in text sub-category (per 1,000 words)	**1.14**	**1.41**	**1.46**	**0.23**

As shown in Table 9, the two texts within the 're-prioritisation' sub-category have a much lower normalised frequency for 'knowledge' than the other three sub-categories. In contrast to the social justice-related terms discussed above, this suggests that the two more recent policy texts had a less explicit focus on knowledge, when compared with earlier CfE policy texts. There was also a slightly higher normalised frequency for the texts within the 'Building the Curriculum' and 'CfE Briefing' sub-categories than within the 'Foundational' sub-category, indicating that there was a slightly stronger emphasis on knowledge in texts published between 2006 and 2015. This could be explained by the fact that the 'Foundational' texts focused more heavily on CfE's overall rationale, purposes, values, and principles, rather than on detailed knowledge questions.

I then explored the concordance lines for knowledge, in the same way as for the social justice-related terms. This analysis indicated that 'knowledge' tended to be used alongside other kinds of curriculum outcomes. These comprised 'skills', 'understanding', 'attributes', and 'capabilities'. Of the 168 concordance lines containing 'knowledge', 76 also included one or more of these other terms, as illustrated below.

> *"Curriculum for Excellence focuses on a broader range of* ***knowledge*** *and understanding, skills, attributes and capabilities that children and young people develop in a range of contexts".* (Scottish Government, 2011)

> *"How well does the S3 experience provide motivating and challenging learning that continues to develop **knowledge** and understanding, skills (including higher-order thinking skills), and the attributes and capabilities of the four capacities?"* (Education Scotland, 2012)

While clearly signalling that knowledge was one of the intended outcomes of CfE, this 'bundling' of knowledge with a range of other curriculum outcomes suggests that it did not have prime importance.

A total of 38 out of the 168 concordance lines made some mention of disciplinary knowledge. It is important to note that the more detailed statements of curriculum knowledge within CfE, set out in its experiences and outcomes, were not included within the analysis of policy texts. This is because they were published in response to agreed CfE policy, for instance reflecting the curriculum principles identified by the Curriculum Review Group, as opposed to setting out a policy direction in themselves. Despite this, it could be expected that the 30 CfE policy texts that were included in the analysis may have provided, for instance, a rationale for selecting such areas of curriculum content. However, in the concordance lines disciplinary knowledge was again often not clearly distinguished from other curriculum learning outcomes, such as 'understanding' or 'skills'. Therefore, although several specific areas of disciplinary knowledge are mentioned within the texts, it was often challenging to define specifically how 'knowledge' was being used in context. The following concordance lines illustrate this.

> *"Through these experiences and activities they can develop important skills to become enterprising and creative adults in a world where the skills and **knowledge** of science are needed across all sectors of the economy*". (Scottish Executive, 2006a)

> *"Classical languages will cover translating/interpreting texts and **knowledge** about language".* (Scottish Executive, 2006a)

> *"As young people progress, learning and teaching approaches should promote classroom talk, group discussion and debate - including about the benefits and risks associated with the applications of scientific **knowledge**".* (Scottish Executive, 2006a)

Other framings of 'knowledge' within the 168 concordance lines also referred to the assessment of knowledge (20 lines), teachers' professional knowledge (12 lines), and knowledge being applied or used in various ways (8 lines). The following concordance lines illustrate these themes.

> *"Carefully-planned interdisciplinary learning provides good opportunities to promote deeper understanding by applying* ***knowledge*** *and understanding and skills in new situations and taking on new challenges".* (Scottish Government, 2011)

> *"Assessment should give learners the opportunity to demonstrate aspects of learning where they have a depth of* ***knowledge*** *and understanding and skills".* (Scottish Government, 2011)

6.5 Conclusion

Chapter 6 has described the findings generated from the first stage of analysis. Based on this analysis, the following initial conclusions can be reached. Firstly, there was evidence that social justice was explicitly considered within the Curriculum for Excellence (CfE) policy texts. However, this took place to a very limited extent and was not consistent across the texts. There was also evidence that the specific term 'equity' was not used before 2008, and that its introduction had been influenced by the findings of the OECD's 2007 review of Scottish education. Secondly, there was evidence of an increased focus on social justice as a valid concern for curriculum policy in the CfE texts published after 2016, indicating a change in the importance of this topic to policymakers. These more recent texts also appeared to have introduced a new framing of 'equity', which focused much more on measured performance in tests and examinations. Thirdly, a lack of clarity about the specific contribution of the term 'knowledge' to CfE was apparent within the policy texts. The term tended to be 'bundled' with a range of other curriculum outcomes such as 'skills' and 'attributes'. In addition, the role of disciplinary content knowledge within CfE did not appear to be well developed. This is an interesting finding in relation to the social realist critiques of the new curriculum frameworks that were described in chapter 3 - suggesting that CfE policy did not accompany its focus on curriculum input deregulation with a clear stance on the role of knowledge.

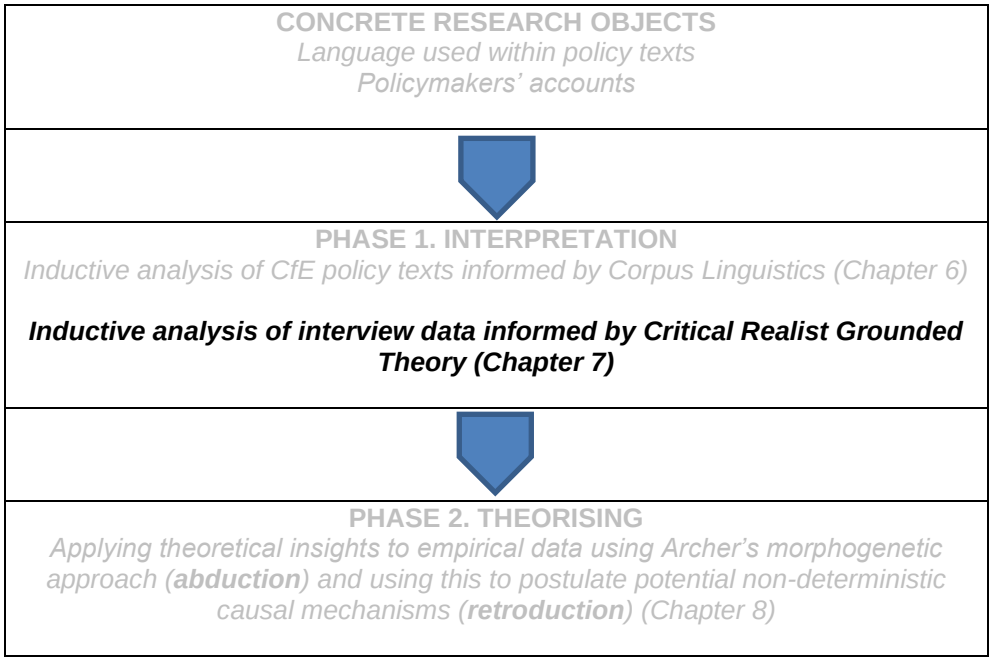
I will return to these conclusions at the end of chapter 7, after presenting the results of my analysis of the interview data. At this point, it will be possible to reflect both on the implications of the technical form of CfE for the principle of equity - largely based on the interview data - and what its policy texts explicitly say about this principle - to which the data presented in this chapter make an important contribution.

Chapter 7 - Findings: policymaker interviews

7.1 Introduction

Chapter 7 is the second of the three findings chapters within this thesis. In it, I summarise the findings from my analysis of the 15 qualitative interviews with policymakers who had been involved with Curriculum for Excellence (CfE) since its inception. Figure 13 below provides a further reminder of how the analysis described within this chapter aligns with the overall analytical strategy I used for the study.

Figure 13: How interview data analysis fits within the wider analytical strategy



Based on: Crinson (2007); Fletcher (2017)

The analysis described below is the second element of the 'interpretation' phase of data analysis, following on from the Corpus Linguistics-informed analysis of CfE policy texts described in chapter 6. As I noted at the beginning of chapter 6, both sets of data analysis within the 'interpretation' phase took a largely inductive approach. In the case of the data presented in this chapter, the discussion is informed by the 76 codes generated from the analysis described fully in chapter 5 (and contained in Appendix H). The later 'theorising' phase, which I describe in chapter 8, then goes on to apply Archer's (1995) morphogenetic approach to these two sets of analysis.

Section 7.2 below provides a summary of the 15 interviewees, including their professional roles and the period of their involvement with CfE. The rest of the chapter is structured into two broad sections - which are informed by the literature considered in chapters 2 and 3. Chapter 2 reflected on the concept of 'educational equity', while chapter 3 considered how the principle of equity might relate to curriculum policy, with a specific focus on curriculum regulation. Chapters 2 and 3 collectively suggested that the technical form (Luke et al., 2012) of a curriculum - in particular its approach to input and output regulation - has strong implications for the extent to which equity - defined as equitable individualisation in response to characteristics or needs - (Schaffer & Lamb, 1981) - can be realised. These chapters further suggested that the implications of a curriculum's technical form for realising equitable individualisation may differ from its stated goals in relation to 'equity'. Reflecting these chapters, section 7.3 below focuses on the extent to which CfE policy had an explicit focus on 'equity'. Section 7.4 then presents data relating to input and output regulation, and curriculum knowledge. Within both sections 7.3 and 7.4, I take a chronological approach that aims to draw attention to change over time. In section 7.5, I then discuss the data presented in both chapters 6 and 7 alongside the literature considered earlier within the thesis.

7.2 Summary of interviewees

Table 10 below provides a summary of the 15 interviewees, the organisations they worked for during their involvement with Curriculum for Excellence (CfE) policy and the approximate main period of their involvement, aligned to the terms of the Scottish Parliament outlined in chapter 4. To protect interviewees' anonymity, no information about their professional roles has been given. However, as noted in chapter 5, they all had senior roles within their organisations.

Table 10: Summary of interviewees' organisations and main period of involvement with Curriculum for Excellence

Interviewee	Scottish Parliamentary Terms				
	1999-2003	2003-07	2007-11	2011-16	2016-21
1	Curriculum Review Group				
2			Scottish Government		
3		Her Majesty's Inspectorate of Education/ Education Scotland			
4		Her Majesty's Inspectorate of Education/ Education Scotland			
5		Learning and Teaching Scotland/ Education Scotland			
6		Her Majesty's Inspectorate of Education/ Education Scotland			
7		Learning and Teaching Scotland/ Education Scotland			
8		Her Majesty's Inspectorate of Education			
9		Her Majesty's Inspectorate of Education			
10			Scottish Government		
11	Curriculum Review Group				
12	Curriculum Review Group				
13					Education Scotland
14				Education Scotland	
15			Her Majesty's Inspectorate of Education/ Education Scotland		

7.3 Explicit consideration of equity within Curriculum for Excellence policy

7.3.1 The National Debate, 2002-03

Section 7.3 focuses on the extent to which equity was an explicit focus for Curriculum for Excellence (CfE) policymaking. It begins with the National Debate on Scottish Education, which, as noted in chapter 4, was a large-scale consultation exercise on education policy priorities held in 2002-03. Three interviewees (1, 11, 12), who were all members of the Curriculum Review Group (which went on to develop CfE's values, principles, and purposes), and so were well-informed about the Debate, reflected on

whether equity emerged as part of its findings. Interviewee 1 could not recall any specific references to equity (or equality) within the Debate's findings, but commented:

> *"It must of course have been mentioned".* (Interviewee 1)

Interviewee 12 stated that:

> *"[…] it seems to me that the National Debate on Education took a broad definition of equity, in terms of wanting to see an inclusive education system, including an inclusive curriculum model, that it recognised the wide range and, if you like, grasp of education […]".* (Interviewee 12)

Interviewee 11 had a clearer recollection of how extensively equity or equality had emerged as themes during the Debate.

> *"[…] I think the main thing that emerged from the National Debate was the belief in comprehensive education and the trust in teachers, that came through incredibly strongly. […] and there was some worry about… from the National Debate… about people not getting a fair chance, there was a divide, […] that was less clear cut than the other things I've mentioned, but I can remember there* [were some views that an inclusive curriculum was not required for all] *and there were others who were talking about, "No, we need a more supportive, encouraging environment"".* (Interviewee 11)

Therefore, it was not clear that equity was a specific theme which emerged from the National Debate, however, there did appear to be some findings that were broadly related to inclusion.

7.3.2 The Curriculum Review Group, 2003-04

As noted in chapter 4, the Curriculum Review Group was made up of representatives from central and local government, national agencies, higher and further education institutions, schools, and parent groups. It was in existence between November 2003 and November 2004. Interviewees considered the extent to which equity was a significant consideration at this point in CfE's development. Interviewee 4, who had been more heavily involved with CfE policy in the 2010s, and therefore had a retrospective view, felt that the Curriculum Review Group had had an explicit focus on equity.

> *"[…] well I'm sure it* [equity and inclusion] *was definitely explicitly understood by the original Review Group […] for example, certainly had it very explicitly on its agenda, […] it was certainly on the agenda very strongly, and also of course the curriculum included everything from preschool to college principal and*

> *school heads, and yes it was a topic much talked about in the original Review Group […]".* (Interviewee 4)

However, other interviewees, including those who had been members of the Curriculum Review Group, had more mixed recollections of the extent to which equity was a significant element of its thinking. For instance, Interviewee 1 clearly stated that equity had not been significant.

> *"[…] considerations of equity and equality were not significant in the discussions of the Review Group. The Review Group was charged with taking into account the conclusions of the Debate and it had the responsibility of recommending principles on which a future curriculum should be based, not of recommending a curriculum, just the principles. So in effect what it did was come up with four purposes for education […], to which it attached the ugly piece of jargon capacities, and seven curriculum principles. There were also three values that […] were taken from the mace of the Scottish Parliament, which did indeed I think have some tangential relevance to equity, but in effect that bit of the report is just waffle. The bits that count were the four purposes and the seven curriculum principles".* (Interviewee 1)

Interestingly, Interviewee 12 had a different recollection of the importance of CfE's values, however they also emphasised that the values had not been part of the Group's discussions from the outset.

> *"And you know how the four values on the Mace are now central, well when do you think that came into consideration? About halfway through is the answer, it wasn't a case of starting and saying, "This is a new democratic structure within Scotland, what are our democratic values?". We came to them probably about halfway through consideration, and again there is the irony of course that there is a belief that these values were largely determined by […] the silversmith who made the Mace. I do think they worked very well".* (Interviewee 12)

Three interviewees (9, 11, and 12) agreed with Interviewee 1 that the Curriculum Review Group had not considered equity explicitly, as a possible curriculum principle. However, in contrast to Interviewee 1, they did emphasise that there had been an implicit focus on social justice more generally. The following extracts reflect these interviewees' recollections.

> *"[…] the things that we've talked about, to do with the curriculum for all, and all of those things, would have had no dissenters round the table, particularly, although there might have been one or two who felt that we needed to be careful not to expect too much of some children and that, you know, maybe it would hold other children back, if we had a curriculum for all, so there was a little bit of that, but I think mostly there would have been agreement that when we'd said a curriculum for all that we were serious about that, and the consequences of that*

for how the curriculum should be shaped and how it should be implemented, yeah I think they would have been fairly unanimous about that […]". (Interviewee 9)

"[…] there was certainly talk about, if we had this general curriculum, you know, general-level principles, how could we ensure that people weren't disadvantaged, […]and that's why we […] came up with experiences, we thought that that was really important. We tried to think about how these principles would be interpreted and any malign effects of them […] that they would lead to greater segregation, […] But we didn't have seminars on what is the meaning of equity or equality or anything like that. It was very practical […]". (Interviewee 11)

"[…] there is comparatively little reference to […] literacy and numeracy and the achievement gap; in fact that phrase I did not see used; nor was it one that played a key role, I think, in our discussions within the Curriculum Review Group; when we thought about equity and social justice, we did it in terms of an inclusive education system that would recognise the rights of all to a full education, and that education would be broadly defined". (Interviewee 12)

Therefore, the work of the Curriculum Review Group - like interpretations of the National Debate on Scottish Education - appears to have had a broad focus on inclusion. However, the principle of equity does not appear to have been one that the Group considered in detail.

7.3.3 CfE policy development, 2004-14

Specific consideration of equity

The interviews did not generate a large amount of data about the extent to which equity was an explicit focus for policymaking from 2004 to 2007. Interviewees 1, 11, and 12, who had all been members of the Curriculum Review Group, emphasised that they did not recall considerations of equity having been a strong focus during the phase of CfE policy development that followed their work. However, it is important to note that not all these interviewees were directly involved in this subsequent stage of policy development.

All 15 interviewees expressed views about the extent to which CfE policy in the 2007 to 2014 period had had an explicit focus on equity. Again, participants had mixed views about the extent to which this principle had been an explicit driver of CfE policy at this time. Three interviewees (1, 2, and 15) did not feel that equity had been a particularly strong driver of CfE policy - as illustrated below.

"[…] my overall perception of this is that equity has come to be the crucial concept in the present government's educational thinking. And I think that is post-

> [Nicola] *Sturgeon* [the current First Minister of Scotland] *and is therefore ten years later than the design of Curriculum for Excellence".* (Interviewee 1)

> *"And I'm afraid to say I don't recall any concerns around equity, other than the fairly ritualistic concerns around achievement at qualification level, and how in particular care leavers were […] doing, you know it was a fair point, if you measured their performance solely on exams".* (Interviewee 2)

> *"I think that the term equity has been more recent, it's probably been more equality, and then when equity became the hip, cool and trendy thing […] there has been a lot of retro-fitting in terms of policy competition, if you like, in a way that I don't think it's been particularly helpful, because the two are so interchangeable and fuzzy".* (Interviewee 15)

An alternative viewpoint, which was expressed by the remaining 12 interviewees, was that a focus on equity had been present within CfE policymaking during the 2007 to 2014 period, although several interviewees did acknowledge that this specific term may not have been used. The following extracts illustrate these interviewees' perspectives.

> *"Curriculum for Excellence right from its early design sets that* [equity] *as an objective to reduce the impact of social background effectively, that was clearly in the intentions of Curriculum for Excellence right from the start […]".* (Interviewee 4)

> *"[…] equality* [within CfE] *from the start, equity, without using that word, from the start, in that schools could be more flexible in designing their own curriculum to meet the needs of their learners, which to my mind is equity […] So that in itself, we would now call equity. Whether or not that term was used at that point or not, I honestly don't recall it being used […] I don't think it had a profile, and certainly I've done a lot of presentations on CfE and I've talked about all these concepts, I didn't start using the word equity until the kind of equity challenge, 2014, 15 type of thing.* (Interviewee 6)

> *"Well I mean it was taken as a given, you know, there was no question about it in terms of the way the curriculum was developed […] that this in any way would compromise the policy commitment to equity that was very strong, so that was a… it wasn't a new driver, that was just a given, if you like, in the process. But […] a test of what came out of the work on the curriculum would be whether or not, inadvertently, it compromised the broader policy commitment to equity".* (Interviewee 8)

'A curriculum for all'

A particularly strong theme in the interview data about CfE's early policy development was the intention that it would be a curriculum for all learners. Section 7.3.2 has already shown that this policy goal had been present at the time of the Curriculum Review Group. Seven interviewees (4, 5, 6, 7, 8, 9, and 15) pointed to several dimensions of CfE's

development post-2004 which they felt demonstrated an ongoing commitment that it would be a curriculum for all - as shown in the following extracts.

> *"I think there was this, as I say, this kind of, if you like, cultural memory that Scotland had always been a more kind of... a more level playing field than other places in the UK, with less emphasis on the kind of competitive mentality".* (Interviewee 5)

> *"[…] when 5-14 was introduced in the 1990s then… that was a common curriculum for all young people, and the intention behind it was that you created a progressive… effectively a ladder through 5-14, and then the challenge for schools was to get as many young people as possible, every young person if possible, to be able to progress up that ladder as far as you could get them. So 5-14 was, in itself, influenced by that notion of equity in terms of young people's entitlement to a common curriculum, taken forward, subsequently, into Curriculum for Excellence, which again, right from the outset, was quite clearly a curriculum for all young people, not a curriculum for some young people and others would get a different kind of curriculum.* (Interviewee 8)

> *"So from the starting point that it's a curriculum for all children, and that our intentions are that they would be successful learners, confident individuals and so on, and so forth, that sets out an aspiration that every single child […] should be enabled to develop in those ways, and we were very, very careful in the descriptions that we would put of the four capacities, and the sub text, what we called the capabilities and so on, that they were done in as […] inclusive a way as possible, so even the way that it describes communication, for example, all of that was intended to be entirely inclusive, every single child in Scotland, regardless of what learning needs they may have, or any other aspects of their lives, so that I think is the statement of intent, which I think maybe should make it clear just how important equity was in the conception of what we were trying to do".* (Interviewee 9)

> *"So that was the exciting bit about Curriculum for Excellence, that one of the big wins was that previously we had what were called elaborated curricula for those with needs, and so it was kind of like a second class type approach, so Curriculum for Excellence was seen as a unifying approach to providing equality of access to high quality curriculum provision […]".* (Interviewee 15)

The OECD review, 2007

As noted in chapter 4, the OECD's 2007 review of Scottish education reached several conclusions relating to the impact of socio-economic status on children and young people's educational experiences and outcomes. Those interviewees who had been involved in policy development in 2006-07 reflected on its origins. Interviewees 4 and 8 confirmed that the commissioning of the report was done in the expectation that the

OECD would focus on equity, as well as more general insights into how Scotland should move forward with its education policy intentions.

> *"Indeed there was an OECD review, not the most recent one but the one before that in the early 2000s, which particularly focused on that issue* [equity], *because it was asked to do so by Scottish Government […]".* (Interviewee 6)

> *"No […] the OECD didn't just decide to look at that* [equity], *I mean that was very much the thrust of what was expected of the OECD, and the discussions with the OECD team were very much, you know, around that as a consistent theme".* (Interviewee 8)

Interviewee 5 remembered there being two distinct viewpoints within the team which visited Scotland to carry out the OECD review.

> *"Yes, there was quite a lot of discussion at the time about who in the OECD would be involved in the production, because like all of these things beliefs about… I think the people who were involved in PISA and in developing PISA had one kind of a stance on the relationship between… about data shall we say, and what data informed and all the rest of it, and how to interpret data, and others had different views, and I think on the team, as I recall, in the discussions, there were people from, as it were, both camps and, […] it was interpreted, I seem to remember, as being that we should do data gathering differently, I think, part of it was saying that we needed more standardised measures and things, and then on the other hand there was recognition of the stuff that we'd been doing in Assessment is for Learning, which was a different kind of approach".* (Interviewee 5)

In relation to the review's findings and reception, three interviewees (2, 6, and 8) agreed that it had not told Scotland anything new. These interviewees agreed that Scotland already had data and analysis that highlighted the impact of socio-economic disadvantage on educational outcomes. However, they did acknowledge that the OECD's findings were important as they focused policymakers' attention on equity, as well as providing broader external verification of the Scottish policy direction.

> *"It didn't seem to come as a surprise, as I said, it was articulated in a particular way […] that helped crystallise it […]".* (Interviewee 6)

> *"So I think the report had an important catalytic effect, I don't think it was earth-shattering in terms of what it said, I don't think it told us anything that we didn't know, but it had a powerful reinforcing effect, and the OECD, you know, has an important professional role but, almost more so, it has a very important political role in terms of helping to create an authorising environment for particular policies, and people like Andreas Schleicher and so on are incredibly influential in that regard".* (Interviewee 8)

The interview data indicated that there were mixed interpretations of the review's findings among the education policy community. For instance, Interviewee 12 highlighted that they had interpreted the review in a way that could be seen as "complacent".

> *"But the message I took from that* [the OECD review] - *maybe this was a… what's the word, a complacent message - was, this is not an exact quote, but close to it, that it really didn't matter which school you went to, what mattered was the social context from which you came; therefore that solutions to equity… you know, you could take from that that solutions to equity, to a large extent, lie outside the school, you know; and that the education system, if it's going to address that social inequity and inequality, can only do so if other steps are taken to address that through a number of policy areas […]".* (Interviewee 12)

In contrast, Interviewee 6 suggested that the OECD review's findings had related not to wider social policy, but to the ability of schools to address socio-economic disadvantage.

> *"And that* [the OECD review] *began to say that […] schools were not strong enough, something we knew about in Scotland, too many schools looked the same, they're not strong enough and there's a postcode lottery in that if you're born into poverty you can't get out of it. […] So schools were not strong enough to turn around a young person's life. Now that's the kind of analysis and, from the researchers, that I think crystallised for a number of people what the actual problem was […]".* (Interviewee 6)

However, the interview data suggested that the OECD's findings around socio-economic disadvantage had not prompted significant change in CfE's policy direction. Interviewee 12 did not remember the CfE Programme Board discussing the review's findings.

> *"So I don't recall […] it doesn't seem to have informed discussion in the Programme Board".* (Interviewee 12)

This may be because the last meeting of the Programme Board took place in the same month as the review's formal publication. However, a broader explanation was provided by Interviewee 10, who felt that the review's findings had not resulted in policy change due to their timing.

> *"[…] I think at the time we were really focused on the draft of the experiences and outcomes, of really making the seismic shift from one major approach to curriculum, to learning, teaching, and assessment, to the other. So there was such a focus there on making those moves, and using the design principles for the curriculum in particular at that time, the curriculum design principles to review what we were currently doing and where we needed to get to next […]".* (Interviewee 10)

'Equity' within CfE communications

Overall, Interviewee 15 recalled that, by 2010, policymakers felt that "the pace of change wasn't sufficiently brisk". This interviewee remembered that there had been a refocusing of CfE communications at this point. This included referencing policy goals such as raising attainment and reducing the impact of socio-economic status on outcomes, as shown in the extract below.

> *"And certainly it was quite interesting in terms of policy related to Curriculum for Excellence, there was… 2010, when we did a big relaunch and we stopped inspections to do a big training focus, there was a bit of retro-analysis done, because people were saying, "Well what's all this about? We're getting buried in detail", and I remember at that time it was, "What are we doing it all about?", it was about raising attainment, closing the gap, and preparing for the future, they were our big three mantras that we re-emphasised as we were encouraging people to buy into the need for change".* (Interviewee 15)

7.3.4 CfE policy development, 2014-21

Emergence of the term 'equity' - main drivers

Chapter 4 suggested that the post-2014 period had seen a much stronger explicit emphasis on equity within Scottish education and curriculum policy. Interviewees confirmed this and highlighted the role of political leadership in driving this shift in the focus of education policy. Five interviewees (1, 2, 6, 10, and 14) agreed that Nicola Sturgeon, the current First Minister, had played an instrumental role in prompting the strong focus on equity - as illustrated in this extract from Interviewee 10.

> *"[…] but when the new First Minister came in, and she decided to make her defining mission closing the poverty-related attainment gap, the profile of that conceptually changed very significantly and increased substantially, and became a sort of central pillar to the work that was done obviously around the Government's flagship programme, Scottish Attainment Challenge, but also the way in which we looked at CfE, and realising the potential of the curriculum, as well, and seeing it through that lens, of equity, particularly in relation to social disadvantage, and particularly children living in poverty, so I would say it significantly amplified around the change of First Minister, in terms of raising the profile of this right to the top of the agenda".* (Interviewee 10)

Within this context, there was agreement among six interviewees (1, 6, 10, 13, 14, and 15) that equity had become a much more commonly used term within Scottish education policy in the post-2014 period - as illustrated by the following exemplar quotes.

> *"[…] I think it just became part of the discourse around the time that we were looking at the Scottish Attainment Challenge, the change in First Minister, the sort of excellence and equity strapline emerged when we looked at different systems, at different countries' approach to this, we looked at the Pupil Premium obviously, and others, and equity emerged as a way of kind of describing our approach to closing the poverty-related attainment gap".* (Interviewee 10)

> *"I think from a policy perspective, in relation to education more broadly, I think the run up to the launch of the Scottish Attainment Challenge, from a policy perspective's where you start to see that* [equity] *really becoming a common discourse, I guess, across policy colleagues, politicians, nationally, you know, where it starts really to come into its own […]".* (Interviewee 14)

In addition to political priority setting by the First Minister, four interviewees (2, 6, 8, and 10) highlighted that data and evidence had contributed to the increased focus on equity within education policy in the period after 2014.

> *"[…] obviously that's changed since then* [the 2007-11 Parliament], *and I think a really welcome spotlight has been shone by using the evidence around literacy and numeracy achievement, the academic qualifications of a range of groups […]".* (Interviewee 2)

> *"[…] and the Joseph Rowntree Foundation report of 2014, on poverty in Scotland, was obviously a key document, as I say some of the messages in there I think were really taken forward, but a central challenge that that report posed for us was upskilling the profession to make curriculum design decisions that would help to overcome the impact that poverty had on children's progress".* (Interviewee 10)

Three of these interviewees (2, 4, and 6) suggested that increased use of data highlighting socio-economic concerns was not a new development in the post-2014 period, however they did refer to an increased focus on what the data were saying in this period - for instance:

> *"And over time […] by looking at evidence coming through, and looking at it in more detail, at that in more detail, I'd have said by 2014, 2015 the gap between those who have and those who haven't was beginning to become clear. You could analyse the SQA data by SIMD* [Scottish Index of Multiple Deprivation[7]] *quite a bit, and they could see that the graph showing SIMD 1 versus SIMD 10? 20? 100? …whatever, and they could see […] as you would expect unfortunately, that those in advantaged areas do better than those in disadvantaged areas. So the talk then was how do we keep that graph at the top end growing, the more able, but close*

[7] The Scottish Index of Multiple Deprivation is a relative measure of deprivation. It divides the country up into 6,976 small data zones. Data relating to seven domains (e.g. education, health, crime, and housing) are used to calculate an overall score for each data zone. The data zones are then ranked across the country and assigned to deciles 1 to 10 - with decile 1 containing the most deprived data zones and decile 10 containing the least deprived data zones. (Scottish Government, 2021e)

> *the gap […] The evidence from schools as well was possibly showing that as well. […] the Scottish Survey of Literacy and Numeracy that was introduced at one time, I can't remember if that showed […] any equity gap in there, but certainly it came into the policy discussions late 2014, into 2015 […]".* (Interviewee 6)

There was also an international dimension within interviewees' perspectives on the extent to which Scotland had started to disaggregate outcome data by socio-economic group. Four interviewees (3, 11, 12, and 15) referred to the OECD's PISA assessments having influenced this, at least in part. The following extract illustrates their perspectives.

> *"Oh, I would say* [the increased focus on equity within Scottish education policy was] *absolutely linked to PISA, OECD. OECD would have been a driver, you know, so obviously our 2015 BGE OECD* [country review report] *was the main driver for our current one, but prior to that I think it was 2007 the OECD report? […] And again, you know, they've got a lot… a huge dataset on the whole poverty-related attainment gap, so yeah they're the reasons, that international drive in terms of those successful systems that are bringing about improvements as a result of that focus".* (Interviewee 15)

However, Interviewee 12 highlighted that this was a relatively recent interpretation of PISA data - suggesting that Scottish policymakers had a different interpretation of PISA data in the early 2000s.

> *"[…] there was a recognition from PISA 2000, PISA 2003 that there were a lot of people attaining pretty highly, in PISA terms, and there were a lot of young people achieving pretty poorly in PISA terms. But at that point, there's a couple of references in the documentation to the trend going in the right direction, the gap was in actual fact narrowing from 2000, 2003".* (Interviewee 12)

Defining 'equity'

Seven interviewees (1, 7, 8, 9, 10, 12, and 15) reflected on the meaning of equity within recent Scottish education policy. Interviewees 1, 7, 8, 12, and 15 felt that the concepts of 'equality' and 'equity' are often used interchangeably in different contexts, and that the distinction between them is often difficult to resolve, as shown in the following extracts.

> *"[…] I tend to think that equity is an evasive term. It's designed really to mean anything short of actual equality. It's a way of pretending to be egalitarian without necessarily having to do all that much about it". […] So something could be seen as equal, namely opportunity, but not equitable because we knew in advance that some people would be fully able to take the advantage of any opportunities they were offered and others would fail to do so for a variety of reasons, so at that point I think some years ago equity was seen as a stronger term than equality. I now think it's the opposite because politicians particularly have realised that equity doesn't have a good definition, you know it means not*

much more than fairness and so it's a slippery term in a way that equality isn't. So I think in practice equity nowadays is a weaker term than equality but I think it started off as being a more powerful term. (Interviewee 1)

"[…] but we've seen all kinds of different useful interpretations of it [equity]*, you know the diagram of the child and the fence and the blocks*[8]*, and I think all that… I know some people have concerns… people don't understand the difference between the two, but I think it's quite helpful that we're engaging in a lot of that dialogue and debate as a system".* (Interviewee 10)

"[…] I think the two are used interchangeably in lots of different spheres, and we've had lots of discussions about… within education, making sure that we don't label children and young people. So, that business about providing reasonable adjustments and understanding learners' needs is probably coming at it from an equitable point of view, a fairness point of view, so that I think that word fairness comes into definitions often, but a recognition that everybody is different, and therefore can't really get an equal, or it being the same. So there's, you know, all sorts of philosophical debates and discussions around how the two are interrelated and so on […]". (Interviewee 15)

7.4 The technical form of Curriculum for Excellence

7.4.1 Curriculum Review Group, 2003-04

Curriculum input deregulation

As noted in the introduction to this chapter, section 7.4 focuses on data relating to the topic of curriculum input and output regulation. Like section 7.3, it takes a chronological approach to discussing this topic - beginning with the Curriculum Review Group. During the interviews, the Curriculum Review Group's thinking on curriculum input regulation emerged as a theme. As noted in chapter 4, Curriculum for Excellence (CfE) appeared to be an example of the new curriculum frameworks, which emerged in the 1990s and 2000s, and sought to combine curriculum input deregulation with output regulation. Several interviewees reflected on the extent to which the Review Group had considered curriculum input deregulation as part of its work. Two interviewees (1 and 12) referenced the UNESCO publication *Learning: The Treasure Within* (Delors, 1996). As noted in chapter 4, this publication highlighted the need for education systems to respond to globalisation and prioritised lifelong learning, the links between education and work, and the need for curricula to include both content knowledge and facilitate the development of a wider set of skills. Interviewee 1 acknowledged that there was a strong similarity

[8] This comment relates to the equity image discussed in Chapter 1.

between CfE and the UNESCO work but claimed there was not a direct link between them.

> *"An unusual feature of what we did come up with there is that our four purposes are not just similar to, they are to all intents and purposes identical to the four purposes that the UNESCO group chaired by Jacques Delors came up with. […] But each of these groups produced its conclusions in ignorance of the other one. […] So I suppose that takes us back to something we discussed earlier on about the internationalisation of education policy, and it suggests the existence of some sort of zeitgeist which influenced both UNESCO and the Curriculum Review Group".* (Interviewee 1)

In contrast, Interviewee 12 had a different recollection, in which the Curriculum Review Group had used the UNESCO publication more explicitly as a reference point.

> *"So you start the Curriculum Review Group looking at the curriculum, this group of people who by and large do know each other, with this external stimulus, largely through government input, and using the National Debate and its key findings, using a reference to UNESCO […]".* (Interviewee 12)

As well as the reference to UNESCO, five interviewees (1, 2, 3, 5, and 7) discussed a perception at the time of CfE's early development that Scottish education needed to respond to wider global economic and technological change. As discussed in chapter 3, this was a strong driver of the emergence of the new curriculum frameworks. The following extracts from Interviewees 1 and 3 exemplify this theme.

> *"But there was a feeling, very widespread, that however good Scottish education might be - and I think that many respondents to the Debate greatly exaggerated the quality of Scottish education - however good it might be, it needed to change because the world was changing round about it. So within the Review Group […] there was also this notion of a curriculum for the future".* (Interviewee 1)

> *"[…] I think there was a recognition that globalisation was having an increasing impact on how we prepare children for a very different world. I think the digital age was really kicking in […]".* (Interviewee 3)

In addition to interviewees' recollections of the international drivers of the shift away from curriculum input regulation, there appeared to be some evidence that the Curriculum Review Group had been keen to extend the focus of the Scottish curriculum beyond content knowledge - as shown in the following extracts.

> *"[…] I remember there was a discussion about the way that subjects evolved and new spheres of knowledge emerged, and how important it was that connections were made between subjects, and that there was too much, as it were, siloing, and that this could disadvantage people who were not very interested in a particular*

> *silo, so [..] that was certainly talked about, and also […] trying to make the learning authentic in some ways, that was a very strong thing […] trying to make it seem real and purposeful, that you weren't just going to some alien environment, to spend some years, where you were made to feel silly, and then you left, so trying to make learning authentic, seeing how it applied to everyday… the everyday lives of people […]".* (Interviewee 11)

> *"[…] we* [the Curriculum Review Group] *wanted a curriculum that would support a broad description of learning, so that it goes beyond, in inverted commas, the academic, to include such areas as what became the four purposes of the curriculum; right, it's not enough to simply say, "You are learning knowledge and skills that are inherited from the past", maybe critiqued a little. What we are doing is building people who will be active citizens in the context then of, in a sense, a new country, who will understand issues of democracy and social justice - these were important issues for us - and the curriculum should facilitate that […] I can't remember explicit discussion, but probably implicit, and this is when the concept of wider achievement became more prominent; this was to recognise that schools do validate certain kinds of knowledge as important […] and what we wanted to do was to recognise that children and young people learn other things, and they learn in a variety of ways, and they learn in a variety of contexts, so the concept of wider achievement, recognising what young people have learned outwith the formal structures of a curriculum plan, was important".* (Interviewee 12)

Interviewee 11 also recalled the Curriculum Review Group discussing how curriculum knowledge related to questions of power, as shown below.

> *"[…] it's always a difficult thing to try to navigate this, but trying to say, you know, knowledge is power, certain kinds of knowledge anyway, are power, and therefore, people have to […] be aware of that and then have access to it, in a way that is meaningful to them, so there certainly were those kinds of discussions".* (Interviewee 11)

Curriculum output regulation

As well as curriculum input deregulation, there was evidence from three interviewees (3, 11, and 15) that the Curriculum Review Group had been concerned to reduce the emphasis on output regulation - particularly in the form of assessment. The data suggested that the Review Group's thinking had been influenced by the conclusions of the National Debate on Scottish Education. The following extracts illustrate this theme.

> *"I think there was a lot of discontent about 5-14, and particularly some of the testing regime around 5-14 […]".* (Interviewee 3)

> *"[…] the whole assessment agenda was informed by the National Debate, you know, so in terms of too much focus on assessment, too much assessment, not learning… being prepared to, you know, the whole focus on examinations and so*

on, and the 5-14 assessments at different stages, and there… were there too many stages and all that kind of stuff". (Interviewee 15)

7.4.2 CfE policy development, 2007-14

Curriculum input deregulation

Realising curriculum deregulation through CfE policy between 2007 and 2014 emerged as a strong theme within the interview data. Seven interviewees (3, 4, 6, 7, 13, 14, and 15) highlighted that CfE aimed to better meet the needs of individual children and young people through input deregulation. These interviewees mentioned several elements of the rationale for input deregulation through CfE. The first of these was that it would lead to more engaging and motivating learning. A key driver for this kind of learning would be that the curriculum would be more responsive to local contexts or individual interests, and therefore would appear more relevant - as shown in the following extracts.

> *"I think the most significant change was looking at children as individuals and meeting their individual needs, as opposed to, you know, I'm teaching P3 and I've got my […] top Maths group and my bottom Maths set or group, and actually looking more at what the individual needs are of learners. I think that was one of the […] critical […] parts of the* [CfE] *philosophy".* (Interviewee 3)

> *"It was also kind of making it a bit less prescriptive about the actual content through which you would learn, the competences and skills which were set out in the curriculum, and I think that […] deliberately had a kind of equity function too because it was recognising that the way young people might want to learn research skills in the north of Scotland or in an urban housing estate or whatever might be very different from children in other parts of the country, and the schools could customise much more the content, the contexts of learning I guess is particularly what we're looking for here, in a way that would motivate and engage those young people and made sense to them, and the background that they lived in".* (Interviewee 4)

Interviewees used several metaphors to describe this process - from baking a "curriculum cake" (Interviewee 3) to using curriculum "building blocks" (Interviewee 14) to design bespoke curricula. Interviewees 3 and 6 equated CfE's focus on curriculum input deregulation with equity, although they did acknowledge that the term itself would not have been used in CfE's initial policy texts.

> *"And I think there was a recognition that, if there was to be equity within the system, you needed to have, you know, 2,700 different curricula in Scotland that accorded with the number of schools that we have in the system, because every one of them is different".* (Interviewee 3)

Interviewees mentioned specific dimensions of CfE's approach to curriculum input deregulation, including the removal of time allocations for particular curriculum areas, a shift towards expressing the curriculum in terms of outcomes, and a greater emphasis on teachers as curriculum developers. These perspectives are illustrated by the following exemplar quotes.

> *"And although the basic principles of creating a curriculum and the building blocks might be similar, how you then package that, and the learning and teaching approaches, and the assessment approaches, will actually be different. And I do think that the approach that we took of having the experiences and outcomes was a good example of that. […] How you package those is something that is best packaged at the point of delivery. So I think the concept of having experiences and outcomes was absolutely spot on".* (Interviewee 3)

> *"[…] now that* [responding to children's geographical context] *was an indication of moving away from a straightjacket of a curriculum, which was very much centrally driven, and towards allowing this flexibility which would allow for that professional judgement of teachers to make a call in relation to what would get youngsters engaged, and I think talking to teachers involved, who did take forward learning outcomes approaches, they did talk about the students becoming more motivated".* (Interviewee 7)

> *"[…] and certainly what it* [CfE] *allowed leaders in schools to do was to do that close analysis of […] where they were, and how to match a curriculum to meet those children's needs, in a way that 5-14 curriculum certainly did not. […] I think my own stance was, this gives me a lot more flexibility and freedom to better meet the needs of the children that I have in front of me. I'm not delivering a kind of secondary school timetable of x and a half hours of Social Subjects a week, because 5-14 timetables for primary schools had begun to look a bit like that, whereas this was giving me the opportunity to look at gaps in experience for the children that were in my school and to build a curriculum that focused more on those".* (Interviewee 13)

As signalled in the final extract above from Interviewee 13, the focus on input deregulation within CfE appeared to have been at least partly prompted by a reaction against the previous 5-14 curriculum. Chapter 4 highlighted that the 5-14 curriculum dated from 1991 and had been heavily influenced by the tight input regulation of the English National Curriculum of 1988. Most interviewees who discussed 5-14 felt that, once implemented, it had inhibited the scope for curriculum differentiation in Scotland. Nine interviewees (3, 5, 6, 8, 9, 12, 13, 14, and 15) highlighted that they felt the 5-14 curriculum had been too focused on assessment and attainment, too centrally directed, and too top down. Interviewees also reflected on the fixed percentages of time within 5-

14, in which the time to be allocated to teaching areas of content (knowledge) were fixed nationally. The following extracts reflect the views of these interviewees.

> *"But the previous 5-14 would have developed that curriculum we're talking about on the timetable, explained it to parents, then it would have stayed the same every year, and the children then just passed through from primary 1 to primary 7, or S1 to S4 or five or six and so on there, and the curriculum stayed the same and then people moved through it. And that was the idea, the concept, of the child being taken to the curriculum".* (Interviewee 6)

> *"[…] headteachers, in primary schools, were counting in minutes, how much time was spent on literacy and numeracy, because it said in the guidelines it had to be 15 per cent of the week, so they were doing their sums and saying things you know, like this means that each day of the week you will spend, I'm inventing the figure, an hour on literacy, except on Fridays, when you need spend only 53 minutes on it, because you've already done enough; you know, it reached stages like that, of absolute nonsense, in terms of planning, people being asked to produce ever bigger planning documents to meet curriculum requirements".* (Interviewee 12)

Interestingly, Interviewee 14 did reflect on some positive elements of the 5-14 curriculum.

> *"[…] I still think there are good bits of 5-14, you know, the way that the Science progression was laid out was really helpful, and arguably, you know, because one of the big issues with the Curriculum for Excellence policy and the green folders, and the experiences and outcomes themselves, you know, one of the huge issues around that, from the word go, was, "They're woolly"".* (Interviewee 14)

Disciplinary knowledge within CfE

Alongside the above reflections on how CfE aimed to realise input deregulation between 2007 and 2014, interviewees also considered the extent to which the new curriculum ensured access to disciplinary knowledge. Chapter 4 highlighted that the new curriculum frameworks, which emerged in the 1990s and 2000s, sought to reduce the specification of educational content, while incorporating statements of generic competencies, skills, or learner dispositions. Six interviewees (1, 5, 8, 9, 11, and 12) mentioned the role of disciplinary knowledge within CfE. The following extracts from Interviewees 8, 9, and 12 illustrate interviewees' recollections of how policymakers had viewed the role of disciplinary knowledge within CfE.

> *"[…] So, there's a whole variety of different ways in which you can construct a curriculum, and disciplinary knowledge is clearly a significant contributor to that. I think the biggest difference we're now seeing is we're moving, I think, away*

> *from a curriculum that's defined in terms of subjects or disciplines, I mean there's a difference between the two of course, but… and a curriculum which serves more overarching purposes, and subjects and disciplines contribute to those overarching purposes, in Scottish terms the four capacities would be an example of the intention is to develop young people with those capacities, and how can subjects best contribute to that, how can disciplines best contribute to the development of those capacities […]".* (Interviewee 8)

> *"I think what is interesting is the extent to which hard stuff needs to be there, and that part of the design of the curriculum should be to do with building in really tricky ideas and concepts, and enabling youngsters to get the confidence that when they're faced with something like that they don't actually say "I don't know how to do this" but they get the confidence to be able to engage with something without being terrified, and not liking the feeling that you get in your head when you're tackling a tricky problem. And so, the curriculum needs to be seeded with appropriately hard stuff.* […] *So we wanted to make sure that somewhere or other the kinds of ways of thinking that go with the disciplines were guaranteed for… contact with that was guaranteed for every child as far as it was within their capabilities to engage in that way, which was the reason for the Broad General Education notion, so within that you will see explicitly or implicitly progression along concept development and ways of thinking that are associated with the various disciplines".* (Interviewee 9)

> *"We were quite clear that important knowledge was still an important feature of the curriculum, and I think that is reflected clearly in areas like the Sciences, Technology, Social Studies, Religious and Moral Education".* (Interviewee 12)

Interviewee 12 also highlighted that the development of CfE's experiences and outcomes was intended to reflect progression in disciplinary knowledge. This is reflected in the following extract relating to the advice given to the groups of writers who were developing the experiences and outcomes.

> *"[…] step back from the 5-14 model or a SQA syllabus model, and […] think about bigger ideas, and how these would be reflected in progression as young people went through schooling […]".* (Interviewee 12)

Interviewee 12 also highlighted that there had been some initial disquiet about a perceived loss of content knowledge within the new curriculum.

> *"Equally you had the people who were saying, "Where is the knowledge of Physics, or the knowledge of Chemistry? Has that vanished? We think it has vanished", and saying, "No, it's there, it's implicit, but we are seeking to put it in a wider context than simply, you know, decontextualized statements of scientific theory"".* (Interviewee 12)

The data also suggested that CfE policy did not have a sole focus on disciplinary content knowledge. One strong theme from the interviewees was the desire for CfE to develop

broader competencies and skills in children and young people. Five interviewees (3, 5, 7, 8, and 12) mentioned the development of such broader competencies as important for CfE. Interviewee 5's recollections of the influence of international education policy on Scottish thinking about competencies was particularly interesting.

> *"The other thing about the OECD is that all of the work that they did on De-Se-Co*[9]*, the development and description and whatever it is… key competencies, […] and* [the Scottish Executive] *actually did use the De-Se-Co work when it came to developing that part of the Curriculum for Excellence curriculum building, the key competencies, key skills, whatever they're called, the core skills. But there was quite a lot of resistance to changing the language, and to taking account of the De-Se-Co work, I think mainly because our exam system, and the SQA already had core skills, and they weren't really much inclined to change their views at that point, so that document, you know, what did they call it, the key skills, literacy, numeracy, health and wellbeing, IT and whatever else it was, yes, that document* [Building the Curriculum 4], *was quite contested actually at the time".* (Interviewee 5)

Leading on from Interviewee 5's comment above, six interviewees (1, 7, 10, 12, 13, and 14) also mentioned that CfE policy between 2007 and 2014 had aimed to develop a broader set of skills in children and young people - as exemplified in the following extracts.

> *"And that's strongly built into the E's and O's* [experiences and outcomes] *[…] You know the formula "I have done x" and "I can do y". So the idea in that is you've been through some sort of learning experience, you may have acquired some knowledge, and the result of that is that you are able to do something you weren't able to before, which is a skills-based curriculum".* (Interviewee 1)

> *"A third feature was that the curriculum had to develop knowledge, skills and dispositions, okay, it wasn't enough just to focus on the knowledge, in a sense it's easier to talk about the knowledge, and relatively easy to talk about skills, and harder to talk about dispositions; we were saying, "No, they all have to be there, built into the curriculum"".* (Interviewee 12)

> *"I think it was looking at developing a skilled workforce for the future. I mean the clear tagline and links to jobs that had not yet been invented, […] I definitely think it was trying to look at more skills-based learning, rather than all about knowledge and cognitive abilities".* (Interviewee 13)

[9] De-Se-Co refers to the Definition and Selection of Competencies - an OECD work programme focused on cross-cutting competencies from the early 2000s (OECD, 2005).

Curriculum output deregulation

Although the bulk of the evidence discussed so far in this section has related to input regulation, there was also some evidence that policymakers had attempted to realise curriculum output deregulation. The data from three interviewees (2, 5, and 15) suggested that these attempts had begun in the 2003-07 Parliament, but had continued into the post-2007 period, as shown in the extracts below.

> *"And we were also trying to get… […] away from measuring performance and not valuing skills and everything […]"* (Interviewee 2)

> *"Circular 0205 was actually quite important, because it was about synthesising and integrating different approaches to assessment, to the benefit of everybody, and it included, so assessment for, as and of learning were part of AifL* [Assessment is for Learning], *and it was about a system which assessed children in schools, assessment by teachers, moderated by teachers, so that the schools were reporting on student development, and then also had external monitoring, if you like, through the inspectorate, through our national monitoring system, through participation in PISA, you know, it was trying to demonstrate that these things needed to work together rather than, you know, be thought of as separate and competing or conflicting ideas, so that was in 2005".* (Interviewee 5)

> *"[…] that survey* [the Scottish Survey of Achievement] *[…] was in four different areas of the curriculum, it was across the whole Curriculum for Excellence, it was… it had literacy and numeracy kind of interwoven into it, […] half of the local authorities in Scotland had an extended sample, so that they were able to report at local authority level on what was going on".* (Interviewee 5)

> *"[…] I think we were data rich before CfE, 5-14 data was coming out of our ears, we had good approaches in schools to using data to inform improvements, and of course the move within Curriculum for Excellence was to broaden out the levels at which children were assessed in order to encourage deeper learning, then had this unintended consequence of us not having as rich a range of data to help support improvement and interventions".* (Interviewee 15)

Reform of National Qualifications

Initially, qualifications change does not appear to have been a key priority for CfE policy. Five interviewees (1, 3, 4, 11, and 15) felt that the National Debate had identified the dominance of assessment and qualifications as a problematic feature of Scottish education. These interviewees highlighted that the original concern was to move away from this dominance - as highlighted in the following extract.

> *"There was concern* [in the National Debate findings] *about the so-called "two-term dash" for Highers, after the fourth year, and that that was not really*

> *equipping people very well for the challenges they would face if they went to university, although of course not all people who did Highers go on to university or college, so those… and that people were kind of specialising too early, specialising in subjects too early, and making decisions… maybe making decisions that would be affecting their future lives and jobs on the basis of, you know, not very good information".* (Interviewee 11)

From the interview data, it appeared that reform of National Qualifications became an important driver of curriculum change later in the process of CfE's development - in the 2007 to 2014 period. This theme emerged in the recollections of five interviewees (2, 4, 6, 7, and 9). Interviewee 2's recollections described the thinking behind seeing qualifications reform as a means of achieving change most directly.

> *"[…] the analysis of some key experts I'd say was that the problem with our… particularly with our secondary school system, is that we are too led by exams. Change the exams we were told, you'll change the teaching practice, and that was rubbish as it turned out. […] The primary schools weren't seen as a problem […] The problem was how are we going to get secondary schools to change? And I know that… or I heard about arguments, look let's not even worry about qualifications, let's just go for really focusing in on S1 to S3, and then of course… and then let's gradually change qualifications, but let's give ourselves some time, versus you've got children at the time taking qualifications, preparing for in S1, given the high performing schools, we can't, you can't do that, you're only going to achieve change if we go for qualifications and work backwards, and that view prevailed".* (Interviewee 2)

Alongside these insights from Interviewee 2, other participants highlighted that the review of National Qualifications was also intended to influence different aspects of curriculum change. For instance, Interviewees 4 and 7 mentioned that the review had aimed to generate a wider range of qualifications - as illustrated in the following extract.

> *"And even the SQA has produced qualifications, like leadership qualifications, which reflected that CfE view of helping develop young people's personal skills and would be openly available to pupils of all backgrounds and all schools".* (Interviewee 4)

Challenges with enacting CfE's policy goal of curriculum input deregulation

There was a sense from interviewees that there had been an initial lack of progress towards CfE's wider policy aims around curriculum input deregulation in the 2007 to 2014 period. The strongest theme within the interview data - expressed by eight interviewees (1, 3, 6, 7, 8, 9, 10, and 12) was that the policy goal of teachers taking on a

greater role as curriculum developers had been difficult to realise - as illustrated by the following extracts.

> *"[…] the notion of teachers having some control over content was common to Curriculum for Excellence and Standard Grade development. And in each case the result was a workload crisis and a morale crisis and also a clamour, "Just tell us", "Just tell us what to do and we'll do it"".* (Interviewee 1)

> *"You can't keep constantly leading from the national, you've got to allow the teachers themselves to have that space, to have that professionalism. What wasn't happening, was teachers were not picking up on that opportunity […] Now, even at the moment* [2020]*, we're still finding that curriculum rationale to be a bit of a challenge for some schools. Yes we can give teachers more freedom, but in terms of actually the curriculum providing a coherent and a progressive framework for children's learning to move through, it's… we're at a mixed stage. Some schools well ahead, some are far behind, the middle ground are taking it slowly".* (Interviewee 6)

> *"[…] the reality is that re-professionalising teachers is not necessarily easy, it's a nice phrase, because there were teachers who undoubtedly in 2004, and 2005, '6, '7 and '8 who were saying, "Oh just gonnae tell me what I'm gonnae teach", you know; there were in secondary schools - I mean this was a notable feature of the implementation of Curriculum for Excellence […]".* (Interviewee 12)

Three interviewees (2, 3, and 14) suggested that the challenges with realising curriculum input deregulation could be attributed to the demographic profile of the teaching profession or the previous 5-14 curriculum, as illustrated below.

> *"[…] we've introduced Curriculum for Excellence at a time when, […] 60 per cent of the teaching profession was over the age of 50 and… many of whom were looking to retirement. […] So the group of teachers in the middle, between the age of sort of 30 and 50, had never been a smaller proportion. And yet those were the ones that we were most dependent on to take forward the whole kind of philosophy of CfE. […] we were making a paradigm shift in our thinking about the curriculum for Scotland at a time when the proportion of folk who probably were the most able and the most willing to engage in it, was at its smallest percentage".* (Interviewee 3)

> *"[…] I think you have to put that in the context of* [5-14]*, […] and all of a sudden you go, "Not doing that any more, there's no timetable structure, go, you have flexibility and freedom". But we had a generation of headteachers, unless you were a headteacher who'd had the Primary Memorandum, which was much more flexible, under that, but you had a generation of teachers that hadn't been really trained to think about how you design curriculum".* (Interviewee 14)

Interviewees highlighted that the challenges around realising curriculum input deregulation had prompted changes in the amount of CfE guidance provided to the

teaching profession. Five interviewees (1, 2, 11, 10, and 15) reflected on this guidance - highlighting that there had been initial attempts not to provide this, but that the volume of guidance then became overwhelming.

> *"There was a… they had been used to a system that was very, very prescriptive and they were being asked to instantly transform into use your own, you know, pedagogical skills and all that, and they demanded, understandably because they were fearful, guidance. We resisted, and of course eventually succumbed […]".* (Interviewee 2)

> *"But I just think there was an awful lot of political pressure from teachers on "We want more guidance, we want more guidance" and then the more guidance they got, the more overworked they got, the more worried they got, and all the sort of ideals about more local autonomy, diversity in the system, you know, everybody doesn't have to do exactly the same thing, all that seemed to me to start to evaporate, which was a great shame".* (Interviewee 11)

Related to this theme, Interviewees 8 and 9 highlighted that subsequent reform of teacher education in Scotland had been required to ensure that teachers were able to effectively enact CfE, as highlighted in the extract below.

> *"[…] we were willing the ends in terms of the curriculum, but we weren't paying sufficient attention to whether or not we were ensuring that we had teachers who were confident and competent to realise those ends. So the nature of the "Teaching Scotland's Future" report was very much to say that if we really want to have a profession in Scotland that can make the most of the opportunities offered by Curriculum for Excellence, then that's got big implications for the nature of the teaching profession in Scotland […]".* (Interviewee 8)

Interviewees 5 and 9 also reflected that the goal that disciplinary knowledge would continue to play a role in the curriculum - albeit alongside competencies and skills - had not been successfully realised in practice.

> *"[…] the curriculum needs to be very clear about the line of progression, […] progression is everything, and seems to have been largely kind of overlooked, because there isn't a clear line of progression in most of the Curriculum for Excellence I don't think, it's just more, if you see what I mean, I don't think there's that clear line of progression because there wasn't eventually that… the kind of the big thinking about the big ideas, and there have been various attempts over the years to kind of draw back from the great detail, which I think it's all been hampered by our exams system, which has had a very controlling effect I think over… so the syllabus for the exams has really dominated I think at the expense of that planning for progression".* (Interviewee 5)

> *[…] I thought that we could do a lot of work with… you know that there would be a lot of conversations with teachers, we're not talking about necessarily just*

> *communications, we're talking about engagement, and actually that was the word we used, as I remember, which makes it even worse because we realised we needed to engage and the amount of engagement that was really required, we didn't manage to achieve that, and that was partly because it was… other people's views were that it was… teachers were closer in their thinking to where they maybe needed to be, and therefore that there wasn't… that we didn't need to do very much. […] it was a great disappointment at the time that the sorts of plans that we had for engagement around this kind of stuff, to do with intellectual rigour, to do with… you know those kind of issues which were needed* [were not realised] *[…]".* (Interviewee 9)

Related to the point made by Interviewee 9, some interviewees also expressed concerns with the overall model for engaging with teachers on CfE. Six interviewees (1, 3, 6, 11, 13, and 14) reflected on this engagement model. The following extracts illustrate the concerns these interviewees expressed.

> *"[…] I think the model of starting at the top if you like, if I can put it like that, and expecting teachers then by a process of drip feed or osmosis to be sufficiently skilled and aware to then translate all of that philosophy into something meaningful in the classroom, I don't think we spent enough time on that. I don't think that worked particularly well".* (Interviewee 3)

> *"I think the actual implementation of Curriculum for Excellence, in terms of that support to get the teachers understanding what professional learning is, what the whole policy of professional learning is all about, that wasn't strong enough […] Therefore, the capacity building was switched off, at the national level, before the evidence that it was really biting at school level, at every practitioner level […]".* (Interviewee 6)

> *"[…] I don't think there was the same kind of real thinking through of what professional development needs were going to be for this new curriculum* [when compared to previous curriculum change in Scotland] *[…]".* (Interviewee 11)

> *"[…] what you got is headteachers going along to headteacher days, meetings, sessions, and being talked at by local authority officers, people from HMI, you know, and all very helpful stuff, but my worry with that was always that there is an assumption that those headteachers can then take that, and translate it back at school in a consistent way, which you can't, that's just not going to happen […]".* (Interviewee 14)

Four interviewees (3, 7, 8, and 10) highlighted that CfE, and wider education policy, did not initially focus enough on the professional development teachers needed in curriculum making and assessment - as illustrated by the following extract.

> *"I think perhaps looking back where that worked successfully people really focused on that, they looked at the curriculum design principles, they thought about "What is the art of curriculum making?", "What's the skillset?", and*

> *possibly more could have been done to showcase that and to focus on that, rather than just move to "Here's the new experiences and outcomes, let's change our programmes and courses"".* (Interviewee 10)

Challenges with enacting CfE's policy goal of curriculum output deregulation

A theme expressed by six interviewees (2, 4, 5, 7, 8, and 14) related to the cultural dominance of attainment and exams - meaning that schools and teachers were reluctant to engage in curriculum change which could jeopardise their results - as shown in the exemplars below.

> *"And then I think a lot of naivety around assessment, and how and what are we actually looking for in terms of looking at progress and […] there was a huge under-estimation about the pressures that teachers are under from employers, parents and others to tell me how the child is progressing".* (Interviewee 2)

> *"There is huge inertia, it takes a long time, particularly with secondary schools, very much particularly with secondary schools, to generate real transformational change in the curriculum… there's huge forces for inertia, perfectly understandable forces like schools not wanting to take risks, with strong parent bodies often, and very suspicious of any major changes they feel might have some impact adversely on their children's prospects for getting into university or whatever".* (Interviewee 4)

> *"Yeah, so I think this was part of the issue with… and part of the tension that the exams brought into play. So if you're in my class, and I know I need to develop a set of skills and so on, but if I'm constantly going to be called to account in relation to your performance in the exam, and you can't measure these skills in relation to… and in the exam arena, then where am I going to put my efforts? I'm going to continue to refer back to what's going to be in the exam and that emphasis".* (Interviewee 7)

> *"[…] the rhetoric was, and I vividly remember* [a senior member of staff at the inspectorate] *standing up and saying this so many times, and […] had a diagram with cogs on it, I can still see it in my head, that the exams did not drive what came before, and that was what was said from the word go, but it's not what happened in reality, because of the way things panned out. And I think, because you had SQA, who, you know… SQA's job is in part linked to the cultural expectations of parents in the system, and university, you know, it's not a simple one, so I think you'd have to look at that side of it in relation to Senior Phase policy as well, and the difficulty of shifting that, but it's a huge other question on its own".* (Interviewee 14)

Interviewee 7 also highlighted that the policy goal of realising curriculum output deregulation had not been completely successful in the 2007 to 2014 period - with cultures of performativity continuing to exist.

> *"Now that interesting dynamic between human nature will be driven by what the system seems to value, and I went out with inspection teams and saw a huge range of work being done in terms of being inclusive, ensuring that the needs of a broader* [range of] *students were being met, but the question would always be, "And how are our exams, how does that match up in comparison to other schools of similar socio-economic status?", you know?"* (Interviewee 7)

Challenges with reform of National Qualifications as a tool to achieve curriculum change

Interviewees 2 and 6 reflected that the decision to review National Qualifications then heavily influenced the enactment of CfE for several years - as exemplified below.

> *"[…] I think in terms of the education system and national developments we're so consumed by the changes required with Curriculum for Excellence. I mean I would say overly consumed, but you know the exams system, the overhauling of exams and assessment and all that. It was seen as the priority I think that we absolutely had to modernise the then approaches, and therefore the sort of, if you like the bureaucratic operational apparatus, was focused on".* (Interviewee 2)

Due to this policy focus on National Qualifications, five interviewees (3, 4, 9, 11, and 14) highlighted that many of the issues which CfE had originally aimed to address were left unresolved during the period between 2007 and 2014. These issues included: over assessment (Interviewees 3, 4, and 11); the development of the Broad General Education (Interviewees 9 and 14); teacher workload (Interviewee 11); and making early primary less regulated and academic (Interviewee 4). The following extract illustrates one dimension of the extent to which change prompted by qualifications reform had been limited.

> *"I mean the qualifications drove what happened, and in part the Broad General Education S1 to S3 really suffered as a result of that. And actually the degree of change was fairly minimal, to the extent that even seven, eight years in, in fact even last year I think I still came across somebody who went, "I'm still waiting for that to go away", you know, this far down the line. So there was something that just really didn't work in the way it was intended to in that phase of the development, I guess, because at the end of the day, that's what secondaries are judged on, it's high stakes for them, you know, so culturally that's difficult as well".* (Interviewee 14)

There was some evidence that the lack of change as a result of qualifications reform may have been prompted by the fact that the new qualifications were similar in format to those that they replaced. Three interviewees (7, 8, and 12) reflected on this issue - as illustrated below.

"[…] but the exam system, and I was involved with the SQA, did try to go beyond a recounting of knowledge into a broader focus on what could be assessed, but in reality, in an exam hall, you're limited in what that assessment can be". (Interviewee 7)

"[…] the intention in Curriculum for Excellence was that the qualifications would grow out of the curriculum reform, and act as a natural progression out of that curriculum reform into qualifications. I think the extent to which that's happened in practice is pretty variable, and the concern that we have around the nature of the qualifications, as you can see from the Education Committee's report last week, remains […]". (Interviewee 8)

"While the qualifications should be informed by the same principles as Curriculum for Excellence - and I've no doubt that steps were taken to do so - but you still end up with something that looks very much like the qualifications that came before: same subjects, by and large, not entirely, I mean Skills for Work courses came in, for example; same assessment models to a large extent, again there were exceptions where SQA used the opportunity to develop new and creative means of assessment - I mean for the final terminal assessment in a year-long course - but all too often they were rather like traditional exams […]" (Interviewee 12)

7.4.3 CfE policy development, 2014-21

Continued relevance of curriculum input deregulation

Within the data relating to the 2014 to 2021 period, the original intention that CfE would realise curriculum input deregulation still emerged as a theme - with four interviewees (3, 6, 10, and 13) reflecting on this. Within these interview data, interviewees often mentioned the ability to adapt the curriculum to respond to individual needs or circumstances, sometimes directly mentioning the principle of equity, as shown in the following extracts.

"I think that part of that cultural shift we're going through in Scottish education is teachers viewing their role differently to what it was ten years ago. And I think that's characterised by a move from them delivering lessons and a curriculum that has equality as its basis, towards one that is much more focused on meeting the needs of individuals and having equity, the concept of equity, at its centre, particularly in primary I have to say, I think less so in secondary because, you know, we still have a good number of secondary teachers who see themselves as teachers of subjects and not necessarily teachers of learners. […] CfE has prompted it […]". (Interviewee 3)

"And I think, still, the leaders and teachers would identify […] with the policy of closing the poverty-related attainment gap, and the money for that through the Scottish Attainment Challenge, Pupil Equity Funding and so on, as being morally the right thing to do, to give them the opportunity, a bit extra money, to really

> *make the curriculum, make the offer in their schools bespoke for their children […]"* (Interviewee 6)

> *"[…] I think Curriculum for Excellence has always been clear, and is now increasingly clear with its refreshed narrative, that the curriculum within an individual establishment has to be created to meet the needs of the learners within that establishment. So it has to meet the needs of those children and young people in a particular area, at a particular time, recognising that that is different from another area even within a mile or two's range […]".* (Interviewee 13)

Interviewee 10 reflected on some of the ways in which attempts to realise curriculum input deregulation had become more problematic in the 2014 to 2021 period.

> *"I think that's something* [risks coming from practice being too variable] *that has played out in the media, so if you look at the whole debate over subject choice, because what we would expect with a broad national framework that sets out experiences and outcomes, and a lot of opportunity for flexible, local decision making, of course we're going to end up with different offers at local level, different pathways, ideally being tailored to the needs and aspirations of individuals or groups of young people, because it does put a significantly higher expectation on the professional decisions that teachers and schools make, around the learning and teaching and assessment that's on offer".* (Interviewee 10)

Therefore, generally the interview data suggested that curriculum input deregulation had remained an important policy goal for CfE up to 2020.

Curriculum output regulation

Section 7.3 highlighted that interviewees agreed that the term equity had increased in prominence in the post-2014 period. A strong theme within the interview data was that 'equity' had taken on a distinct meaning within Scottish education policy - one which emphasised measured attainment. It appeared from the interview data that a more precise definition of 'equity' had been needed to make the principle useful within the policymaking process. Interviewee 15 commented:

> *"So, that's why the two* [equality and equity] *are always interchangeable, I think, and that's why the policy concepts have been needed, to be making sure that we have a consistent approach. So, the poverty-related attainment gap is just one of the many gaps, and it's what do you mean by a gap? Is it a gap in terms of an outcome, or a gap in terms of accessibility to a curriculum?"* (Interviewee 15)

Five interviewees (1, 8, 10, 14, and 15) referred to ways in which the OECD had influenced this attainment-focused framing of 'equity'. The following extract from the interview with Interviewee 15 illustrates this influence.

> ***Researcher:*** *"Yeah, and what about equity as a term, did that come from OECD do you think?"*
>
> ***Interviewee 15:*** *"Definitely, definitely, I would say so, yeah. […] And that's why, you know, the policy pedantic-ness relates back to the OECD definitions, rather than… I'm sure you'll have come across much wider research definitions of it, but that's the causal link if you like".*
>
> ***Researcher: "****Yeah, okay, and can you say a bit more about why the OECD's focus on equity was so influential?"*
>
> ***Interviewee 15:*** *"Because the… data, it's all about data. And, of course, 2015's findings* [from the OECD review of CfE carried out in that year] *was that we didn't have enough data to inform improvements related to CfE implementation. And as a result they ended up going back to old datasets, related to PISA and so on, and that was showing our… where we were sitting internationally, and that became a focus for, "You need to sort this out"".*

Six interviewees (1, 3, 4, 6, 10, and 15) also highlighted that the policy concept of 'equity' outlined above had been reflected within the National Improvement Framework for Scottish Education. As highlighted in chapter 4, the National Improvement Framework, which was introduced at the end of 2015, aimed to improve the collection and use of data about school education, and included the introduction of a new programme of standardised assessments. These interviewees' perspectives are illustrated in the following exemplar quotes.

> *"It's* [equity] *really the guiding slogan of the National Improvement Framework isn't it? And as far as I know it was probably thought up in that context. I don't remember that particular phrase being widely used prior to the arrival of the National Improvement Framework".* (Interviewee 1)
>
> *"But all schools, I think, you see this sign up to the National Improvement Framework, you see that we all agree on the sort of top-level vision around excellence and equity, lots of debate about how to go about that, as there should be, we want a profession where there's a lot of enquiry, there's a lot of… there's a criticality in terms of interpreting what's coming at them, interpreting what professionals are seeing, so we want that sort of debate to continue".* (Interviewee 10)
>
> *"And so they* [the OECD] *had to then in 2015 rely on mostly… on the PISA results and of course that's where the emphasis is, that revealed the lack of data in our current approaches, or at that time's current approaches, because we've now got our SNSAs* [Scottish National Standardised Assessments] *as a result."* (Interviewee 15)

The linking of 'equity' to attainment was also expressed by five interviewees (4, 6, 10, 13, and 14) in relation to the Scottish Attainment Challenge (SAC). Chapter 4 highlighted

that the SAC was a programme of targeted funding, provided to schools, to improve attainment in literacy and numeracy, and promote health and wellbeing, for primary school pupils living in the most deprived areas of Scotland. One aspect of this theme related to accountability pressures within the SAC potentially acting as a driver of curriculum input regulation. The following extracts illustrate these interviewees' perspectives.

> *"That kind of use of the spend, reporting on it, and helping schools to report on the money they had spent on the initiatives was really impacting… what gains were they expecting to see in a child's life, or in a child's writing, or Mathematics, what gains were they expecting to see after three and six months? And teachers, schools, found that difficult because they'd never been asked to do that […]. It wasn't like a national target imposed on them… you know improve your numeracy results by 10 per cent, it wasn't that, it was pupil by pupil, where are they, what do we expect, and that accountability being built into it".* (Interviewee 6)

> *"I suppose part of the issue was then, with the Attainment Challenge coming along, and PEF* [Pupil Equity Funding]*, there was a risk that people focused on the additionality, and the money, and the interventions being added on, rather than thinking… continuing to think deeply about the design of the curriculum, because now I'm still… that quote in that 2014 Rowntree report about a central challenge being practitioners knowing how to make curriculum design decisions that helped overcome the impact of poverty still remains a central challenge".* (Interviewee 10)

> *"[…] the Scottish Attainment Challenge actually posed a risk to particularly schools in challenging areas, or in high-poverty areas, because I think there was a real risk of the curriculum narrowing, and actually there is a body of evidence that shows, and you could look at… No Child Left Behind in America shows this actually… that says, the children that need that breadth of experience, and Curriculum for Excellence is really designed to give that breadth, but actually the experiences that come with that breadth are the first things that go when you all of a sudden say, "No, no, we're only going to focus on literacy, numeracy, health and wellbeing, that's what matters"".* (Interviewee 14)

Interviewee 14 also suggested that, because of such "curriculum narrowing", there was a risk of content areas such as the Arts or Social Studies being downgraded. They also reflected on the SAC prompting a change in the relationship between policy officials and schools.

> *"[…] and you had this really interesting situation where the spheres of policy writing and education, you know, and what schools actually do, now you always had that buffer of local authorities in between, and all of a sudden what happened with the Scottish Attainment Challenge is that became way messier and joined up, so I worked really closely with the policy team for the Scottish Attainment*

> *Challenge, who were actually having schools submit plans, straight to the policy team and by-passing the local authority completely, and you had a group of civil servants basically assessing those schools' plans, and they're not people that know about education, or the schools".* (Interviewee 14)

7.5 Discussion

7.5.1 Links to earlier chapters

In this concluding discussion, I consider both the analysis of Curriculum for Excellence (CfE) policy texts, informed by Corpus Linguistics, and the semi-structured interviews with policymakers. As noted in the introduction to this chapter, in chapter 3 I suggested that the technical form (Luke et al., 2012) of a curriculum - in particular its approach to input and output regulation - has strong implications for the extent to which equity defined as equitable individualisation in response to individual characteristics or needs (Schaffer & Lamb, 1981) can be realised. In chapter 2 I labelled this helpful interpretation of equity as 'Equity 2'. Chapter 3 also acknowledged social realist critiques - on social justice grounds - of approaches to curriculum input deregulation that were not accompanied by a clear position on the role of knowledge. In chapter 4 I went on to suggest, drawing on the literature, that CfE policy may initially (up to 2014/15) have provided scope for equity through its desire to realise curriculum input and output deregulation. The data considered in chapters 6 and 7 now allow me to explore these suggestions from earlier in the thesis in more detail.

7.5.2 Explicit consideration of equity within CfE policy

Both the analysis of CfE policy texts and the interview data suggest that considerations of equity were not a significant explicit driver for early CfE policymaking (in the period before 2007). The analysis of policy texts showed that neither the term 'equity' itself, nor a wider group of social justice-related terms, were heavily used before 2016. In addition, when social justice-related terms were used within the CfE policy texts, they often did not relate strongly to socio-economic inequality, but to topics such as the fairness of assessment practices. There was some evidence from the interviews that the OECD's review of Scottish education in 2007 had prompted greater consideration of socio-economic inequality within education policy (although there was also evidence that these findings were not new for policymakers). However, the data suggested that policymakers had not made substantive changes to CfE policy to address these issues. There was also

a suggestion that, in the earlier stages of CfE's development, concerns about socio-economic inequality among policymakers were "ritualistic" in nature. In contrast, policymakers' attention appears to have been primarily focused on making the many changes associated with CfE, and the later reform of Scotland's National Qualifications. In fact, both sets of data suggest that one of the 2007 OECD review's most lasting impacts may have been to introduce the term 'equity' to Scottish educational policymaking. The interview data also suggested that, at this stage in CfE's development, 'equity' may simply have been used as a convenient slogan to drive the wider policy changes associated with CfE. The assertions among some interviewees that 'equity' was an explicit consideration for CfE from the outset would appear to be an example of "imposing rationality after the event" (McPherson & Raab, 1988).

Both sets of analysis also suggested that there was a much stronger explicit emphasis on equity within CfE policy from 2014-16 onwards. The analysis of CfE policy texts showed a far greater emphasis on socio-economic issues in more recent policy texts, along with an increased tendency to frame poverty as a topic which the education system has a specific responsibility to address. Interviewees highlighted the political direction provided by the First Minister as the most significant explanatory factor in driving this change in emphasis, along with the influence of policy elsewhere in the UK, and the emergence of new data (including from PISA) and analysis.

However, it is important not to overstate the importance of the relative lack of explicit attention being paid to 'equity' up to 2014. The empirical data do not suggest that a lack of explicit attention to 'equity' meant that policymakers were blind to considerations of social justice. In fact, the interview data implied that policymakers were concerned with this topic. A strong theme within the interview data, from the National Debate on Scottish Education in 2002-03 onwards, was that CfE should be an 'inclusive' curriculum. For instance, the Curriculum Review Group appears to have been strongly concerned that Scotland should have a 'curriculum for all'. This appears to have remained influential right up to 2020. It was also reflected in the subsequent design of several important elements of CfE policy - including, for instance, aiming to provide access to the Broad General Education for all children and young people up to the age of 15. This commitment to curriculum breadth for all can be seen as aligning with a traditional Scottish curriculum priority - the idea of a period of general education leading to more

specialised study (McPherson & Raab, 1988). It also has a strong alignment with the principle of equality of access discussed in chapter 2, although policymakers do not seem to have used this term to describe their thinking. In fact, several interviewees described this policy goal as 'equity'. In addition, they do not appear to have considered what such a commitment to 'inclusion' meant for the distinct needs of specific groups of children and young people - for instance those living in poverty. Therefore, Sosu and Edwards' (2014) finding that a specific "poverty lens" was not applied to CfE policy before 2014 appears to be justified.

7.5.3 The technical form of CfE - curriculum regulation

Realising curriculum input deregulation emerged from the data as another important policy goal for CfE. Some interviewees did link this policy goal to the principle of equity - referring to the desire that CfE would enable teachers to better meet the individual needs of children and young people. This second goal was also reflected in the eventual shape of CfE policy. For instance, interviewees mentioned aspects of curriculum input deregulation such as the removal of time limits for specific subject areas, the decreased prescription of curriculum content (combined with the desire that teachers would take on a greater role as curriculum developers), and the hope that CfE would be a 'child centred curriculum'. The rationale for making these changes included the hope that children's learning would become more relevant and engaging. The interview data also suggested that CfE's desire to achieve curriculum input deregulation appeared to be at least partly a reaction against the overly prescribed nature of the previous 5-14 curriculum.

Both sets of analysis further suggested that CfE policy did not see the development of disciplinary content knowledge as the primary purpose of the curriculum, but aimed to facilitate the development of a wider set of skills and competencies - influenced by the work of UNESCO in the 1990s and the OECD in the early 2000s. There appeared to have been discussions about the role of knowledge at the time of the Curriculum Review Group. However, a clear definition of knowledge within CfE, or a rationale for selecting different areas of content knowledge, were not strong features within either the later policy texts or the interview data. The Corpus Linguistics-informed analysis of the policy texts suggested that knowledge did not appear to have a clearly defined role within CfE and tended to be combined with other learning outcomes such as skills. There were also fewer references to knowledge in the more recently published texts considered as part of

that analysis, perhaps signalling a reducing emphasis on knowledge questions. The interview data highlighted that policymakers had a general commitment to achieving curriculum input deregulation through the reduced specification of curriculum content - leading to the development of a different curriculum in every Scottish school. During the early stages of its development, there was evidence of policymakers attempting to 'defend' CfE's approach to the reduced specification of curriculum content from critics who believed that knowledge had "vanished".

There did not appear to be a shared understanding among policymakers about the role that knowledge should play within CfE. For instance, one interviewee suggested that the four capacities should drive the selection of knowledge, while another highlighted that disciplinary knowledge had already been reflected in the lines of progression within each of the CfE curriculum areas. There were also references to knowledge in varied terms - for instance framed as "disciplinary knowledge", "hard stuff", "tricky ideas and concepts", "ways of thinking […] associated with the various disciplines" and "bigger ideas". Generally, those interviewees who reflected on the place of knowledge within CfE did not mention some of the complex issues which social realist thinkers have highlighted - such as which starting point - disciplinary concepts or children's existing knowledge - teachers should select when attempting to communicate knowledge. The interview data suggested that attempts to realise curriculum input deregulation proved challenging - particularly due to a lack of capacity among teachers to undertake curriculum development work - in part because of the ongoing legacy of the 5-14 curriculum. Therefore, it appears that curriculum output deregulation remained an unrealised policy ambition in 2020.

It also appeared to have been challenging to realise some elements of the goal that CfE should be a 'curriculum for all', particularly through enacting the Broad General Education in secondary schools. There was evidence that the reform of National Qualifications, which had not originally been part of the CfE development programme, had been adopted as a means of driving curriculum change in secondary schools - including fuller adoption of the Broad General Education. However, it appeared to have generated the unintended consequence that many secondary schools and teachers decided not to make any curriculum changes until they were clearer about the nature of the new qualifications. There was also some evidence that the extent of change to the National

Qualifications had in fact been limited, which may also help to explain the finding that they did not generate the desired changes in curriculum practices within secondary schools.

The interview data also suggested that an important policy goal from 2004 onwards was to realise curriculum output deregulation - prompted by concerns about 'over assessment' and the undue influence of examinations that were first expressed during the National Debate on Scottish Education in 2003. There was evidence from the interviews that there had been attempts to 'join up' different approaches to assessment, and to introduce a more proportionate approach to national data collection using monitoring surveys. There was evidence that, as suggested by the literature, curriculum output regulation had continued to exist in other forms - particularly within schools and prompted by external inspection.

After 2015 there appeared to have been a shift in national policy, as the interview data suggested that there had been a renewed emphasis on curriculum output regulation through the reporting expectations for schools involved in the Scottish Attainment Challenge, and within national test data. Both sets of data strongly indicated that a particular framing of 'equity' - focused on measured gaps in attainment - was adopted in Scotland. This process of selecting a 'policy concept' of equity appears to have been particularly influenced by the OECD's work, including its 2015 review of CfE. Some interviewees expressed concerns about the potential that these more recent developments could influence curriculum narrowing within CfE.

7.6 Conclusion

In summary, the findings above allow me to suggest that CfE policy contained three distinct sets of ideas which can be linked to 'equity'. These can be traced back to the dimensions of the policy concept of 'educational equity' discussed in chapter 2 - as follows.

> **'Curriculum for all'** appeared to have been an early policy priority for CfE. It revolved around ensuring that CfE was an 'inclusive' curriculum, with certain values, purposes, and principles being guaranteed for all children and young people. This understanding of 'equity' appears to have strong parallels with 'Equity 1' which, as discussed in chapter 2, emphasises access to, and

opportunities to progress within, education and is underpinned by equality as a principle of distributive justice.

'Curriculum differentiation' also appears to have been an early CfE priority. The data considered in this chapter suggest that 'curriculum differentiation' aimed to establish a curriculum which was capable of being tailored locally, and in relation to individual needs or interests. This understanding aligns with 'Equity 2', which emphasises processes of equitable individualisation based on children and young people's individual needs and characteristics - and is underpinned by equity as a principle of distributive justice.

'Curriculum accountability' appears to have emerged more recently during CfE's lifetime. During the earlier stages of CfE's policy development, policy makers appeared to have been concerned with reducing the emphasis on testing and examinations within Scottish education. However, from 2014/15 onwards, a new set of ideas appears to have emphasised the importance of data and measured 'attainment gaps'. This more recent framing of 'equity' therefore has strong parallels with 'Equity 5', which has no necessary conceptual relationship with either the principles of equality or equity.

In addition, there also appear to have been three linked policy goals which are relevant to the relationship between the technical form of CfE and equity.

Policy goal 1: Curriculum input deregulation - aimed to enact a curriculum which specified content knowledge in a less detailed way, by removing time allocations for particular subjects and reducing the central specification of curriculum content.

Policy goal 2: Curriculum output deregulation (up to 2015) - aimed to reduce the scope of national policy on curriculum output regulation, through removing national tests within CfE, emphasising the value of national monitoring of attainment etc.

Policy goal 3: Curriculum output regulation (from 2015 onwards) - aimed to increase the scope of national policy on curriculum output regulation by

introducing national standardised assessments, new processes for reporting on ‘attainment gaps’ etc.

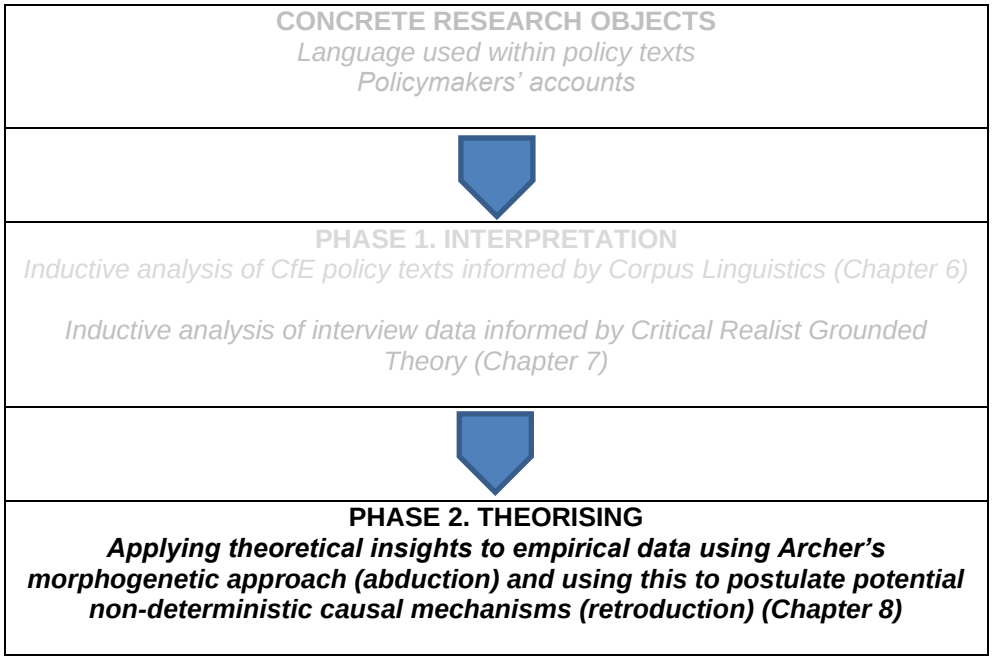
The data analysis presented in chapters 6 and 7 has allowed me to identify these three distinct framings of ‘equity’ within CfE policy, along with the policy goals most closely linked to curriculum regulation. These two chapters make up the ‘interpretation’ phase of the analytical strategy first outlined in chapter 5. Chapter 8 now moves on to describe the second ‘theorising’ phase within that analytical strategy. In this chapter, I will apply Archer’s (1995) morphogenetic approach to the data which I have already considered above.

Chapter 8 - Findings: theoretical analysis

8.1 Introduction

In chapter 8, the last of the three findings chapters, I summarise the final 'theorising' phase of data analysis undertaken as part of my study. Figure 14 below provides a final reminder of how this phase of analysis fits within the wider analytical strategy.

Figure 14: How the 'theorising' phase fits within the wider analytical strategy



Based on: Crinson (2007); Fletcher (2017)

During the 'theorising' phase of analysis, I applied Archer's (1995) morphogenetic approach to the findings from my analysis of CfE policy texts and the interviews with policymakers. The 'theorising' phase of analysis was an important element of my research study's theoretical grounding in Critical Realism. As noted in chapter 5, Archer intended her morphogenetic approach to be a practical means of examining the interplay of structure, culture, and agency over time. The basic premise of the approach is that these three elements are analytically separable, although they act together. Archer's morphogenetic approach highlights the importance of considering how social actors are placed at the beginning of any morphogenetic cycle that the researcher is interested in. She also emphasises the important ways that the existing cultural and structural context will influence subsequent social or socio-cultural interaction. Using Archer's

morphogenetic approach allowed me to embed Critical Realism's two distinctive explanatory logics within my study. As noted in chapter 5, these explanatory logics are 'abduction' and 'retroduction' (O'Mahoney & Vincent, 2014). Abduction involves re-framing a set of findings in a more abstracted way, usually informed by the researcher making links to the literature or to theoretical concepts. Retroduction involves the researcher theorising about the underlying, non-deterministic mechanisms that Critical Realism suggests will underpin observed events. Through applying Archer's morphogenetic approach, I was able to look at the findings of my earlier data analysis in a new light (abduction). Similarly, the morphogenetic approach allowed me to theorise about the cultural and structural contexts for Curriculum for Excellence (CfE) policy, and to suggest how these contexts may have gone on to influence change over time (retroduction).

In the sections below, I begin by using Archer's concept of 'first order emergents' to explore how effectively Scottish curriculum policymakers were likely to have been able to 'steer' CfE policy. I move on to explore the main cultural ideas about 'equity' brought together within CfE policy, and then consider how structural relationships may have helped or hindered the realisation of the policy goals that are relevant to this study. Finally, I provide a summary of the cultural and structural morphogenetic cycles which appear to have been in play.

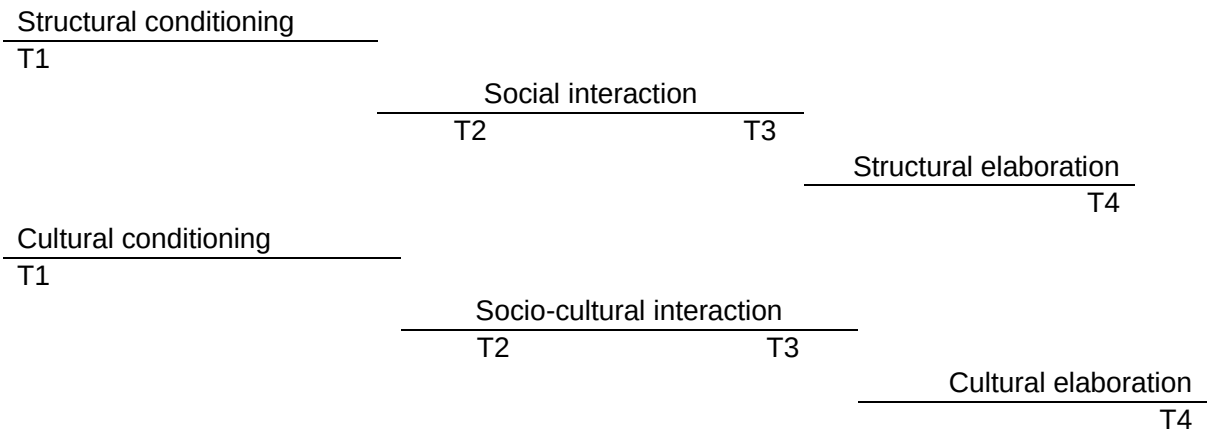
8.2 The morphogenetic approach: First order emergents

8.2.1 Introduction

As outlined in chapter 5, Archer's (1995) morphogenetic approach suggests that three analytical categories - structure, culture, and agency - can best be examined over different time periods.

Figure 15 below again reproduces one morphogenetic cycle (with, as in chapter 5, 'T' standing for 'time').

Figure 15: The morphogenetic cycle



Source: Archer (1995)

Archer (1995) begins by considering the 'first order emergents' - which she terms "wealth", "sanctions", and "expertise" - in play at the beginning of any morphogenetic cycle, at T1. These resources are distributed in particular ways at T1 because of social and socio-cultural interaction that has occurred during previous morphogenetic cycles. Social groups with the highest levels of access to these three resources are in the best position to achieve their goals. The main social group of interest for my study is curriculum policymakers within Scotland - comprising the Scottish Government (Scottish Executive prior to 2007), national education agencies, such as the inspectorate, and other individuals involved in working groups that were significant to the development of Curriculum for Excellence (CfE). These policymakers correspond to the macro site of curriculum making described in chapter 1 (Priestley et al., 2021). I selected 2004 as the likely starting point (T1) for the morphogenetic cycle(s) represented by CfE, as it is the point when the first set of policy documents explaining the new policy were published. The following sections consider the extent to which the education policy community had access to the three kinds of resources outlined by Archer at this time. Unlike later sections of this chapter, they present some new data from the interviews. These data are relevant here as I did not explicitly consider the topics of wealth, sanctions, and expertise in chapter 7 (as this chapter reported on the largely inductive analysis of the interview data).

8.2.2 Access to wealth

For the purposes of this study, I defined Archer's concept of 'wealth' as the financial resources needed to run the public education system and implement a new curriculum policy. It is reasonable to assume that curriculum policymakers had high levels of access to financial resources. For instance, the Scottish Government provides public funding for the school education system via local authorities (Redford, 2013). Two interviewees (4 and 8) did note that CfE was originally conceived at a time when public sector budgets were increasing, but that its enactment took place in an environment of constrained resources because of the financial crisis beginning in 2007-08, as exemplified below.

> *"And of course there's all the background, in the period from 2010 onwards, to do with constrained resources, all of that period when, you know, the time of plenty, which was around the time of McCrone, early part of the century, if we'd had that time of plenty in that later period then a lot of things may have been possible in terms of providing support to the profession, which just were hard to do given the financial constraints".* (Interviewee 8)

As highlighted in this extract, the Scottish Executive/Government did not have complete control over the level of financial resources it could access. These were driven by both global financial events and a UK Government policy decision to pursue 'austerity' following the financial crisis. These events had led to a shift from a time of financial "plenty" in the early years of the 21st century, to a more financially constrained position from 2010 onwards. Despite these later constraints, however, Scottish curriculum policymakers appear to have been in a uniquely strong position in relation to their access to 'wealth'.

8.2.3 Access to sanctions

I have defined Archer's (1995) concept of 'sanctions' as the scope that curriculum policymakers had to steer the education system in their own preferred direction. There was some evidence within the interview data that the education policy community wished to expand this scope in the post-devolution period. There appeared to be several influences on this. One of these was political devolution itself - in place from 1999. Five interviewees (4, 5, 8, 11, and 12) highlighted the desire of the Scottish Executive to exert increased political control over education policy, as shown in the following extract.

> *"Where it* [the National Debate on Scottish Education] *came from is more difficult to say. Most policy has several drivers. I would highlight the newish devolved Parliament and perhaps the wish to exert more political influence and control over education professionals who were maybe seen as a bit complacent with the lack of political scrutiny and intervention pre-devolution; the genuine desire on the part of some policymakers to improve matters; and political party advantage for Labour in the forthcoming Scottish elections".* (Interviewee 11)

The interview data suggest that another relevant factor underpinning policymakers' increased interest in steering the curriculum in Scotland may have been a desire to put in place a different set of curriculum arrangements from England. Eight interviewees (2, 4, 5, 6, 8, 9, 11, and 14) mentioned Scotland's educational distinctiveness from England, and there was some evidence that this had prompted policy thinking around the need for CfE, as shown in the two extracts below.

> *"[…] there was this feeling I think that we needed something distinctive, […] different from England and Wales, […] there were some very, very good people at that time working in education who, as I say, had this positive feeling that we needed to do something really special."* (Interviewee 5)

> "*I mean it's* [CfE] *very, very different from anything you would have seen developing south of the border, put it that way, you know that the values would be embedded in what we were doing and that we would think about it from the point of view of all individual young people and what we could do for them".* (Interviewee 9)

Data relating to the establishment of the National Debate on Scottish Education, which preceded CfE, also demonstrates a desire on the part of policymakers to exert control over the educational agenda. Interviewee 1 specifically considered the origins of the Debate in early 2002 and highlighted that it had been driven mainly by political considerations, as exemplified below.

> *"There was a debate which the Scottish Parliament initiated into the purposes of education […] and in an attempt to kind of outflank the Parliament the then education minister […] Jack McConnell started up the National Debate, which was therefore the Government's debate or the Executive's as they called themselves at that time […]".* (Interviewee 1)

This sense that policymakers wished to extend the scope of their influence in the early years of the 21st century could also be seen in data about the way in which they used the findings of the National Debate to inform further policy development. There was some evidence from the interviews (Interviewees 9 and 11) that policymakers saw the National Debate as providing a mandate for wider change - as illustrated below.

> *"The Minister at the time was very keen to do something that would really do much more than just address the National Debate outcomes. So that was good and it allowed us to think a little bit more openly about what we might do […]"* (Interviewee 9)

> *"[…] Peter Peacock at that time was Education Minister, who had a Community Education background, and again I think was really interested in these matters. Not all education ministers are interested in education! But he certainly was and… so there were people there who were predisposed to do things […]".* (Interviewee 11)

However, the literature considered in chapter 4 indicates that the education policy community's ability to set its own course was limited. For instance, in the 1990s previous proposals to introduce national testing, linked to the 5-14 curriculum, met fierce opposition from organised groups of parents, and teaching unions (Munn, 1995). As a result, the pre-devolution Scottish Office took a more consensual approach to the use of tests, with teachers able to exercise judgement about the timing of their use. There was also no national publication of data which could be used to produce "league tables" of schools (Munn, 1995). The interview data presented in chapter 7 align with this literature, as they also provided evidence of the incomplete achievement of several important policy goals for CfE.

In summary, it appears that curriculum policymakers had a large amount of scope to steer the education system in their own preferred direction. The interview data suggested that there was an increased appetite to do this among policymakers working in the post-devolution period. However, the literature and interview data also suggest that policy change required support from other stakeholders within the system - meaning that curriculum policymakers had strong, but not complete, control of 'sanctions'.

8.2.4 Access to expertise

I defined Archer's (1995) concept of 'expertise' as the knowledge required to develop and enact a new kind of curriculum policy for Scotland. Data from seven interviewees (3, 4, 7, 8, 9, 11, and 15) highlighted that the development of CfE was different in scale, scope, and ambition from any previous curriculum development process in Scotland - as illustrated by the following extracts.

> *"[…] you know this is the first time we've ever attempted in Scottish education to change the whole curriculum at once, you know, from three to 18. Now in the past we've touched on bits of the curriculum, you know, like Standard Grade, which*

> *was effectively S3 and S4. And then we'd 5-14, which was basically the primary curriculum and to some extent a bit in S1 and S2. We've tended to take kind of bite size chunks of the curriculum and change it. This is the first time we've ever taken the whole three to 18 curriculum and said it needs an overhaul".* (Interviewee 3)

> *"[…] because we were thinking across from three to 18,* [a Senior Civil Servant] *was very keen that we shouldn't be continually having curriculum review after review after review, and that if you had a set of principles and purposes, then that should stand the test of time, and that there should be some sort of seamlessness about the provision that was on offer, […] that was the aspiration".* (Interviewee 11)

These extracts illustrate both the ambition inherent in CfE from the outset, but also the scope of the challenge in enacting the policy. As noted in chapter 4, the previous curriculum reform in Scotland - the 5-14 curriculum - had been heavily influenced by English education policy in the 1980s. CfE therefore represented the first time that there had been an attempt to create a distinctively 'Scottish' curriculum. Another characteristic of CfE also added to the scale of the 'expertise' challenge - namely that Scotland was among the first countries in the world to introduce a curriculum which combined input deregulation and output regulation (albeit with some attempts to realise output deregulation at national level). Chapter 4 highlighted that these new, hybrid curriculum models have been termed the new curriculum frameworks (Priestley, 2011). Chapter 7 demonstrated that CfE clearly possessed the hallmarks of these curriculum frameworks. Therefore, Scotland was less likely to be able to draw on a large amount of existing knowledge about how (or if) such hybrid curriculum policies could best be enacted. This lack of existing knowledge at the outset of CfE is highlighted in the following extracts.

> *"And I think the likes of Wales and some of the other countries in the world that are making changes, that have come to see Curriculum for Excellence, are benefitting from all of that. You know a lot of the elephant traps that we fell into… because we were ahead of the game, I don't think there's any doubt about it."* (Interviewee 3)

> *"[…] I think* [Scotland was] *probably amongst one of the earlier countries to look at purposes for the curriculum, so we did a lot of work looking at different ways of looking at the curriculum at the time, as we put it high performing countries, and had a think about that and looked at all of the research that was available to us at the time, to try to make something from all of that that would be distinctively Scottish […]."* (Interviewee 9)

It is possible, therefore, that curriculum policymakers were in a weaker position in relation to their access to knowledge about how to enact an ambitious curriculum reform

with CfE's specific characteristics - when compared to their access to financial resources and sanctions. It is also likely that no other stakeholders were in a more advantaged position in being able to access such knowledge. Despite this, the education policy community's comparatively weaker position in relation to policy 'expertise' may have increased the potential for later risks to CfE's development.

8.2.5 Summary of potential first order emergents

Archer (1995) highlights that the first order emergents in place at the outset of any morphogenetic cycle will influence later social and socio-cultural interaction. In the case of CfE, the previous sections have indicated that Scottish curriculum policymakers did not have complete access to wealth, sanctions, or expertise in 2004. It appeared likely that they may have had strongest access to wealth, strong, but not total, access to sanctions, due to the existence of other stakeholders with their own agendas, and comparatively weaker access to the expertise required to develop and enact an ambitious and innovative curriculum reform with CfE's specific characteristics. These likely first order emergents suggest that curriculum policymakers were faced with a series of opportunities, but also some risks and opportunity costs, when beginning to develop CfE. The main implication for further morphogenetic cycles is that developing and enacting CfE is likely to have required compromise with other stakeholders to achieve their policy goals (Herepath, 2014). In the next section, I will now move on to consider the cultural relationships inherent in incorporating different framings of 'equity' within CfE policy.

8.3 The morphogenetic approach: Second order emergents - cultural forms

8.3.1 Introduction

As noted in chapter 5, Archer's (1995) morphogenetic approach aims to reconstruct cultural or structural alignment at the beginning of any morphogenetic cycle, and then explore how this influences subsequent socio-cultural interaction. Archer notes that particular relationships between cultural forms will generate 'situational logics' which predispose particular courses of action. Figure 16 below has been reproduced from chapter 5 and shows the four archetypal sets of relationships between cultural forms that Archer identifies; plus, the situational logics they are likely to generate, and whether

cultural morphostasis (lack of change) or cultural morphogenesis (change) is the more likely outcome.

Figure 16: Potential relationships between cultural forms

COMPLEMENTARY	**Necessary complementarities:** two sets of cultural forms are both logically consistent and interdependent. *Generate a situational logic of…* **Protection:** strengthening relationship between cultural forms but resistance to new ideas from outside (artificial stabilisation). *Tends towards…* **Cultural MORPHOSTASIS**	**Contingent complementarities:** two sets of cultural forms are logically consistent, but it is possible to uphold one without the other. *Generate a situational logic of…* **Opportunism:** possible to produce novel combinations of both cultural forms. *Tends towards…* **Cultural MORPHOGENESIS**
CONTRADICTORY	**Necessary contradictions:** two sets of cultural forms are logically inconsistent but (for whatever reason) it is important for someone to uphold them both. *Generate a situational logic of…* **Correction:** of the relationship between contradictory cultural forms - through reinterpretation of one, other, or all of them. *Tends towards…* **Cultural MORPOHSTASIS**	**Contingent contradictions:** two sets of cultural forms are logically inconsistent, but it is possible to uphold one without the other. *Generate a situational logic of…* **Elimination:** remove one cultural form - actors accentuate the differences between them. Battle ground of ideas. *Tends towards…* **Cultural MORPHOGENESIS**
	NECESSARY	**CONTINGENT**

For Archer (1995) these cultural relationships are ‘second order emergents’, which go on to shape the situations in which agents attempt to realise their goals by making some interaction strategies more or less appealing (Herepath, 2014). As noted in chapter 5, policy ideas can be usefully considered as cultural forms (Priestley & Miller, 2012). The cultural forms explored in this section are the three main framings of ‘equity’ within CfE policy which emerged from the analysis described in chapters 6 and 7. These three framings are all cultural in nature - they are ideas about ‘equity’ within national policy texts, and as expressed through interviews with influential education policymakers.

Critical Realism reminds us that individuals’ interpretations of reality - including such cultural forms - may not accord with the underlying mechanisms that influence them (O’Mahoney & Vincent, 2014). Chapter 7 has already suggested there were elements of post-hoc rationalisation in interviewees’ accounts, for instance the extent to which

'equity' was an explicit driver of Curriculum for Excellence (CfE) policymaking from 2004 onwards. However, at the same time, there appears to be enough evidence from both the analysis of policy texts and multiple interviews to indicate that these three framings were present within CfE policy. Therefore, it appears warranted to consider the kinds of relationships between them, to explore whether this can help to explain the shifts in interpretations of 'equity' which are the focus of this study. As set out at the end of chapter 7, the three cultural forms of interest within CfE policy are as follows.

- Cultural form A: 'Curriculum for all' (most closely related to 'Equity 1')
- Cultural form B: 'Curriculum differentiation' (most closely related to 'Equity 2')
- Cultural form C: 'Curriculum accountability' (most closely related to 'Equity 5')

I will now consider how these three cultural forms related to the likely existing cultural context in 2004, and then move on to explore subsequent inter-relationships between them - using Archer's (1995) work as a guide.

8.3.2 How did the three cultural forms relate to the existing cultural context?

Cultural form A - 'curriculum for all'

There was evidence from the interviews that the idea of a 'curriculum for all' was shared by both the 5-14 curriculum and CfE. For instance, policymakers located CfE within a continuum of policy attempts to ensure a "common curriculum" from the 1980s onwards and suggested that an entitlement to such a curriculum was an element of both the 5-14 curriculum and CfE. The interview data also suggested that policymakers in the early 2000s had a strong "cultural memory" of equality. Therefore, 'curriculum for all' appears to reflect older cultural ideas about the nature of Scottish education which, as noted in chapter 1, can be traced back to the ambition to establish a school in every parish in the 16th century. This evidence allows me to suggest, informed by Archer (1995), that there was a **complementary and necessary** relationship between cultural form A ('curriculum for all') and the previous cultural context. The complementary relationship occurs as both cultural forms emphasised the same core message - that the Scottish curriculum is 'for all'. The necessary relationship emerges because the data suggest it was important to policymakers that CfE was not seen to be totally disconnected with previous curriculum

policy, especially as other ideas within CfE were very different from the preceding cultural context. This relationship between the previous cultural context and 'curriculum for all' therefore appears likely to have generated a situational logic of **protection,** which suggests that the easiest course of action is to strengthen the relationship between both cultural forms. At the same time, it becomes important to resist any new ideas which could jeopardise this relationship.

Cultural form B - 'curriculum differentiation'

The relationship between cultural form B ('curriculum differentiation') and the preceding cultural context can also be explored using Archer's (1995) morphogenetic approach. However, here a different set of cultural relationships seems to be in play. The interview data suggested that 'curriculum differentiation' was a new cultural form within CfE, which did not display strong conceptual links with the previous cultural context within the 5-14 curriculum. The data emphasised policymakers' strong commitment to making the curriculum more tailored and learner-centred, as well as their belief that CfE could be contrasted with the previous, more tightly regulated, 5-14 curriculum. It was also clear from the interviews that policymakers felt they had been successful in introducing this new cultural form within CfE policy - through features such as the experiences and outcomes, in which disciplinary content knowledge had a much less central role. These data allow me to suggest that there was a **contradictory** and **contingent** relationship between 'curriculum differentiation' and the preceding cultural context. The contradiction appears to arise from the logical disconnect between CfE's vision of a tailored, locally relevant curriculum and the previous tighter regime of curriculum input regulation under the 5-14 curriculum. The contingent relationship appears to emerge from the fact that, unlike 'curriculum for all', policymakers did not see the value in maintaining cultural continuity with the past. Archer (1995) suggests that this kind of relationship between cultural forms will generate a situational logic of **elimination**. She contends that this is most likely to generate competition between social groups, with pressure on them to choose between the old and new cultural forms.

Cultural form C - 'curriculum accountability'

Initially, the interview data appeared to highlight that 'curriculum accountability' may have been a new cultural form that emerged within CfE policy more strongly after 2015.

Several interviewees expressed concerns that an increased focus on 'curriculum accountability' post-2015 could make it harder to realise 'curriculum differentiation', for instance by increasing the risk of curriculum narrowing to a focus on literacy and numeracy or on 'curriculum interventions'. The literature considered in chapter 3 would also support a view that increases in curriculum output regulation are likely to inhibit the scope for 'curriculum differentiation', due to the negative impacts output regulation has on school and teacher autonomy (Sinnema et al., 2021). There was also support for the interpretation that 'curriculum accountability' was a new cultural form within CfE from the analysis of policy texts - for instance references to 'equity' defined in relation to measured attainment gaps were more frequent within texts published after 2015.

However, the interview data also challenged a simple explanation that the curriculum output regulation approaches associated with 'curriculum accountability' were distinct to the post-2015 period - and therefore that 'curriculum accountability' *was* really a 'new' cultural form. There was evidence that Scotland's testing and examinations system had had a cultural impact on attempts to realise 'curriculum for all' and 'curriculum differentiation' within CfE. The interview data suggested that, at the outset of CfE, policymakers had been concerned about an over-emphasis on testing and examinations. Therefore, they had been keen to ensure that these considerations did not drive the development of CfE. However, several interviewees also referred to the cultural importance of examinations as a force for "inertia" within the system - and as the key indicator which determined schools' inspection results. Interestingly, the interview data also suggested that, by 2008, policymakers had come to see reform of Scotland's qualifications as a *means* of realising curriculum change in secondary schools - to make learning more engaging, facilitate skills development, and reduce the number of qualifications taken. Policymakers' readiness to adopt qualifications reform as a driver of change also leads me to suggest that 'curriculum accountability' was not a new cultural form within CfE.

Therefore, we appear to have a situation in which 'curriculum accountability' formed an important part of the *preceding* cultural context for CfE (as well as re-emerging as a cultural form after 2015). If this is the case, then attempts to realise curriculum output deregulation after 2004 (with a reduced emphasis on testing and examinations) will have existed in a **contradictory** relationship to an existing culture of performativity. In

addition, there is likely to have been a **contingent** relationship between the existing strong culture of 'curriculum accountability' in 2004 and these policy goals focused on output deregulation, due to policymakers' desire to make a cultural break with the past. This kind of relationship is therefore likely to have generated a situational logic of 'elimination' - with subsequent pressure to choose between 'curriculum accountability' and CfE's policy goals.

In summary, therefore, the potential relationships between cultural forms A, B, and C within CfE policy and the preceding cultural context in 2004 can be summarised as follows.

- 'Curriculum for all' (cultural form A) within CfE had a **complementary and necessary** relationship with older cultural ideas about equality of access to Scottish education, and the fact that the 5-14 curriculum was also seen as a 'curriculum for all'.

- 'Curriculum differentiation' (cultural form B) within CfE had a **contradictory and contingent relationship** with the older approach to curriculum input regulation within the 5-14 curriculum.

- 'Curriculum accountability' (cultural form C) was not a new cultural form in the post-2015 period, but already existed in 2004. Therefore, CfE's attempts to realise curriculum output deregulation also had a **contradictory and contingent** relationship with the existing cultural dominance of testing and examinations.

I will now go on to consider the interplay between these three cultural forms from 2004 onwards, drawing on Archer's (1995) work to suggest whether they appear to have generated cultural morphogenesis or morphostasis.

8.3.3 Interplay between cultural forms within CfE from 2004 onwards

Cultural form A - 'curriculum for all'

As discussed in the previous section, cultural form A within CfE - 'curriculum for all - represented a point of continuity with the previous cultural context. Archer (1995) suggests that this kind of complementary and necessary relationship between cultural forms is likely to lead to a situational logic of protection, resulting in **cultural**

morphostasis, where both sets of cultural forms are maintained. From the interview data, this does appear to have occurred. 'Curriculum for all' did appear to have been largely maintained as an important cultural form within CfE policy, and even in 2019-20, interviewees emphasised that it was an important policy goal for CfE. Therefore, 'Equity 1' (equity defined in relation to access or opportunities for all) can also be seen as a consistent element within CfE policy since 2004.

Cultural form B - 'curriculum differentiation'

The previous section suggested that cultural form B - 'curriculum differentiation' - had a contradictory and contingent relationship with the preceding cultural context. Therefore, we would expect policymakers to have sought to eliminate the older cultural form - a view that the curriculum should be more uniform and centrally-defined - and replace it with the new emphasis on 'curriculum differentiation'. Archer (1995) suggests this will lead to cultural morphogenesis. In fact, there was some supportive evidence of cultural conflicts in relation to 'curriculum differentiation' within CfE. In particular, the interviews showed policymakers resisting attempts by stakeholders to question the place of disciplinary content knowledge (e.g. of Physics or Chemistry) within CfE. This does appear to illustrate the kinds of socio-cultural conflict Archer (1995) suggests we will see when a situational logic of elimination occurs. The interviews also provided support for the fact that **cultural morphogenesis** did occur - as 'curriculum differentiation' did appear to displace older ideas about the value of a more uniform curriculum. Interviewees pointed to specific examples of how the eventual form of CfE did allow for 'curriculum differentiation' - including the experiences and outcomes, its focus on teacher curriculum development, and its ability to be much more tailored to an individual's context and needs. 'Curriculum differentiation' also remained an important policy goal for interviewees in 2019-20, when the interviews were carried out. In fact, senior policymakers continued to emphasise the importance of elements of 'curriculum differentiation' - such as teacher curriculum making - within the context of realising 'equity'. This suggests that 'Equity 2' (equity defined in relation to meeting individual needs) is also one of the cultural underpinnings of CfE policy.

However, there was also strong evidence that 'curriculum differentiation' had been a very difficult policy goal to achieve in practice. This appears to have been at least partly due to the ongoing influence of the preceding cultural context. As noted in chapter 4, the 5-

14 curriculum did not envisage a strong role for teachers as curriculum developers. The interview data indicated that this then emerged as a challenge for CfE policymakers - who highlighted the need for teachers to take on this role. Based on the interview data, it is plausible to suggest that policymakers were initially able to mask the difficulties in realising 'curriculum differentiation' within CfE policy at a cultural level - by continuing to present it as an unproblematic curriculum goal. The interviews showed that several socio-cultural strategies had been used to support CfE's focus on 'curriculum differentiation' - in particular the provision of further national curriculum guidance, and engagement events for the profession. It is also likely that the emergence of technical challenges with realising 'curriculum differentiation' took time to become apparent - due to the time lag between the initial thinking about CfE (c. 2004 onwards) and its use by schools (2010). If this interpretation is correct, it would suggest that the initial cultural morphogenesis - through which 'curriculum differentiation' became embedded within CfE policy - was then followed by a period of **cultural morphostasis**, or policy drift, during which the difficulties of realising 'curriculum differentiation' were not tackled. I will return to the structural challenges of achieving 'curriculum differentiation' below.

Cultural form C - 'curriculum accountability'

Above I suggested that 'curriculum accountability' appeared likely to have been an element of the preceding cultural context in 2004. Therefore, CfE policy's initial attempt to de-emphasise the importance of examinations and testing again appeared to have generated a contradictory and contingent relationship between cultural forms. If that is the case, this relationship would have generated a situational logic of 'elimination', in which policymakers would seek to remove one of the contradictory cultural forms - in this case 'curriculum accountability' - leading to cultural morphogenesis. There was some evidence from the interviews that policymakers had engaged in socio-cultural persuasion strategies that attempted to background the dominance of testing and examinations. For instance, policymakers remembered assurances that CfE policy development would not be driven by testing and examinations. However, the return to a cultural focus on 'curriculum accountability' after 2015, which also emerged from both sets of data, means it is unlikely that this cultural morphogenesis was longstanding. In Archer's terms, therefore, there is stronger evidence of a longer-term **cultural**

morphostasis between the period before 2004 and then from 2015 onwards - with some cultural change to downplay the role of examinations and testing between 2004 and 2015.

If this longer-term cultural continuity in the relevance of 'curriculum accountability' did exist, it is likely that there was always a disconnect between cultural form B ('curriculum differentiation') and a wider cultural context in which 'curriculum accountability' remained significant (even if it was not explicit within CfE policy until 2015). This allows me to suggest, drawing on Archer's (1995) morphogenetic approach, that 'curriculum differentiation' stood in a **contradictory** relationship with 'curriculum accountability'. Until 2015, this contradictory relationship was unlikely to have been activated *within* CfE policy, which backgrounded 'curriculum accountability' as an explicit goal of CfE. However, once 'curriculum accountability' became embedded as an explicit goal for CfE in 2015, the cultural contradiction would have been activated. As both cultural forms then existed in a **necessary** relationship (both presented as goals for CfE), these necessary contradictions are likely to have produced a cultural situational logic of **correction**. Policymakers are likely to have sought to uphold CfE as the ongoing curriculum policy (due to the likely political costs of changing course and amending the curriculum as originally framed) - including its focus on 'curriculum differentiation' - but also to meet the new political goal of 'closing the poverty-related attainment gap'. This suggests that 'Equity 5' (equity defined in relation to measured attainment) is currently an important element of CfE policy, but one which is also likely to be in conflict with 'Equity 2' (equity defined in relation to meeting individual needs).

The evidence from the interviews does support this reading of events, as it indicates that policymakers did adopt different strategies to 'correct' the now problematic relationship between 'curriculum differentiation' and 'curriculum accountability' within CfE policy in the post-2015 period. There was evidence of policymakers attempting to increase curriculum output regulation - which would have the effect of 'correcting' 'curriculum differentiation. However, this repair strategy did not appear to be focused on 'correcting' CfE policy itself. Instead, the data suggest that 'correcting' 'curriculum differentiation' may have been achieved through the introduction of other cultural forms (policies) which may have had the effect of increasing curriculum output regulation. These other output regulation policies included a return to standardised assessments, and a renewed focus on measured attainment in literacy and numeracy.

Archer (1995) suggests that socio-cultural interaction focused on correction of one set of cultural forms tends towards morphostasis. In the data considered above, we can see some elements of cultural morphostasis, with an ongoing emphasis on 'curriculum differentiation' as a core element of CfE policy, and limited attempt to address its inconsistencies with 'curriculum accountability'. There was no evidence of a formal policy change away from an emphasis on 'curriculum differentiation'. However, elements of cultural morphogenesis can also be observed through the introduction of the wider policy changes mentioned above, which can be seen as attempts to 'correct' 'curriculum differentiation'. Therefore, we could perhaps best describe the resulting socio-cultural interaction between 'curriculum differentiation' and 'curriculum accountability' as having produced a form of **partial or hybrid cultural morphogenesis**, where the original idea is maintained alongside a new one (Priestley & Miller, 2012).

8.3.4 Summary of cultural analysis

The analysis outlined above focused on three main cultural forms relating to 'equity' expressed through CfE policy. Using Archer's (1995) morphogenetic approach, I considered the relationships between the following three cultural forms.

- Cultural form A: 'Curriculum for all'
- Cultural form B: 'Curriculum differentiation'
- Cultural form C: 'Curriculum accountability'

In summary, this section has suggested that cultural form A ('curriculum for all') was well aligned with the preceding cultural context and therefore generated a situational logic of protection. In other words, policymakers emphasised the continuity between CfE policy and this older set of ideas, leading to **cultural morphostasis**.

However, cultural form B ('curriculum differentiation') stood in contradiction to the existing cultural context - as CfE aimed to introduce a more tailored, locally relevant curriculum. The incorporation of this new cultural form within CfE generated a situational logic of elimination, which led policymakers to seek to discredit the central control of curriculum content which was inherent within the existing 5-14 curriculum. This led to cultural **morphogenesis** - in which 'curriculum differentiation' replaced older

ideas about a more uniform curriculum. However, following this point there was evidence of **cultural morphostasis**, as cultural repair work was undertaken to address the challenges involved in realising 'curriculum differentiation'.

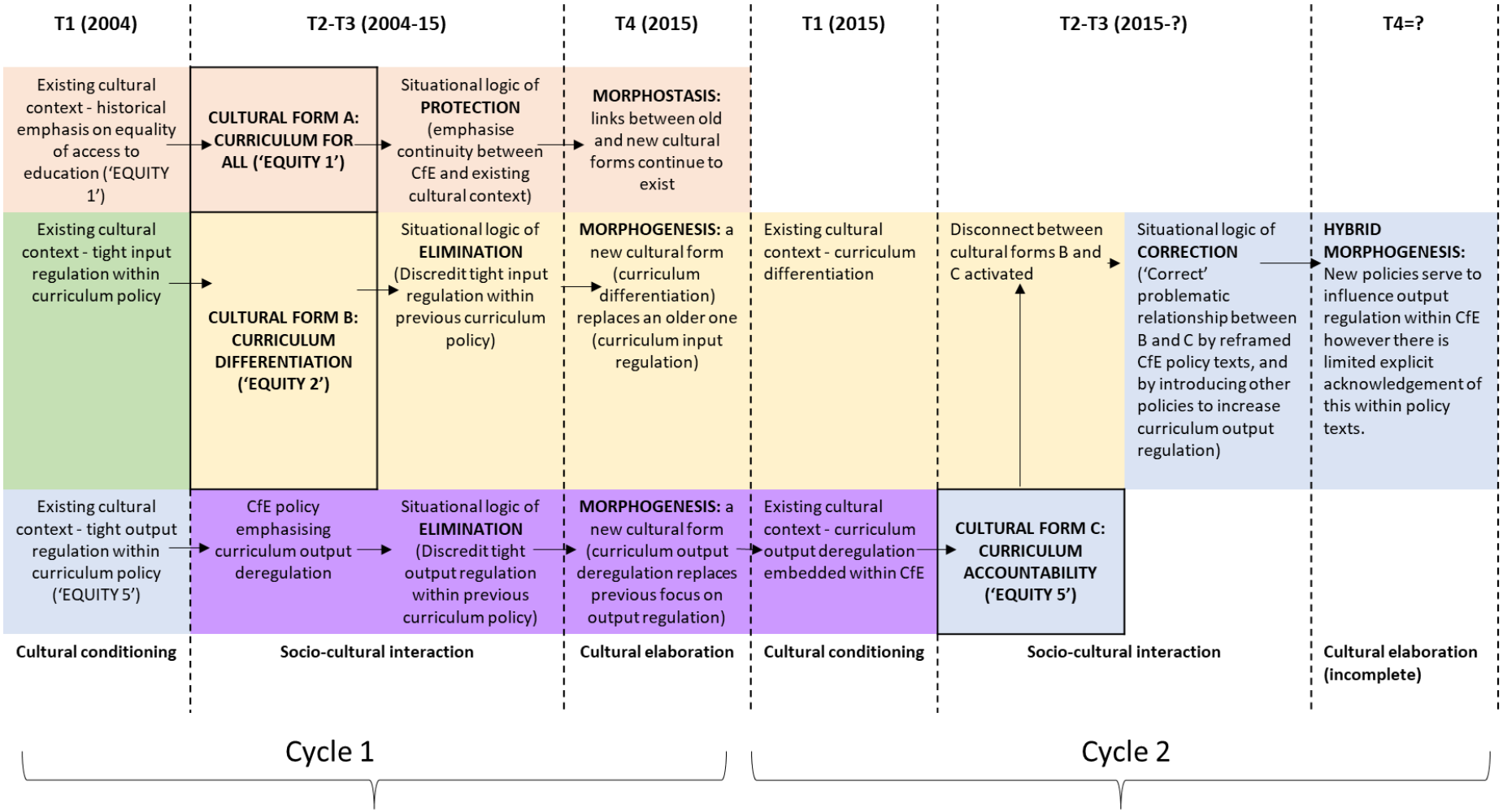
Cultural form C ('curriculum accountability') appeared to be a very strong element within the cultural context that preceded CfE. However, it stood in contradiction to policymakers' aims to reduce the influence of curriculum output regulation. The disconnect between both cultural forms also generated a situational logic of elimination - in which policymakers sought to realise a new approach to curriculum output regulation - leading to initial **cultural morphogenesis**. However, the deep-rooted culture of curriculum accountability appears to have persisted. In 2015, 'curriculum accountability' re-emerged as a cultural form within CfE policy, indicating a longer term **morphostasis** in the importance of this cultural form within Scottish education. Embedding 'curriculum accountability' within CfE policy from 2015 also appeared likely to have activated its fundamental disconnect with 'curriculum differentiation'. This appears to have led to some attempts to 'correct' 'curriculum differentiation'. While 'curriculum differentiation' remains a stated policy goal of CfE, correction strategies within wider education policy may have included changes in approaches to output regulation, such as the increased collection of individual pupil level data and increased accountability for school-level strategies to raise attainment in literacy and numeracy.

Therefore, there appear to have been two main cultural morphogenetic cycles with relevance to equity in play within CfE policy. The first, from 2004 to 2015, saw 'curriculum differentiation' become an important element within CfE policy through a process of **cultural morphogenesis**. At the same time, there was apparent **cultural morphogenesis** as 'curriculum accountability' appeared to be backgrounded. Therefore, in theoretical terms there was a move to emphasise 'Equity 2', and de-prioritise 'Equity 5', within CfE policy. The second cycle, from 2015 onwards, intensified the contradictions between CfE policy's earlier focus on 'curriculum differentiation' (cultural form B) and its new emphasis on 'curriculum accountability' (cultural form C). To resolve the contradiction, I suggest that repair strategies focused on output regulation were undertaken to 'correct' curriculum differentiation - leading to further cultural morphogenesis. However, this morphogenesis is again incomplete, as it was not possible for policymakers to completely alter the previous focus on 'curriculum differentiation' -

due to the political costs of doing this. Indeed, policymakers appeared to remain committed to the goal of achieving greater 'curriculum differentiation'. Therefore, we see a kind of **hybrid morphogenesis** where other policies serve to influence CfE, while there is limited change within the original policy framework for CfE (textual morphostasis). In effect, 'Equity 2' and 'Equity 5' co-exist within CfE policy, generating a cultural inconsistency which requires significant policy work to address. During both cycles, cultural form A ('curriculum for all' - or 'Equity 1') remained as a point of continuity with the previous cultural context.

Figure 17 below summarises these two cultural morphogenetic cycles.

Figure 17: Visual summary of possible cultural morphogenetic cycles



8.4 The morphogenetic approach: Second order emergents - structural institutions

8.4.1 Introduction

Section 8.3 explored the cultural dimensions of this research study's data and suggested that there were two main cultural morphogenetic cycles between 2004 and 2020. In this section, I will now consider the empirical data collected in relation to structures. As chapter 5 highlighted, for Archer (1995), structures are analytically separate from culture. Archer theorised four main relationships between structural institutions, and the potential situational logics they will generate. Figure 18 below is reproduced from chapter 5 as a reminder of Archer's suggested relationships between structural institutions, the situational logics these relationships will generate, and whether they are ultimately likely to generate structural morphogenesis or structural morphostasis.

Figure 18: Potential relationships between structural institutions

	NECESSARY	CONTINGENT
COMPLEMENTARY	**Necessary complementarities: o**ne institution cannot exist without the other, and their operations are mutually reinforcing. *Generate a situational logic of…* **Protection:** each institution has something to lose from change. *Tends towards…* **Structural MORPHOSTASIS**	**Contingent complementarities: o**ne institution does not require the other to exist, but their operations are mutually reinforcing. *Generate a situational logic of…* **Opportunism:** the institutions form new kinds of relationships to take advantage of their shared interests. *Tends towards…* **Structural MORPHOGENESIS**
CONTRADICTORY	**Necessary contradictions: o**ne institution cannot exist without the other, but the institutions challenge each other's operations. *Generate a situational logic of…* **Correction:** each institution promotes its own vested interests but has to balance this against potential losses. *Tends towards…* **Structural MORPHOSTASIS**	**Contingent contradictions:** One institution does not require the other to exist, and the institutions challenge each other's operations. *Generate a situational logic of…* **Elimination:** each institution realises that the greatest gains will come from eliminating the other one. *Tends towards…* **Structural MORPHOGENESIS**

8.4.2 Potential structural incompatibilities in achieving policy goals

Chapter 7 has shown that the main policy goals of interest to this study were related to the technical form of the curriculum - in particular to curriculum input and output regulation (Luke et al., 2012; Nieveen & Kuiper, 2012). These policy goals were as follows.

- **Policy goal 1:** From 2004 onwards, policymakers sought to realise curriculum **input deregulation** through CfE policy, by enacting a curriculum which specified content knowledge in a less detailed way (removing time allocations for particular subjects, writing less detailed experiences and outcomes etc).

- **Policy goal 2:** From 2004 onwards, policymakers sought to realise curriculum **output deregulation** (by removing national tests, emphasising the value of national monitoring of attainment etc.).

- **Policy goal 3:** From 2015-16 onwards, policymakers sought to realise curriculum **output regulation** (by introducing national standardised assessments, new processes for reporting on 'attainment gaps' etc.).

Section 8.2, which considered the first-order emergents likely to have influenced curriculum policymaking, highlighted that policymakers had a strong ability to achieve these goals - primarily through their access to financial resources and sanctions. At the outset of Curriculum for Excellence (CfE), because of the new format of the curriculum and the scale of change required, they arguably stood in a weaker position in relation to their access to knowledge about how to enact the desired curriculum changes.

However, the analysis of first-order emergents also highlighted that curriculum policymakers required support from other actors within the education system to realise their policy goals. For instance, curriculum input deregulation required teachers to engage in curriculum making activity. In the same way, increasing curriculum output regulation required teachers' and parents' support for policy changes such as the introduction of standardised assessments. Therefore, in Archer's (1995) terms, there would appear to be a **necessary** relationship between curriculum policymakers and the other structural institutions and groups required to realise their policy goals. This is likely to have characterised all the three CfE policy goals mentioned above.

There also appear to be differences in the extent to which there was a necessary or a contingent relationship between the structural institutions or groups required to achieve the three CfE policy goals. For goal 1, there appeared to be clear evidence of **incompatibilities** at a structural level. For the other two goals - those related to output regulation and deregulation - the situation was more complex. I will now describe the potential incompatibilities and compatibilities between structural institutions involved in realising the three CfE policy goals of most relevance to equity, along with any evidence relating to subsequent structural morphogenesis or morphostasis.

Policy goal 1: Curriculum input deregulation

Policy goal 1 appeared to have the clearest structural incompatibility between the institutions involved in its realisation. The previous 5-14 curriculum represented strong curriculum input regulation. Section 8.2 suggested that this led to a cultural contradiction in ideas about the extent to which the curriculum should be uniform. The interview data also suggest that the 5-14 curriculum generated structural incompatibilities with CfE. In particular, the data emphasised that the 5-14 curriculum had structural consequences for teachers' curriculum design capacity. The data also indicated that interviewees felt that insufficient attention had been paid to addressing this structural incompatibility - for instance through the engagement model adopted for CfE. Archer's (1995) work suggests that the necessary incompatibility between the structural context represented by 5-14 and CfE will have led to a situational logic of **correction** - in which it becomes important to address and amend the structural incompatibility. The interview data did suggest that there were attempts to address the structural legacy of the 5-14 curriculum on teachers' capacity for curriculum making. Interviewees mentioned changes to teacher education through the 'Teaching Scotland's Future' reforms. However, there was also some evidence that teacher curriculum making was still an unrealised policy aim as of 2019-20. This would appear to suggest that the structural incompatibility between policy goal 1 and teacher capacity for curriculum making had not been addressed - and that, as Archer suggests, there had been limited practice change, or **structural morphostasis**.

Policy goal 2: Curriculum output deregulation (up to 2015)

For policy goals 2 and 3 - which both relate to curriculum output regulation - structural incompatibilities appeared to result from shifting national policy positions on the collection and use of data. Policy goal 2 relates to attempts, from 2004 onwards, to facilitate curriculum output deregulation within CfE policy. The older approach, within the 5-14 curriculum, had been to use tighter systems of curriculum output regulation - such as a national testing programme. Within CfE, policymakers undertook activity to realise curriculum output deregulation, for instance through ending national testing and developing a more proportionate approach to monitoring system performance. This could be seen as evidence of structural morphogenesis - at odds with what Archer (1995) suggests will happen when necessary contradictions exist at the structural level (morphostasis). However, in section 8.2 I suggested that 'curriculum accountability' appeared to be a powerful cultural form within Scottish education. The literature also suggests that practices aligned to this cultural form did not disappear after 2004 (Spencer, 2013). For instance, there was continued use of standardised assessments at a local level and continued national and local political pressure to provide accountability evidence (Cowie et al., 2007; Spencer, 2013). The interview data also illustrated the persistence of these practices. Therefore, despite policy intentions to realise curriculum output deregulation within CfE, practices in relation to the use of the data generated at school, national and local levels may have been mutually reinforcing. Archer suggests that, in these scenarios, the relationship between structural institutions generates a situational logic of **protection**, in which each one has something to lose from change. Therefore, it is possible to suggest that there were elements of both structural morphostasis (lack of practice change) and structural morphogenesis (practice change) in relation to curriculum output deregulation. Arguably, due to the apparent persistence of cultures of performativity, it appears plausible to suggest that there was **structural morphostasis** in relation to curriculum output deregulation between 2004 and 2015 - meaning that the extent of practice change was limited.

Policy goal 3: Curriculum output regulation (from 2015 onwards)

It appears clear that, after 2015, policymakers attempted to increase curriculum output regulation. In section 8.3, I suggested that this was a socio-cultural repair strategy to 'correct' the problematic relationship between 'curriculum differentiation' and

'curriculum accountability'. If it is correct that curriculum output regulation remained an important part of existing curriculum making practice, even when CfE policy attempted to change this, then the structural changes policymakers wished to make after 2015 were in line with existing practices. Therefore, such structural alignment would have generated a largely complementary relationship between structural institutions - generating a structural logic of protection, in which everyone has something to lose from change. As noted above, Archer (1995) suggests relationships between structural institutions characterised by protection lead to morphostasis. Attempts to realise curriculum output regulation post-2015 therefore arguably represent **structural morphostasis** with the pre-2004 national policy position and ongoing output regulation practices between 2004 and 2015.

8.4.3 Summary of structural analysis

The analysis above focused on three policy goals of relevance to this study's focus on the curriculum and equity.

- Policy goal 1: Curriculum input deregulation
- Policy goal 2: Curriculum output deregulation (up to 2015)
- Policy goal 3: Curriculum output regulation (from 2015 onwards)

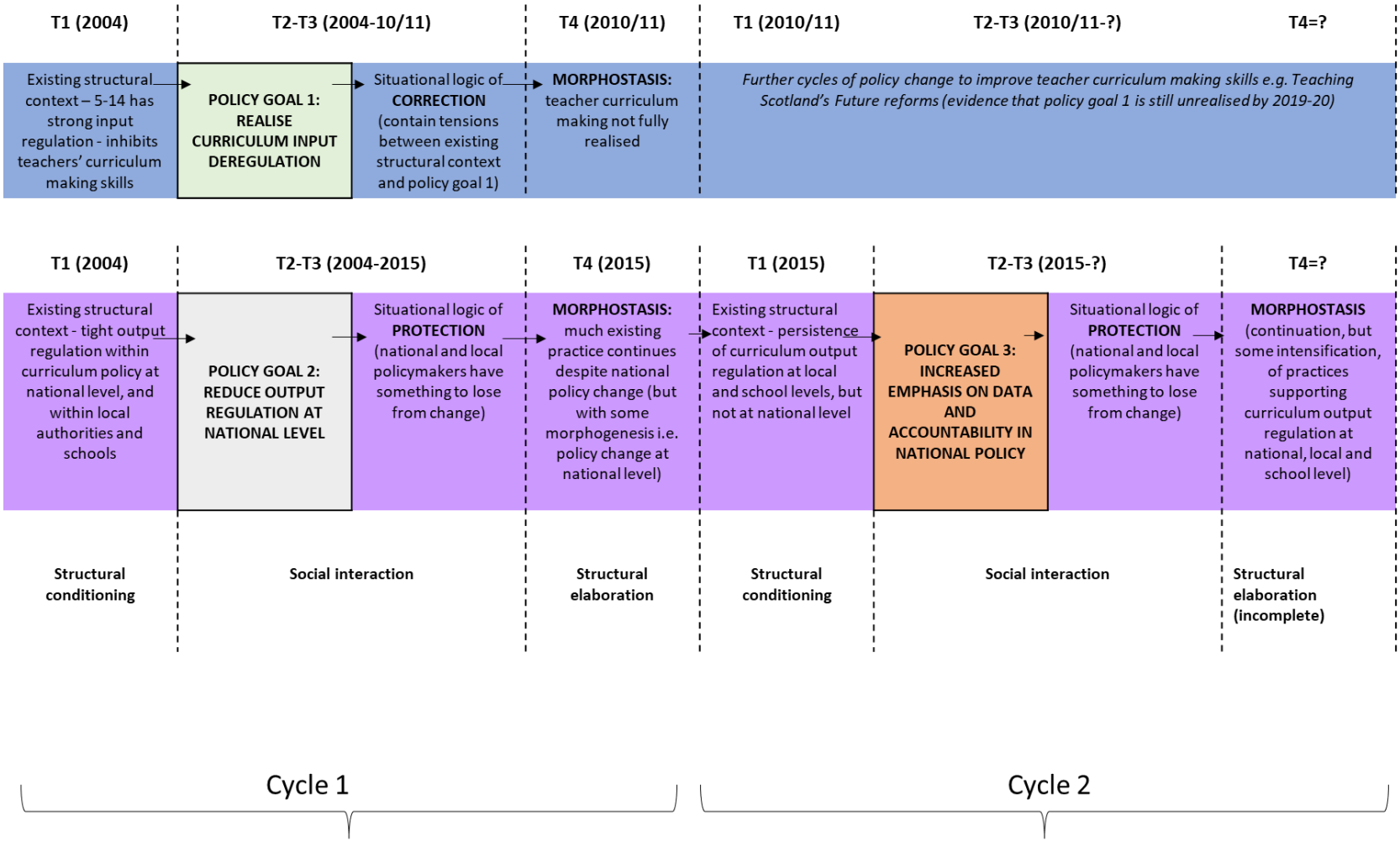
Using Archer's (1995) work on the relationship between structural institutions, I suggested that all three goals were characterised by a necessary relationship between national policymakers and other structural institutions (local authorities, schools, teachers etc.). For policy goal 1, relating to curriculum input deregulation, I suggested that there were structural incompatibilities generated largely by the previous 5-14 curriculum's lack of emphasis on teacher curriculum making, leading to structural morphostasis, or a lack of the practice change required to realise the policy goal. This generated a situational logic of correction - sparking further waves of policymaking to 'correct' the structural incompatibility and realise the policy goal.

For policy goals 2 and 3, I suggested that there had been an overall continuity in the underlying cultures of performativity, and in curriculum making practices focused on output regulation, between 2004 and 2019-20. As a result, when considering CfE policy

over this period there was a large degree of structural morphostasis - with limited change in the existence of accountability pressures, often influenced by local and national demands for data. There was some evidence of structural morphogenesis in the period from 2004 to 2015, when national policy attempted to reduce and streamline assessment and accountability pressures. However, it appears more plausible to identify some structural loosening and then a subsequent tightening of curriculum output regulation during the lifetime of CfE, rather than a high level of structural morphogenesis.

Figure 19 below provides a summary of the structural morphogenetic cycles theorised in this section.

Figure 19: Visual summary of possible structural morphogenetic cycles



8.5 Discussion of cultural and structural morphogenetic cycles

Using Archer's (1995) morphogenetic approach has allowed me to consider potential cultural and structural influences on the ways in which different framings of equity were realised within CfE policy, as well as to suggest how subsequent socio-cultural and social interaction may have played out. I have identified several possible morphogenetic cycles where structural and cultural change has not been in synch. In summary, we appear to have seen a higher level of cultural morphogenesis in different framings of equity being combined within CfE policy, alongside structural morphostasis in the kinds of practice change which would realise them. I have suggested that the main elements of cultural morphogenesis were as follows.

- Embedding a new cultural form - which I termed 'curriculum differentiation' (underpinned theoretically by 'Equity 2') - within CfE policy from 2004 onwards.

- Embedding another cultural form - which I termed 'curriculum accountability (and which reflected 'Equity 5') - within CfE policy from 2015 onwards (however recognising that it appeared likely there was cultural continuity with the pre-2004 period).

I have further suggested that the main elements of structural morphostasis were as follows.

- Limited practice change in realising the policy goal of curriculum input deregulation from 2004 onwards.

- Limited practice change in realising the policy goal of curriculum output deregulation from 2004 onwards.

- Some practice change in realising the policy goal of curriculum output regulation from 2015 onwards, but overall structural continuities with pre-2004 national policy (and practices between 2004 and 2015).

Archer (1995) reflects on morphogenetic cycles where, as seems to be the case above, there has been cultural morphogenesis but structural morphostasis. She notes that these situations are characterised by the persistence of a dominant "structural agent" and several "cultural […] agents" who support different cultural forms (Archer, 1995, p. 315).

Archer's further reflections on cultural morphogenesis and structural morphostasis are worth reproducing in some detail.

> *"[…] ideational diversification is totally dependent on differentiated groups who have enough power to introduce and then sustain pluralistic or specialised ideas. Structural restraints will delay their emergence. However, given the relative autonomy of the two domains [structure and culture], structural influences can restrain the emergence of new material interest groups but they can do no more than retard the development of new ideal interest groups.*
>
> *[…] Cultural morphogenesis not only means that ideational uniformity ceases to be produced, but what takes its place is a new fund of divisive ideas […]*
>
> *[…] the socially or institutionally dominant […] for the first time […] are presented with cultural alternatives and the ineluctable force of Pluralism is that they must now choose to come down on one side or the other. The cultural context has shifted beneath their feet and this means that there is no longer anything 'automatic' about the ideas they endorse and work with"* (Archer, 1995, pp. 316-317).

In these reflections, Archer suggests that a combination of cultural morphogenesis and structural morphostasis will allow different actors to introduce new ideas within the cultural system. This would include attempts to embed new cultural forms - such as 'curriculum differentiation', or 'Equity 2' - within CfE policy. However, the structural system is then able to resist (or, perhaps more accurately, to modify) such cultural change. She suggests that this will continue to generate conflict at the cultural level, leading to the erosion of previously shared meanings.

In respect of this project's data, Archer's work can be applied to suggest that new ideas that are relevant to equity - such as 'curriculum differentiation' - have found their way into Scottish curriculum policy. This can be seen as an example of what Archer terms "ideational diversification". There was a real sense within this project's data of - as highlighted in the extract above - the cultural context 'shifting beneath policymakers' feet'. Chapters 6, 7, and 8 have demonstrated the range and complexity of cultural forms which policymakers attempted to incorporate within CfE policy from 2004 onwards. A more 'traditional' Scottish cultural form, emphasising equality of educational access, has been combined with other sets of ideas including: international discourses about skills and competencies; post-devolution ambitions about Scottish citizenship and distinctiveness; OECD recommendations to increase curriculum output regulation; and, more recently, political priorities around 'equity'. As noted above, the different cultural

forms brought together within CfE policy included ideas underpinned by the different dimensions of the policy concept of 'educational equity' discussed in chapter 2 - namely 'Equity 1', 'Equity 2', and 'Equity 5'.

However, in addition to the inconsistencies which bringing these cultural forms together within CfE policy has generated - in particular the tension between 'Equity 2' and 'Equity 5' - there has been what Archer terms an important "structural brake" on the extent to which these cultural forms have been realised in practice. The data from this project suggest that there are at least two dimensions of this "structural brake": the continuation of practices related to performativity (which is the structural counterpart of 'Equity 5') and the continued legacy of tight input regulation within the 5-14 curriculum for teacher curriculum making. This project's data would also suggest that these have been important structural barriers to the extent to which even well-placed curriculum policymakers could achieve their policy goals.

Earlier in this thesis, I suggested that the most helpful interpretation of 'equity' was 'Equity 2', which focused on equitable individualisation in response to an individual's needs or characteristics (Schaffer & Lamb, 1981). Drawing on the literature, I also suggested that equity defined in this way was more likely to be realised in curricula whose technical form allowed for teacher adaptive professionalism (Luke et al., 2012) - although I acknowledged that teacher adaptive professionalism was a necessary but not a sufficient condition for realising equity. For instance, strong support for teachers as curriculum makers, and a well-articulated position on the teacher's role in selecting and communicating knowledge, were also important factors in the extent to which equity could be realised (with the latter also prompting consideration of situations when equity might not be the most important curriculum goal). The theoretical analysis within this chapter has suggested that it is also important to consider the role of structural factors in realising equity, as these can act as a 'brake' on the extent to which adaptive professionalism can be realised in practice.

8.6 Conclusion

Chapter 8 has applied Archer's (1995) morphogenetic approach to an analysis of data from Curriculum for Excellence (CfE) policy texts and interviews with policy makers. It described the final 'theorising' phase of this project's analytical framework. Using

Archer's work has allowed me to identify elements of cultural morphogenesis and structural morphostasis that are relevant to the extent to which CfE policy can be seen to provide scope to realise equity. I have suggested that a combination of structural morphostasis and cultural morphogenesis in relation to equity has been seen within CfE policy.

I will now move on to this thesis' final chapter, which offers an overall conclusion to the research questions posed in chapter 1 and considers the study's implications for both research and policymaking.

Chapter 9 - Conclusions

9.1 Introduction

In this concluding chapter, I first discuss recent policy change relating to Curriculum for Excellence. Then I return to the study's research questions and offer an overview of the main findings which relate to each one of them. Thirdly, I acknowledge the study's main limitations. I move on to highlight its valuable contribution to educational research. I next consider its implications for Scottish curriculum policymaking and make several recommendations before, finally, offering a conclusion to the whole thesis.

9.2 Recent Curriculum for Excellence policy changes

Since completing my interviews in early 2020, and particularly since the Scottish Parliament elections held in May 2021, there have been several notable developments relating to Curriculum for Excellence (CfE) policy. In particular, the Organisation for Economic Co-operation and Development (OECD) carried out a further review of CFE in 2020, which was published in 2021. The review's findings were wide ranging - of particular interest to this study they addressed the coherence of the policy narrative underpinning CfE over time, the role of other policies in potentially modifying CfE's original aims, and the absence of an implementation and evaluation strategy to realise CfE. The OECD (2021) also highlighted that knowledge has an undefined role within CfE and recommended that changes might be needed to the content of CfE to address this - for instance clarifying what kinds of knowledge are required to become a "successful learner" (one of the four capacities). Finally, it also drew attention to the need to ensure that assessment and qualifications undertaken in the Senior Phase reflect the overall aims of CfE.

Following the publication of the OECD's report, the Scottish Government announced a range of policy changes and reviews relating to CfE. Firstly, it committed to a review of the structure of the national organisations responsible for quality improvement, inspection, and qualifications - led by Professor Ken Muir, the former Chief Executive of the General Teaching Council for Scotland (Scottish Government, 2021b). Secondly, the Scottish Government (2021b) committed to reviewing the vision for CfE, including putting in place a process of curriculum review that would consider the role of knowledge

within CfE. Thirdly, the Scottish Government (2021b) stated that it would attempt to better align curriculum, assessment and qualifications activity - including a review of *Building the Curriculum 5* and consideration of changes to National Qualifications. Finally, the Scottish Government (2021b) has committed to exploring ways to increase capacity for meso, micro, and nano curriculum making within the system.

9.3 Summary of main findings

As noted in chapter 1, this thesis has been guided by three research questions.

- What interpretations of 'equity' have been advanced within CfE policy?
- How have interpretations of 'equity' within CfE policy changed over time?
- What are the factors and considerations which explain the place of 'equity' within CfE policy since its inception?

With hindsight, these questions were framed only in relation to explicit mentions of equity. Earlier in the study, my 'working assumption' was that Curriculum for Excellence (CfE) did not have an explicit focus on equity from the start, and that the linking of CfE and equity post-2015 was an example of policy 'retrofitting'. The picture which emerged through my data was considerably more complex. However, the original research questions still provide a useful way of structuring my main findings. It makes sense to answer the first two research questions together, due to the importance of linking the different interpretations of 'equity' within CfE with change over time.

Question 1: What interpretations of 'equity' have been advanced within CfE policy?

Question 2: How have interpretations of 'equity' within CfE policy changed over time?

The study's main findings in relation to these research questions were as follows.

- Since its outset in 2004, this study's data suggest that three different cultural forms linked to the concept of equity have been apparent within CfE policy. These were:

- ‘curriculum for all’ (ensuring CfE is an inclusive curriculum and that all children and young people can access the curriculum) - most closely aligned to what I have termed the policy concept of ‘Equity 1’;

- ‘curriculum differentiation’ (ensuring that CfE allows more tailoring of the curriculum to individual children and young people) - aligned to the policy concept of ‘Equity 2’; and

- ‘curriculum accountability’ (ensuring that the curriculum contributes to reducing measured attainment gaps) - aligned to the policy concept of ‘Equity 5’.

- The second cultural form within CfE policy (‘curriculum differentiation’) aligns most fully with what this study has suggested is the most productive interpretation of equity (‘Equity 2’). This defines equity as an important principle of distributive justice, which emphasises the need for equitable individualisation in response to someone’s distinct circumstances, characteristics, or needs. Equity is therefore focused on processes and on interpersonal relationships, rather than on measured outcomes.

- Claims from several interviewees that ‘equity’ had been an explicit consideration within CfE policy from the outset did not appear credible. However, from the outset, policymakers successfully embedded ‘curriculum differentiation’ as a cultural form within CfE policy. With its focus on tailoring the curriculum to individual or local contexts, ‘curriculum differentiation’ is closely aligned to the principle of equity. Therefore, CfE has arguably **always** provided scope for ‘Equity 2’ through this emphasis on ‘curriculum differentiation’.

- Before 2007, CfE policy did not explicitly refer to ‘equity’ at all. The OECD appears to have been instrumental in introducing the term ‘equity’ into Scottish curriculum policymaking - through its 2007 report on Scottish education. The OECD’s framing of equity in relation to measured attainment (‘Equity 5’) has been influential ever since.

- The third cultural form (‘curriculum accountability’, or ‘Equity 5’) appears to have been the main explicit framing of ‘equity’ within CfE policy. This reflects a

wider trend in which 21st century education policy defines 'equity' in relation to measured performance. A much stronger explicit emphasis on 'Equity 5' was particularly apparent within CfE policy after 2015.

- It is important to note that the increased explicit emphasis on 'equity' within CfE policy from 2015 does not mean that earlier policymakers were unaware of the links between the curriculum and social justice. As noted above, a commitment to inclusivity and curriculum differentiation was apparent within CfE policy from the outset. However, earlier policymakers did not appear to have explicitly considered CfE policy through a 'poverty lens', to explore how these cultural forms could best be realised for children living in poverty, for instance.

Question 3: What are the factors and considerations which explain the place of 'equity' within CfE policy since its inception?

The study's main findings in relation to this research question were as follows.

- The political leadership and direction provided by a new First Minister emerged as the most significant factor mentioned by interviewees in prompting the increased explicit focus on 'equity' within CfE policy after 2014.

- Luke and colleagues' (2012) concept of the technical form of the curriculum allows for a more detailed exploration of how CfE may or may not have supported 'Equity 2', or equitable individualisation (Schaffer & Lamb, 1981). In particular, approaches to curriculum input and output regulation are likely to influence how much 'space' exists to realise such equitable individualisation - although they are not the only factors which will influence this. Other important factors for realising equity through the curriculum include strong support for teachers as curriculum makers. There is also a need for the curriculum to have a well-considered position on teachers' role in selecting and communicating curriculum knowledge, as it is possible that 'Equity 2' could have adverse consequences for children from the most disadvantaged backgrounds.

- Using Archer's (1995) morphogenetic approach allowed me to suggest that, while new cultural forms - such as 'curriculum differentiation' ('Equity 2') - had been

incorporated within CfE policy, there had been limited practice change in realising linked policy goals related to curriculum input and output deregulation.

- Therefore, in Archer's terms there was evidence of cultural morphogenesis - change in ideas foregrounding equity within policy texts - and structural morphostasis - lack of practice change. This lack of practice change could be accounted for by structural continuity in approaches to curriculum output regulation. The ongoing influence of the previous 5-14 curriculum's lack of emphasis on teacher curriculum making also appeared to have acted as a structural barrier to curriculum differentiation.

- One of the main themes from the study was the ongoing persistence of cultures of performativity in Scottish education. There was particular evidence in relation to the post 2015 period that there had been a much stronger emphasis on data and assessed performance. However, there was also evidence that an emphasis on testing and examinations is a longstanding cultural form, and set of practices, within Scottish education.

- Therefore, although CfE's emphasis on 'curriculum differentiation' provides conceptual space for equity, this project's data cast doubt on the extent to which it exists in practice while important structural barriers - in particular to teacher curriculum making and those linked to performativity - remain unaddressed. Addressing these structural barriers is likely to be one of the main routes through which the principle of equity could be most fully realised through CfE.

9.4 Limitations of the research

Like any research study, the work reported in this thesis has limitations, which it is important to acknowledge. The two main limitations are as follows.

The extent to which the interviews explored the real topics of interest

My own conceptual understanding of the topic of this study has developed significantly. Since this study was exploring a new area of research, it took time for me to make the conceptual links between the principle of equity, the technical form of the curriculum, curriculum knowledge, and curriculum regulation. These links did not become more

apparent to me until I was undertaking the data analysis and write up. Therefore, I now feel that my mapping of the main concepts of interest to this study, undertaken in line with Tomlinson's (1989) 'hierarchical focusing', had several gaps. This resulted in the interviews focusing on 'equity' as an explicit concept within CfE policy, with no specific prompts focusing on curriculum regulation. Although the interviews did generate useful data on curriculum regulation, due to this potential gap in data collection, future research may generate further insights into the links between curriculum regulation and 'equity' and may modify the conclusions I have been able to reach.

Time available for further Corpus Linguistics-informed analysis, and inclusion of more recent policy texts within this analysis

I originally intended to undertake further analysis of the CfE policy texts if this felt warranted following my analysis of the interview data or the more theoretically driven analysis. I acknowledge that it would have been helpful to explore further terms using the Corpus Linguistics software. Further exploration of terms such as 'attainment', or terms linked to curriculum input/output regulation, would have been a useful complement to these later stages of analysis. In addition, it would have been useful to include more recent CfE policy texts (those published after 2016) within this analysis. These texts would include the *Refreshed Narrative* for CfE. It is possible that analysing more recent policy texts may have allowed me to identify further changes that are relevant to 'equity'. Due to the need to complete the thesis - and the time required for text mark-up as part of Corpus Linguistics - I did not undertake this analysis; however, I go on to suggest below that it would make up a useful future research project, building on this study.

9.5 Implications for and contribution to research knowledge

My study makes several important contributions to social sciences, educational, and curriculum research knowledge.

The meaning of 'equity' within educational research

My study highlights the lack of conceptual clarity with which the term 'equity' is used within much educational research. My account of the emergence of the principle of equity within the social sciences suggests that it would be helpful for educational researchers to define more clearly how they are using the term 'equity', to avoid the uncritical adoption

of definitions from policy texts. My suggestion that the most helpful framing of 'equity' is one which emphasises equitable individualisation may help in providing the basis for greater clarity and criticality in the use of the term within educational research.

Conceptual links between equity and curriculum policy research

My study has made important conceptual links between the principle of equity, Luke and colleagues' (2012) underutilised concept of the technical form of the curriculum, Nieveen and Kuiper's (2012) work on curriculum regulation, and social realist work on knowledge. Making these conceptual links has allowed me to differentiate between CfE's explicit consideration of equity, and what its technical form may mean for the extent to which it is likely to support equitable individualisation in practice. This is likely to prove helpful for other curriculum researchers. For instance, there is scope to use the concept of equity, a curriculum's technical form, and its approach to curriculum regulation, to undertake comparative work across different education systems.

Use of Archer's morphogenetic approach

My study has added to the scarce literature on how Archer's morphogenetic approach has been applied in practice to the analysis of qualitative and quantitative data. It builds on the work of Priestley and Miller (2012) by demonstrating that Archer's work can be usefully applied to the analysis of policies as cultural forms or sets of practices. My study also contributes to the equally sparse wider literature on how Critical Realism has been used to underpin methodological choices - for instance those related to research design, or the development of an overall analytical strategy.

Contribution to knowledge on Curriculum for Excellence

My study also adds to the body of research knowledge on CfE which, as Humes and Priestley (2021) note, is not large - even though the policy is now 17 years old. My ability to access many policymakers who were involved with CfE is likely to have been enhanced by my own professional involvement in Scottish education. Since undertaking my interviews, several of my interviewees have retired - making it harder for future researchers to access their accounts. Therefore, as well as addressing my specific research questions, my study provides helpful knowledge about the genesis of CfE, the important

factors and considerations which informed its development, and how its policy priorities changed over time.

Use of Corpus Linguistics as a policy analysis tool

The use of Corpus Linguistics within this study represents an original approach which (to the best of my knowledge) has not been used within curriculum studies. This study therefore demonstrates the value in using Corpus Linguistics software to analyse curriculum policy texts. My analysis of CfE policy texts provided a helpful complement to the findings from the interview data, allowing me to be more confident in interpreting my overall data set. My creation of a 'mini corpus' of marked-up texts provides a helpful resource for future curriculum policy researchers who wish to use Corpus-based approaches to study CfE. There is potential for new CfE policy texts to be added to the corpus and for it to be used to undertake comparative work across different education systems. There would also be value in using Corpus Linguistics-informed approaches to explore and compare different kinds of curriculum texts - such as the more detailed specifications of curriculum content which this study did not focus on.

Implications for future research

Based on my study, I feel there would be high value in building on it to undertake the following future research.

- There would be value in undertaking future research which explored the technical form of CfE in more detail, as well as undertaking a more direct comparison between CfE and the previous 5-14 curriculum. For instance, such research could explore the approach to input regulation (content to be covered) within a defined area of both curricula. Corpus Linguistics may again prove a helpful methodological tool in making these comparisons.

- My study has focused on policymakers. There would be value in exploring whether its suggestions about the availability of 'space' for equitable individualisation are borne out in other sites of curriculum making (e.g. schools and classrooms).

9.6 Implications for curriculum policymaking

My study also has several implications for curriculum policymaking in Scotland. In making these recommendations I am now much more aware of what 'life is like' as a policymaker - having moved to work for the Scottish Government myself in 2020. I am aware of the speed with which decisions need to be taken and some of the challenges involved in taking a strategic overview of policy. Drawing on this awareness, I hope that the set of recommendations below are both realistic and helpful. I also hope that, because of my professional role, I can make a personal contribution to achieving at least some of these recommendations.

This study has illustrated the competing interpretations of 'equity' within education policy.

It would be valuable for curriculum policymakers to develop a deeper understanding of these different interpretations of 'equity', and to spend time considering how they are reflected within Curriculum for Excellence (CfE) policy.

The study has suggested that the most conceptually coherent framing of equity is one which emphasises equitable individualisation. This framing of equity aligns with CfE's original intention to allow for increased curriculum differentiation. However, I have also highlighted that the explicit framing of 'equity' within CfE policy is currently much more strongly linked to measured attainment. Cultures of performativity emerged as an important structural barrier to realising equitable individualisation.

Policymakers could usefully reflect on the extent to which equity defined as equitable individualisation is an important policy goal for CfE.

If it remains important, they could also consider how the overall shape of CfE - including its approaches to input and output regulation, and the extent to which they facilitate cultures of performativity - are likely to influence the extent to which equity can be realised.

They could also consider what national curriculum policy can do to facilitate equitable individualisation at other sites of curriculum making. Although

national policy cannot define such equitable individualisation in detail, it is likely that it could provide research-based advice, resources, and support to facilitate it. In addition, support for teacher curriculum making, and a well-considered and understood position on teachers' role in selecting and communicating knowledge within CfE - are likely to be important considerations in realising equity through CfE (including situations when equity may not be the most important curriculum making principle).

This study has shown how policies such as CfE inevitably change over time. This means that, if earlier policy texts are not refreshed, there can be a loss of coherence across time as new ideas supplement older ones. It was also sometimes challenging to identify exactly what texts constituted CfE 'policy'.

Policymakers could also consider whether there would be value in building on the 'Refreshed Narrative' by creating a clearly defined 'core' set of CfE policy texts, and whether these should be updated over time - in line with CfE's original principles. This would allow change, and its implications, to be clearly signalled and communicated.

As noted at the beginning of this chapter, it appears that Scotland is embarking on a process of far-reaching change which, if realised, may see CfE policy into its second decade. Such policy change appears likely to reflect many of the themes of this study - including curriculum regulation, the legacy of previous curriculum change, knowledge, and the role of teachers as curriculum makers. During future curriculum policy change, it will be important that individual policy actions are well conceptualised, understood, planned, and co-ordinated.

In embarking on a process of further curriculum policy change, policymakers could usefully deepen their engagement with curriculum research and concepts which, as shown in this study, can be extremely helpful resources in equipping them with the knowledge and insights to maintain the strategic coherence of CfE.

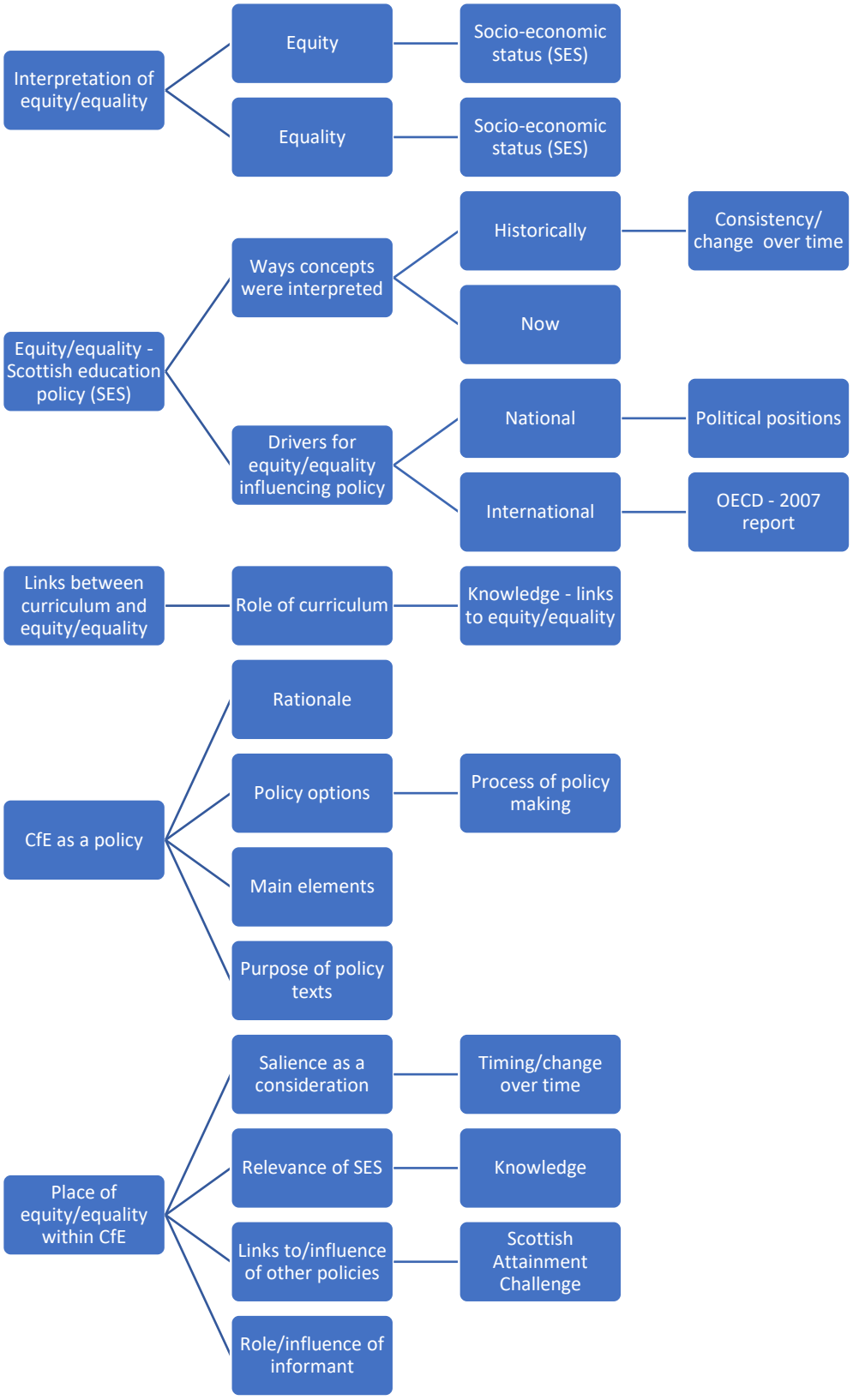
9.7 Concluding statement

I began this thesis by suggesting that equity was a 'tricky concept'. I have gone on to argue that equity does have a clear and helpful meaning as an important principle of distributive justice. However, this helpful interpretation of equity has often been obscured by a lack of conceptual clarity about its meaning - which is apparent both within national and international education policy and, more strikingly, in the education literature. I have shown that policy on Scotland's Curriculum for Excellence (CfE) is conceptually aligned to the principle of equity, through its emphasis on the importance of curriculum differentiation.

However, I have also shown that it is important to consider the extent to which CfE policy is likely to support other sites of curriculum making to realise the principle of equity. It is necessary to consider the curriculum's technical form - particularly how it approaches input and output regulation. From this perspective, I have suggested that there may be a tension between CfE's emphasis on curriculum differentiation and wider cultures of performativity within Scottish education. Therefore, the recent framing of 'equity' in relation to measured attainment gaps within CfE, although common within contemporary education policy, may generate unhelpful tensions in curriculum making. This study has also signalled that curriculum differentiation is likely to require significant attention to teacher and school-based curriculum making, including through professional learning.

Of course, equity, although important, is only one principle which may inform curriculum making. It may not always be an appropriate one. By making the links between equity and curriculum policy more visible, this thesis challenges educational researchers and policymakers to consider the place of 'equity' within a complex, inter-connected policy environment. In doing this, it has provided a helpful starting point in considering whether CfE really is 'a curriculum for equity' and illustrating possibilities for further realising equity within CfE.

Appendix A - Mapping of research topic undertaken as part of preparing for the semi-structured interviews with policymakers



Appendix B - Full interview schedule

P = Prompted, S = Spontaneous

	P	S
(1) As you see them, what do the concepts equity and equality mean in general?		
Meaning in relation to SES?		
(2) In your view, how and why have the concepts equity and or equality influenced education policy in Scotland?		
Historically		
Drivers		
National		
International		
Now		
Drivers		
National		
International (OECD)		
Change in how concepts have been interpreted?		
(3) In your view, what is the role of the curriculum (if any) in ensuring greater equity and/or equality for children and young people?		
Role in ensuring more equal access to conceptual, disciplinary knowledge?		
(4) Thinking about the development of CfE policy in particular, how important have considerations of equity and/or equality been?		
Main policy issues - CfE		
Importance of equity/equality & SES		
Shifts over time		
Main policy options - CfE		
Policy making process		
Importance of equity/equality & SES		
Main policy elements - CfE		
Links to equity/equality		
Your role		
(5) How, if at all, have the links between CfE and equity and/or equality been communicated to different stakeholders?		
Methods - briefings etc.		
Effectiveness of communications		
(6) How, in your view, does CfE link with other elements of Scottish education policy from the perspective of equity and/or equality?		
Role of other policies - equity/equality		
SAC/ASF		
NIF		
GIRFEC		
How well does CfE articulate?		
(7) Is there anything else you'd like to mention in relation to equity, equality and/or CfE policy?		

Appendix C - Full participant information Sheet

Research Project Title: A Curriculum for Equity? An analysis of equity within Scotland's Curriculum for Excellence

Background, aims of project

My name is Stephen Edgar and I am a postgraduate research student at the University of Stirling, based within the Faculty of Social Sciences. My research project is being supervised by Professor Mark Priestley and Doctor Constantinos Xenofontos, who are both based within the same Faculty.

My research project focuses on Scotland's Curriculum for Excellence (CfE), and in particular how ideas about equality and/or equity have been used within CfE since its inception over a decade ago. I am interested in exploring how ideas about equity have been described and how they have changed - with a focus on the national policy framework for CfE. My research project will involve a detailed analysis of CfE policy documents (for instance the "Building the Curriculum" series) and also a number of interviews (please see below for more details).

Why have I been invited to take part?

A major element of the research project is to explore the views of individuals who have been involved in the development of Curriculum for Excellence (CfE). This will allow me to explore whether ideas about equity and/or equality have informed different stages of the curriculum development process in Scotland, and how policy may have changed over time. You have been identified as someone who is likely to be well-informed about CfE due to your professional involvement or experience in its development.

Do I have to take part?

No. You do not have to take part if you do not want to.

If you do decide to take part, you can withdraw your participation at any time without needing to explain and without penalty by advising me of this decision by phone or email (my contact details are at the end of this information sheet). If you do decide that you no longer wish to take part in the research, I will ask you if the information you have

provided up to that point can still be used. If you do not wish me to do this, I will permanently destroy any information you have provided up until that point. Please note that if I have already used the information you have provided, e.g. by analysing your data and publishing it in my doctoral thesis, it may not be possible for me to remove it completely at this stage.

What will happen if I take part?

I will ask you to take part in one face-to-face interview with me. During the interview I will ask a series of questions relating to my research project. These questions will be informed by my own reading of the literature and the detailed analysis of curriculum policy documents mentioned above. There will also be an opportunity for you to add any of your own thoughts which relate to the interview questions. You do not have to answer any question if you do not wish to do so, and you can stop the interview at any point without giving reasons.

I anticipate that the interview will last for around 1 to 1.5 hours. It will take place at a time that is convenient for you. The interview will be held in a location that is convenient for you. It will not be possible for me to hold the interview in your own home.

Are there any potential risks in taking part?

The main risk involved in taking part in the research study is that you may be personally identified. This could have a negative professional effect on you, depending on your role. To help prevent this risk I will undertake a number of steps.

You may decide that you are happy to be publicly identified as a participant in the project, in which case I will develop with you an agreed transcript of your interview, which you are happy to be publicly attributed to you.

If you wish to remain anonymous, I will also work with you to produce an agreed version of your interview transcript. However, I will anonymise this transcript by removing any obvious identifiers or details which could identify you, e.g. the role that you held at a particular time.

All personal data (e.g. your name and contact details) will be stored securely and separately from the transcript of your interview - unless you have agreed to develop an attributable interview transcript with me.

I will ensure that you are not identified when information about your interview is being shared - in writing or in discussions with my supervisors at the University of Stirling - unless you have agreed to develop an attributable interview transcript with me.

Are there any benefits in taking part?

I cannot promise that taking part in this study will benefit you personally, but I hope that this research will influence how policy-makers consider issues of equity in relation to curriculum policy. I am committed to sharing the findings of my research study with policy-makers.

Legal basis for processing personal data

As part of the project I will be recording personal data relating to you. These personal data are your name and contact details and they are required to organise the research interviews. These will be processed in accordance with the General Data Protection Regulation (GDPR). Under GDPR the legal basis for processing your personal data will be public interest/the official authority of the University. As discussed above, you also have the right to withdraw your participation and/or data from this project.

What happens to the data I provide?

If you wish to remain anonymous, the research data will be kept anonymous by removing any identifiers (e.g. name or details of your professional role/affiliation). Any such details will be replaced by pseudonyms and/or numbers. Anonymised data will be stored electronically on my secure University of Stirling network drive. I may retain the anonymised transcripts of your interview to support future publishing which may take place after the end of my doctorate. It will not be possible to identify you from these transcripts unless you have given your consent to develop an attributable interview transcript with me.

Personal information will be recorded in paper format and stored securely in a locked filing cabinet. Your personal data will be kept until the end of my doctoral research project (estimated 2021) and then will be securely destroyed.

Recorded media

I would like to audio-record the interview. I will ask for your consent to do this. If you prefer not to be recorded, I will respect this and will ask to take notes instead. Where the interview has been recorded, I will transcribe the interview. If you wish to remain anonymous, the transcript will then be anonymised - which will involve replacing any identifying information with pseudonyms and/or numbers. The audio recording will be deleted upon completion of the study. I will agree the transcript with you and you will have the opportunity to remove or change any information you are not happy with. Extracts from the agreed transcript may be used in publications (e.g. journal articles). I will not collect sensitive personal information about you and will take all reasonable steps to ensure that you cannot be identified from the transcript, unless you have agreed to develop an attributable transcript with me. All the information I collect will be treated as confidential.

Will the research be published?

The research will be published in my final doctoral thesis. Findings from the research will also be communicated through conference presentations, journal articles and research briefings. You will not be identifiable in any report/publication unless you have previously agreed to develop an attributable interview transcript in partnership with me. The University of Stirling is committed to making the outputs of research publicly accessible and supports this commitment through our online open access repository STORRE. Unless funder/publisher requirements prevent us, this research will be publicly disseminated through our open access repository. If you are interested in seeing it, I will provide an electronic copy of the final thesis to you on completion. If you are interested I can also provide you with copies of other reports/publications based on the research.

Who is organising and funding the research?

I am an employee of Education Scotland, which has funded the fees for my doctoral research study as part of my ongoing professional development as a researcher. Education

Scotland will have no access to the data collected as part of the research study or your personal data and will not be able to influence my interpretation of the evidence collected or analysed as part of this study.

Who has reviewed this research project?

This project has been ethically approved via The University of Stirling General University Ethics Panel.

Your rights

You have the right to request to see a copy of the information I hold about you and to request corrections or deletions of the information that is no longer required.

You have the right to withdraw from this project at any time without giving reasons and without consequences to you. You also have the right to object to me processing relevant personal data however, please note that once the data are being analysed and/or results published it may not be possible to remove your data from the study. If you wish to withdraw from the study or for me to stop processing your personal data, please contact me by phone or email, using the details at the bottom of the information sheet.

Who do I contact if I have concerns about this study or I wish to complain?

If you would like to discuss the research with someone, including if you have any concerns about the way it is being carried out then please contact the Dean of the Faculty of Social Sciences. The Dean is Professor Alison Bowes and she can be contacted at a.m.bowes@stir.ac.uk.

You have the right to lodge a complaint against the University regarding data protection issues with the Information Commissioner's Office (https://ico.org.uk/concerns/).

The University's Data Protection Officer is Joanna Morrow, Deputy Secretary. If you have any questions relating to data protection these can be addressed to data.protection@stir.ac.uk in the first instance.

What will happen next?

If you have any further questions about the research, please contact me using the details below. If you would like to take part in the study, please complete and sign the consent form. The consent form confirms that you have understood what the study is about and that you are happy to participate in the activities described in this Information sheet. You will be given a copy of this information sheet to keep. I will then work with you to arrange a suitable time for an interview. If you do not wish to participate in the research, then you do not need to do anything further.

Appendix D - Participant consent form

Participant number *[Insert]*

Research Project Title: A Curriculum for Equity? An analysis of equity within Scotland's Curriculum for Excellence

	Please initial statements 1-9 below.
1. I confirm that I have read and understood the information sheet explaining the above research project.	
2. I confirm that I have had the opportunity to ask questions about the project.	
3. I understand that my participation is voluntary and that I am free to withdraw at any time without giving any reason. I am aware that if I withdraw my participation once my information has been analysed/used as part of research outputs then it might not be possible to fully withdraw this information.	
4. I agree to take part in interviews, as described on the information sheet, for the purposes of this research.	
5. I consent to being audio recorded during the interview.	
6. I understand how audio will be used in research outputs i.e. to produce a written transcript of my interview.	
7. I agree to work with the researcher to agree a final version of the written transcript of my interview.	
8. I agree that the written transcript of my interview can be used for future research studies.	
9. I agree to take part in this study.	
	Please initial EITHER statement 10 OR statement 11 below.
10. I agree that my interview transcript will be publicly attributable to me in any reporting based on this research.	
11. I agree that my interview transcript will be anonymised and I give permission for the researcher to have access to my anonymised responses. I am aware that I will not be named in any research outputs, but that I could be identified by people I know through the stories I tell, although everything will be done to minimise this possibility.	

Name of Participant **Signature:**

Date: Click here to enter a date

Name of Researcher **Signature:**

Date: Click here to enter a date

Appendix E - Confirmation of ethical approval

UNIVERSITY of STIRLING

General University Ethics Panel (GUEP)
University of Stirling
Stirling
FK9 4LA
Scotland UK

E: GUEP@stir.ac.uk

Stephen Edgar
Social Sciences
University of Stirling
FK9 4LA

s.t.edgar@stir.ac.uk

24th September 2018

Dear Stephen

Re: Ethics Application: A curriculum for equality? An analysis of equality within Scotland's Curriculum for Excellence (GUEP458)

Thank you for your submission of the above to the General University Ethics Panel.

I am pleased to confirm that GUEP has approved your application, and you can now proceed with your research.

Please ensure that your research complies with Stirling University policy on storage of research data http://www.stir.ac.uk/is/researchers/data/afteryourresearch/

Please note that should any of your proposal change, a further submission (amendment) to GUEP will be necessary.

Please be aware that research approved by GUEP may be audited to ensure the research has proceeded in the manner approved. The selection of projects to audit will be done at random.

If you have any further queries, please do not hesitate to contact the Committee by email to guep@stir.ac.uk.

Yours sincerely,
Pp

On behalf of GUEP
Dr William Munro
Deputy Chair of GUEP

Appendix F - Complete list of Curriculum for Excellence policy texts included in the Corpus Linguistics-informed analysis

Text category	Policy Text	Publisher	Publication date	Word count
Foundational texts	A Curriculum for Excellence: The Curriculum Review Group	Scottish Executive	2004 (November)	4,119
	A Curriculum for Excellence: Ministerial response	Scottish Executive	2004 (November)	2,759
	A Curriculum for Excellence: Progress and proposals	Scottish Executive	2006 (March)	8,440
Building the Curriculum series	A Curriculum for Excellence: Building the curriculum 1: The contribution of curriculum areas	Scottish Executive	2006	12,175
	A Curriculum for Excellence: Building the curriculum 2: Active learning in the early years	Scottish Executive	2007	6,182
	Curriculum for Excellence: Building the curriculum 3: A framework for learning and teaching	Scottish Government	2008 (June)	18,013
	Curriculum for Excellence: Building the curriculum 4: Skills for learning, skills for life and skills for work	Scottish Government	2009 (October)	18,208
	Curriculum for Excellence: Building the Curriculum 5: A framework for assessment[2]	Scottish Government	2011 (February)	20,663
	Curriculum for Excellence: Building the curriculum 5: A framework for assessment - quality assurance and moderation	Scottish Government	2010 (January)	4,339
	Curriculum for Excellence: Building the curriculum 5: A framework for assessment - understanding, applying and sharing standards in assessment for Curriculum for Excellence: Quality assurance and moderation	Scottish Government	2010 (October)	5,479
	Curriculum for Excellence: Building the curriculum 5: A framework for assessment - recognising achievement, profiling and reporting	Scottish Government	2010 (December)	7,242
CfE Briefings series	CfE briefing 1: Broad general education in the secondary school	Education Scotland	2012 (April)	2,292
	CfE briefing 2: Curriculum for Excellence: Assessing progress and achievement in the 3-15 broad general education	Education Scotland	2012 (August)	2,524
	CfE briefing 3: Curriculum for Excellence: Profiling and the S3 profile	Education Scotland	2012 (September)	2,017
	CfE briefing 4: Interdisciplinary Learning	Education Scotland	2012 (September)	2,286
	CfE briefing 5: Personalised Learning	Education Scotland	2012 (November)	2,244
	CfE briefing 6: A guide for practitioners: Progression from the Broad General Education to the Senior Phase: Part 1: The S3 experience	Education Scotland	2012 (December)	2,723

	CfE briefing 7: Progression from the Broad General Education to the Senior Phase: Part 2: Learning in the Senior Phase	Education Scotland	2012 (December)	2,295
	CfE briefing 8: Progression from the Broad General Education to the Senior Phase: Part 3. Curriculum planning at the Senior Phase	Education Scotland	2013 (February)	2,415
	CfE briefing 9: Learning about Scotland	Education Scotland	2013 (March)	2,181
	CfE briefing 10: The role of Community Learning and Development (CLD) and partnership working	Education Scotland	2013 (April)	2,184
	CfE briefing 11: Planning for learning part 1: Through the Broad General Education	Education Scotland	2013 (May)	2,453
	CfE briefing 12: Planning for learning part 2: Further learning, training and employment beyond age 16	Education Scotland	2013 (June)	2,478
	CfE briefing 13: Planning for learning part 3: Individualised educational programmes (IEPs)	Education Scotland	2013 (June)	2,057
	CfE briefing 14: Curriculum for Excellence: Political Literacy	Education Scotland	2013 (August)	2,616
	CfE briefing 15: Sciences for all	Education Scotland	2013 (October)	2,331
	CfE briefing 16: Curriculum for Excellence: Religious observance (time for reflection)	Education Scotland	2014 (November)	3,074
	CfE briefing 17: Curriculum for Excellence: Scots Language	Education Scotland	2015 (November)	2,623
Re-prioritisation texts	Delivering excellence and equity in Scottish education: A delivery plan for Scotland	Scottish Government	2016 (June)	2,910
	A statement for practitioners from HM Chief Inspector of Education	Education Scotland	2016 (August)	2,243
			Total word count	**153,565**

Appendix G - Tags used during policy text mark-up process

Tag	Textual feature the tag identified
<back>, </back>	Material at the end of the text not included in the text e.g. appendices.
<body>, </body>	The body of the text, excluding any front or back matter.
<div type>, </div type>	Subdivisions of the text e.g. sections and sub-sections. Type has also been classified within the text e.g. div type SECTION
<front>, </front>	Material at the beginning of the text not included in the text e.g. bibliographic information.
<gap>, </gap>	Notes the omission of material that is not required for analysis e.g. figures, tables.
<head>, </head>	Heading text e.g. the title of a section.
<hi>, </hi>	Typographically distinct words or phrases e.g. bold or italicised text. Type of highlighting has also been classified within the text using an appropriate rendition code e.g. BO for bold text.
<item>, </item>	An item within a list.
<list>, </list>	A collection of distinct items flagged as such by special layout in the text e.g. a bulleted or numbered list.
<note>, </note>	Footnote.
,	Paragraph.
<text>, </text>	An individual text.
<toc>, </toc>	Table of contents.

Appendix H - Categories and codes identified within interview data

Categories	Codes
Assessment & data	Assessment & qualifications
	Attainment & Achievement
	Equity Data
	Performance Data
Conceptualising Equality	Equal opportunities
	Equal provision
	Equal respect
	Equality legislation
	Equality of access
	Equality of outcome
Conceptualising Equity	Equity - differentiation
	Equity - emergence
	Equity - equal treatment
	Equity - fairness
	Equity - intersecting factors
	Equity - lack of clarity
	Equity - opportunities
Curriculum	5-14
	BTC Series
	CfE - Aims not realised
	CfE and equity
	CfE Engagement
	CfE Guidance
	Competencies
	CRG - Handover
	CRG - Process
	CRG & equity
	Curriculum differentiation
	Curriculum knowledge
	Curriculum Review Programme Board
	Experiences and outcomes
	Holistic curriculum reform
	Learning and teaching
	National Debate - Drivers
	National Debate - Equity
	National Debate - Scope
	Refreshed Narrative
	S1 & S2
	Skills
	Teachers as curriculum developers
	Vocational Education
Making policy	Civil Service
	Devolved responsibilities
	Distinctiveness
	Education policy community
	Education Scotland
	Equity - policy definitions
	First Minister
	HMIE

Categories	Codes
	Idealism
	LTS
	Political Support
	SQA
Policy internationalisation	Global change
	OECD
	OECD Review 2007
	OECD Review 2015
	Policy borrowing
	SICI
	UNESCO
Social justice policy	Additional Support Needs
	Behaviour
	Citizenship & Rights
	Comprehensive schooling
	Early Learning
	Equity policy alignment
	Equity policy continuity
	GIRFEC
	Inequalities
	NIF
	SAC
	School staffing
	SIPP
Teachers	Equity - professional understanding
	Teaching Profession
	Teaching Scotland's Future

Appendix I - Extract from an analytic memo

Memo on the code ‘OECD review 2007’

Interviewee 6 mentioned that they were not sure where the focus on equity within the 2007 review came from - Scotland or the OECD. They thought it might have been identified already in HMIE analysis. They then went on to say the review was a ‘check in’ about whether Scotland had identified the right issues following from CfE and the OECD […]. Note to self: Check against the review. Interviewee 8 said the report was commissioned in anticipation the OCD would provide insights into how Scotland could move forward with its own intentions - and the focus on equity was what was expected of OECD. Interviewee 4 said that the OECD was asked to look at the issue of equity and that this theme 'flowed on from the curriculum for excellence' (not sure about this?). They felt the external view was beneficial as it increased the objectivity of the work and also helped 'bind' the whole education community together in an understanding of issues and follow through (but don't think that really happened).

Interviewee 5 was quite interesting in reflecting on there being two different camps in the review team - one focused on data/Scotland needing more standardised measures, and the other recognising wider issues and supporting AifL.

Interviewee 15 spoke about the OECD pulling on a range of Scottish data to inform its review (there was subsequently less due to CfE). Interviewee 2 mentioned one of the key findings of the review - performance determined by where you live. Interviewee 12 felt that they had taken a complacent message from the review that solutions to equity largely lie outside the school however recognised this could become an excuse. They did not remember it coming up in the programme board for CfE. Interviewee 6 interpreted the findings in relation to schools looking too much the same as well as not being 'strong enough' to move people out of poverty (not sure that's really what the issue was?). […]

Appendix J - Sample analytic table used for theoretical analysis

	Structure: Policy goal 1 - curriculum input deregulation	Time		**Culture: Cultural form A - curriculum differentiation**	Time
Structural/ cultural influences	**Existing structural context:** From 1991 to 2004 the 5-14 curriculum de-emphasised role of teachers as curriculum makers. Curriculum policymakers attempt to realise curriculum input deregulation through CfE policy from 2004 onwards. To do this, they require teachers to engage in curriculum making activity. Curriculum policymakers need other organisational structures (local authorities, schools, unions) and members of 'norm circles' (teachers) to effect change - therefore **necessary** relationships between structural institutions. However, there are **incompatibilities** at structural level between this policy goal and the capacity to realise it, due to the structural consequences of the 5-14 curriculum on curriculum design capacity at teacher, school, local authority etc. level.	T1 (2004)		**Existing cultural context**: From 1991 to 2004 the 5-14 curriculum emphasised tighter central specification, with less focus on meeting individual needs. Curriculum policymakers attempt to embed a new cultural form - curriculum differentiation - within CfE policy. This emphasised greater personalisation of the curriculum to meet individual needs and make the curriculum more responsive to local contexts. These two cultural forms are logically inconsistent therefore **contradictory**. However, this contradiction is not constraining as the two cultural forms are **contingently** related - the new set of ideas is not dependent on the old, so the old can be jettisoned and replaced by the new.	T1 (2004)
Situational logics	**Correction:** Curriculum policymakers seek to address and amend the structural incompatibility (the legacy of 5-14).		←→ Socio cultural interaction	**Elimination:** Old cultural form (curriculum content should be more centrally determined by government) to be displaced by new one (curriculum content should be more differentiated and locally determined). Old cultural form needs to be discredited and new one needs to be promoted in face of concerns e.g. about place of curriculum knowledge.	
S.S/C.S Level	**Compromise:** Curriculum policymakers attempt to effect change in teacher curriculum development within overall situational logic of compromise (due to necessary relationship) - emphasising adaptive steps over time.			**Pluralism:** Social groups tend to assert either old or new cultural form.	
S-I/S-C Level *	**Containment:** Curriculum policymakers attempt to address structural incompatibilities that may threaten the achievement of policy aims around teacher curriculum development.			**Cleavage:** Social groups align themselves with either old or new cultural form.	
Tendency towards…	**MORPHOSTASIS**			**MORPHOGENESIS**	
Agency	Initially policymakers attempted to deal with the contradiction at a socio-cultural level through CfE engagement and communications (relying on headteachers to communicate knowledge back). When this was unsuccessful further policy change was initiated through *Teaching Scotland's Future* to review and enhance the role of the teacher as curriculum maker (alongside wider changes). Reform of	T2-T3 (2004-2020)		New cultural form (curriculum differentiation) promoted by policymakers post-2004 as part of CfE development. Evidence for both pluralism and cleavage. Some stakeholders (e.g., learned societies) concerned about place of knowledge. The profession concerned that the new curriculum is 'woolly'. Socio-cultural persuasion work to reassure concerned stakeholders and present curriculum differentiation as unproblematic through communications and engagement.	T2-T3 (2004-2015)

	Structure: Policy goal 1 - curriculum input deregulation	Time		**Culture: Cultural form A - curriculum differentiation**	Time
	National Qualifications - attempt to influence teaching practice in lower secondary to make it more in line with CfE.				
Social elaboration	Curriculum input deregulation realised at cultural level (within policy texts); however evidence of a lack of change in practice. Morphogenesis at cultural level (new ideas displaced old) but morphostasis at structural level - lack of practice change in teacher curriculum development. This lack of practice change led to further cultural morphogenic cycles as additional new policy ideas introduced to respond to continued morphostasis at S-I level e.g. in teaching standards, teacher training.	T4 (?)		Curriculum differentiation did become embedded within the new curriculum. Technical challenges in realising it, unaddressed at a cultural level so some evidence of subsequent cultural morphostasis (policy drift). This cultural form likely to have conflicted with cultural form C (curriculum accountability) especially post-2014/15 when this emerged more strongly within CfE policy. The relationship between cultural forms A and C then likely led to a further cultural morphogenetic cycle (however curriculum differentiation was not modified within CfE but through other policy changes e.g. standardised assessments).	T4 (2015)
Data	**Interviews:** Main attempts to realise curriculum input deregulation initially socio-cultural e.g. CfE guidance, engagement etc. Evidence about the need for Teaching Scotland's Future to help realise the 'ends' of CfE. Evidence about reform of National Qualifications as a tool to achieve curriculum change. Reflections from 2019-20 about the fact that more could have been done to make the shift from 5-14 to CfE smoother, with a greater focus on curriculum making skills.			**Interviews:** Some evidence of cultural conflict - resistance to attempts to question the place of disciplinary content knowledge within CfE. Evidence of work to reassure stakeholders. Evidence that cultural morphogenesis did occur - curriculum differentiation did become embedded within CfE e.g., experiences and outcomes did reflect this. Remained a policy goal in 2019-20. Evidence of concerns from the profession about understanding CfE and the profusion of guidance then issued.	

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