The Routledge International Handbook of Equity and Inclusion in Education

Edited by Paul Downes, Guofang Li, Lore Van Praag and Stephen Lamb

THE ROUTLEDGE INTERNATIONAL HANDBOOK OF EQUITY AND INCLUSION IN EDUCATION

Providing a cornerstone to the global debate on equity and inclusion within education, this handbook explores equity issues pertaining to poverty and social class, race, ethnicity, sociocultural, sociolinguistic exclusion in education and recognises intersectionality and gender across these dimensions.

This carefully curated collection of essays written by international experts promotes inclusive systems in education that explicitly recognise the voices of learners who may be at risk of marginalisation, exclusion or underachievement. Developing a multilayered innovative conceptual framework involving spatial, emotional-relational and dialogical 'turns' for education, it emphasises key system points for reform, including building strategic bridges between health and education for vulnerable groups and shifts in focus for initial teacher education and the wider curriculum.

The handbook is organised into the following key parts:

- Theoretical Frameworks
- Funding Models and Structures for Equity and Inclusive Systems
- Exclusion and Discrimination
- Bridging Health and Education
- Agency and Empowerment
- Outreach and Engagement

The Routledge International Handbook of Equity and Inclusion in Education will be of great value to academics operating in the areas of education, psychology, sociology, social policy, ethnography, cultural studies; researchers in university research centres and in policy institutes pertaining to education, poverty, social inclusion as well as international organisations involved with inclusion in education.

Paul Downes is a Professor of Psychology of Education, and the Director of the Educational Disadvantage Centre, Institute of Education, Dublin City University, Ireland.

Guofang Li is a Professor and Tier 1 Canada Research Chair in Transnational/Global Perspectives of Language and Literacy Education of Children and Youth in the Department of Language and Literacy Education and Co-Director of Language Sciences Research Excellence Institute, University of British Columbia, Canada.

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ABOUT THE EDITORS

Paul Downes is a Professor of Psychology of Education, and the Director of the Educational Disadvantage Centre, Institute of Education, Dublin City University, Ireland and an Affiliate Professor at the Centre for Resilience and Socio-Emotional Health, University of Malta. With over 110 peer-reviewed publications in areas of education, psychology, sociology, philosophy, law, anthropology and social policy, he has given keynote lectures and invited presentations in 30 countries and for 16 countries' official ministries. He has been involved in various expert advisory roles for the European Commission, including the Pathways to School Success Working Group, and European Education and Training Expert Panel to support the EU's post-2020 Strategic Cooperation Framework. A Foundation P&V Brussels, Laureat Award Winner, he has been a Visiting Research Fellow at the University of British Columbia, Vancouver, Victoria University, Melbourne and University of Cambridge, Lauterpacht Centre, and member of the Irish Senate and Parliament Expert Group on early school leaving. He is co-author of the Assessment of the Implementation of the 2011 Council Recommendation to Reduce Early School Leaving, published by the EU Commission (2019) and was principal investigator for a 12 country European study on access to education. He led the establishment of the International Research Network on Equity in Youth Education and Training (IRNEYET). His book *Reconstructing Agency in Developmental and Educational Psychology: Inclusive Systems as Concentric Space* (Routledge 2020) was nominated for the American Psychological Association's (APA) William James Book Award.

Guofang Li is a Professor and Tier 1 Canada Research Chair in Transnational/Global Perspectives of Language and Literacy Education of Children and Youth in the Department of Language and Literacy Education, University of British Columbia, Canada. Her program of research focuses on bilingualism and biliteracy development, pre- and in-service teacher education, and current language and educational policy and practice in globalised contexts. She is also Co-Director of UBC Language Sciences Global Research Excellence Institute. As a leading researcher in foreign and second language education internationally, her work and contribution has been recognised by numerous national and international awards including the 2016 Mid-Career Award from the Second Language Research Special Interest

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Lore Van Praag, Master, PhD from Ghent University, is an Assistant Professor at the Erasmus University of Rotterdam, where she works on social inequalities and diversity. Over the years, she has gained a lot of research expertise in participating in interdisciplinary research projects (Belspo Migradapt, H2020 MICADO, H2020 PERCEPTIONS, H2020 COVINFORM, Erasmus+ ACCORD) and coordinating research projects such as the Validiv project (SBO), the RESL.Eu on Early School Leavers in Europe (FP7) and the ReIncluGen project (Horizon Europe). She taught courses, including 'Introduction Sociology', 'Introduction Anthropology', 'Interdisciplinary perspectives on migration and integration', 'Sociology of education'. Between 2019 and 2022, she was the head of the Centre for Migration and Intercultural Studies (CeMIS) at the University of Antwerp. Her past research project focused on interethnic relations in schools, processes of tracking/streaming, discrimination, educational achievement, social support, early school leaving, educational policies, primary and secondary education, grounded theory and ethnography. Currently, her research interests are focused on environmental migration, migrant perspectives on climate adaptation, education, gender empowerment and diversity. She published international and national articles in peer-reviewed journals and books. She is part of the International Research Network on Equity in Youth Education and Training (IRNEYET) and Leiden-Delft-Erasmus Centre Governance of Migration and Diversity (LDE-CGM).

Stephen Lamb is a Professor Emeritus at the Centre for International Research on Education Systems, Victoria University. Holding a Research Chair in Education at Victoria University, Stephen has published in several areas of education including the schooling of socioeconomically marginalised students, school effectiveness, educational inequality, school to work transition and education system policy. He has undertaken a range of high-impact policy research projects for governments and school systems, both nationally and internationally, on school funding, performance of schools and school systems, and quality of school programs. In 2017, Stephen was appointed to the National School Resourcing Board in Australia, a body responsible for providing independent oversight over Commonwealth school funding arrangements and undertaking reviews of different parts of the national school funding model. In 2023, Stephen was appointed by the Australian Government to the National School Reform Agreement Expert Panel (one of six members) to undertake a review to inform the next national school funding agreement. The review, titled to *Inform a Better and Fairer Education System*, was established to advise Australian Education Ministers on what reform priorities should be included in the next five-year school funding agreement.

CONTRIBUTORS

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Research on Diversity in Teacher Education Award. In 2023, in honour of her exceptional contributions to, and excellence in, education research, Souto-Manning became an AERA Fellow.

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Patricia Steinhauer, PhD, is a member of Saddle Lake Cree Nation in Treaty 6 territory, the community where she was raised and educated. Her parents are Genevieve and the late Walter Steinhauer. She has two children, a daughter and a son. Dr Steinhauer is an Associate Professor in the Faculty of Education at the University of Alberta and cross-appointed to the Aboriginal Teacher Education Program (ATEP). She is also a Professor in the Indigenous Peoples Graduate Education Specialisation. Her research interests include First Nations Treaty education and policy, nehiyawewin language contexts and intelligences, Indigenous pedagogy – kiskinohamâkewin, kiskinohamâsiwin, kiskinwahamâtowin, and theory and curricular approaches that honour nehiyaw intelligences of okiskinwahamâkewin. Dr Steinhauer has over 15 years of combined experience as a classroom teacher and school principal. Additionally, she has nine years of service in educational administrative and leadership roles in First Nations and Provincial contexts. Her commitment in education remains rooted in honouring ancient nehiyaw language and ceremonial ethics and contexts.

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Linda Young, PhD, paskwaw nehiyaw/Plains Cree from Onion Lake Cree Nation, Treaty 6 Territory, is the eldest of 11 children, married with two daughters, three sons, 12 grandchildren, and one great-grandchild. Linda is a 'y' dialect nehiyawewin speaker, residential school survivor, Knowledge Keeper, multi-media artist and holds a doctoral from the Department of Curriculum Studies, University of Saskatchewan, Canada.

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EDITORS' INTRODUCTION

Multi-layered equitable inclusive systems: the emergence and expansion of a global framework to eliminate socioeconomic and sociocultural exclusion in education

Paul Downes, Guofang Li, Lore Van Praag and Stephen Lamb

Introduction: global recognition of the broader conceptualisation of inclusion in its interplay with equity

A space has been opened up globally for the interplay between equity and inclusion in education that requires further conceptualisation. While equity, in particular, has a long history and wide variety of meanings, these somewhat overfamiliar concepts of equity and inclusion have arguably been revitalised in recent years. This has occurred through a significant broadening of the UN understanding of inclusion, beyond special educational needs, to socioeconomic and sociocultural dimensions of exclusion. Recognising that equity is a political concept that resists simple definition (UNESCO, 2018), this Handbook interrogates the need for broader understandings of equity as part of its renewal through its interplay with a wider conceptualisation of inclusion globally. While inclusion is sometimes treated as a subdivision of equity, as a means to equity, it is also increasingly being treated as a goal of itself.

This interplay between equity and inclusion has come increasingly onto the agenda of global policymakers, aiming to develop transformative education. Building on international research and a growing political awareness of social injustices in education, the 2015 Incheon declaration at the World Education Forum states that:

> inclusion and equity in and through education is the cornerstone of a transformative education agenda, and we therefore commit to addressing all forms of exclusion and marginalization, disparities and inequalities in access, participation and learning outcomes. No education target should be considered met unless met by all.
>
> *(p. 7)*

The United Nations Sustainable Development Goal 4 aims to ensure inclusive and equitable quality education, and promote lifelong learning opportunities for all by 2030 (UNESCO, GEM, 2020). However, current representation in educational systems around the world 'tends to be dominated by the most outspoken and articulate groups', namely, majority and

wealthier groups with access to cultural capital and power to sustain their dominant position and which in reality reinforces 'a sense of exclusion and disaffection among some of the school community' (UNESCO, 2016, p. 81). This exclusion of minority voices renders marginalised groups and individuals inert and lifeless, as an epistemological violence leading also to ethnocentrism, as abstract categories of the other (Teo, 2008). There is a need to challenge the hard borders of diametric oppositional splits between ingroups and outgroups (Downes, 2020a, p. 21) underpinning 'othering'. This Handbook aims to promote equitable inclusive systems in education that explicitly recognise the voices of those groups of learners who may be at risk of marginalisation, exclusion or underachievement. These groups at risk of being othered in the education system are, for example, those experiencing poverty and low income, low status occupation, impoverished living conditions, being minoritised based on ethnicity, race, migrants, Indigenous populations, non-dominant minority language groups or the intersection of these markers, including with gender, particularly regarding girls and women.

Our Handbook situates itself in this emerging space, against the backdrop of not only the UN SDG 4 on equitable and inclusive education, but also in line with SDG 1 No Poverty, namely, to 'End poverty in all its forms everywhere', as issues of global relevance. A key reference point is the UN GEM report (2020) on inclusion in education globally with its significant expansion of the educational trajectory for inclusion to socioeconomically and socioculturally marginalised groups. The UN GEM report (2020) is explicit on the need to 'widen' the concept of inclusion, while recognising that inclusion is a somewhat slippery, nebulous concept 'whose multifaceted nature makes it difficult to pin down' (p. 11).

A clear contrast can be drawn between the more expansive UN GEM report's understanding and the earlier OECD (Field et al. 2007) definition of inclusion in its focus on *Ten steps to equity in education*, namely, as 'ensuring a basic minimum standard of education for all' (p. 11). The OECD (2007) goes on to state that 'equity in education includes two dimensions, fairness and inclusion. Fairness implies that personal and social circumstances such as gender, socioeconomic status or ethnic origins should not be an obstacle to educational success. Inclusion implies a minimum standard for all' (p. 29). While the OECD (2007) report does offer seeds of a wider conception of inclusion, for example, when referring to 'inclusive practices' pertaining to 'relationships between schools, parents and communities' (p. 18), its overarching vision of inclusion is premised on a focus on basic skills, such as performance in literacy and maths. Elsewhere in this OECD (2007) document, focusing on no more failures as central to its inclusion vision, is a more questionable conception of inclusion largely as assimilation, 'successful inclusion of migrants and minorities within mainstream education' (p. 19). The UN GEM report (2020, p. 184) explicitly distances its conception of inclusion from assimilation.

The proposed expansion of the concept of inclusion in this Handbook from the narrower one of the OECD's (2007, 2010) *Ten steps to equity in education* is not to detract from the key steps they propose. These include limiting early tracking and streaming and postponing academic selection, managing school choice so as to contain the risks to equity, offering second chances to gain from education, as well as provision of systematic help to those who fall behind at school and reducing high rates of school-year repetition. They also emphasise the need to strengthen the links between school and home, and to respond to diversity through provision for the successful inclusion of migrants and minorities within mainstream education. Other issues emphasised by the OECD (2007, 2010) are related to fair and inclusive resourcing, namely, providing strong education for all,

giving priority to early childhood provision and basic schooling and directing resources to students and regions with the greatest needs. Their key steps conclude with the need to set concrete targets for more equity, particularly ones related to low school attainment and early school leaving.

Rather than disagreeing with these vital ten steps, it is being sought to extend the domain of relevance of analysis for research, policy and practice here for equity and inclusion in education. Indeed, our Handbook maintains a strong focus on the issue of literacy in a number of chapters, resonant with the OECD's (2007) inclusion concern regarding a basic minimum standard of education for all. The literacy focus for current purposes is cognisant of the PISA 2018 associations of students with backgrounds of poverty and low literacy scores, as well as higher risk of these students experiencing the exclusionary process of being bullied in school. The PISA 2018 revealed that the proportion of underachievers in reading in most countries is much larger in the bottom quarter of the economic, social and cultural status index (ESCS) compared with pupils in the top quarter of ESCS; this is up to more than 40 percentage points in some EU countries. Low achievers in reading are twice as likely to get bullied as the high-achievers category (PISA, 2018). Moreover, the OECD's (2007) concern with 'fair and inclusive resourcing' (p. 20) is a strong focus, especially in section II of our Handbook, on Funding Models and Structures for Equity and Inclusive Systems.

An emphasis on inclusive systems beyond individual resilience

The UN GEM report (2020) explicitly employs the term 'inclusive systems' as part of a priority recommendation to 'ensure inclusive systems fulfil every learner's potential' (p. 21). This places the onus on the system to support the child or young person. An inclusive systems approach challenges the prevalent conception in many areas of developmental and educational psychology with fostering a resilient heroic child in the face of trauma and adversity; the 'wonderwoman' or 'superman' version of the bullet proof child requires deconstruction to focus on system supports to enable all children to fulfil their needs and dynamic potentialities rather than constructing heroic children (Downes, 2020a). As the UN GEM (2020) report states, 'Achieving inclusion requires a whole-system approach' (p. 57).

In this shift from a discourse on individual resilience to one on systemic inclusion and structural agency, it is to be recognised that Ungar (2012) broadens Rutter's (1985) conception of individual resilience to a socioecological model of resilience:

> In the context of exposure to significant adversity, whether psychological, environmental, or both, resilience is both the capacity of the individual to navigate their way to health-sustaining resources, including opportunities to experience feelings of well-being, and a condition of the individual's family, community and culture to provide these health resources and experiences in culturally meaningful ways.
>
> *(p. 225)*

However, this broader environmental model does not include a focus on State systemic supports, as integrated services, in its role of developing inclusive systems of care. Ungar's (2012) socioecological perspective on resilience needs to go further in its systemic concerns, for example, to include a systemic focus on outreach to marginalised families and a relational space of assumed connection between individuals and system supports (Downes, 2020a).

The issue of socioeconomic and sociocultural exclusion in education systems invites a systemic focus such as Bronfenbrenner's (1979) social-ecological systems theory on different policy and practice aspects at different system levels (macro-exo-meso-micro). Bronfenbrenner's (1979) systemic focus arguably did not give enough attention to power-related issues of system blockage, inertia and fragmentation (Downes, 2014), as well as to issues of selection and discrimination. The seminal UNESCO Faure report on lifelong learning (1972) touched upon the potential relevance of a systems analysis for education systems (pp. 128–161), though in a preliminary fashion. In doing so, it raised concerns with static conceptions of a system and highlighted the need to consider not so much a systemic approach but rather an inverted, diametrically opposite non-system approach for education (p. 161). This deschooling non-systemic approach, influenced by Illich's (1971) famous work on deschooling society, understates the need to recognise that even attempts at a non-systemic approach invariably develop simply a different kind of system of relations requiring analysis. Insights of structuralism and poststructuralism would emphasise that a systemic (or postsystemic) focus applies not only at the level of formal educational structures but also with regard to systems of relation for cultures and subcultures, including systems of language and meaning involved in constructing realities of such cultures. In other words, systems of relations need to be considered at different levels, and to ignore a systemic level focus in search of a non-system is a limited approach. The question is more: how to develop dynamism and overcome inertia within different levels of systems and subsystems as part of system change (Downes, 2014). Denial of systemic levels of analysis does not help to go beyond static, blocked hierarchical systems of relations. There is an urgent need to answer the UN's call for interdisciplinary work that follows 'a systematic framework for identifying and dismantling barriers for vulnerable populations' (UN GEM report (2020, p. 18).

The contributing chapters for this Handbook were encouraged to integrate their work around the following framework of ten key principles for inclusive systems in and around schools, building on Downes, Nairz-Wirth and Rusinaite's (2017) framework:

1 *System wide focus.* Schools, agencies and families are distinct but connected systems, each having a set of relationships and mutual influences that impact the individual – both system blockages as barriers and system supports.
2 *Equality and non-discrimination.* Substantive equality requires a commitment to educational success for everyone irrespective of social background; to achieve this, different groups may need additional resources and supports. Non-discrimination includes a right to equality of concern and respect in a supportive environment free of prejudice.
3 *Children's rights to expression of voices and participation, and other educational rights.* Children have a right to be heard on issues directly affecting their own welfare, with due regard to their ages and maturity.
4 *Holistic approach.* A holistic approach recognises the social, emotional and physical needs, not simply the academic and cognitive needs, of both children/young people and their parents.
5 *Active participation of parents in school and the broader community, including marginalised parents.* Parental input into school policy and practices, as well as their children's education, requires both a general strategic commitment and a distinctive focus on marginalised parents' involvement.

6 *Differentiation in prevention approaches.* Different levels of need require different strategies to meet them, including those students and families that are experiencing moderate risk and chronic need.

7 *Building on strengths.* Promoting strengths in effect challenges the negative deficit labelling of vulnerable groups and seeks to promote growth (both for individuals' personal and educational development and for system-level development) rather than simply prevent. This is to create an inclusive school culture, involving respect for heritage and situation of young people with different backgrounds, e.g., class, gender, ethnicity, LGBTI+ youth and students with different learning abilities.

8 *Multidisciplinary as a multifaceted response for students with complex needs.* A range of actively collaborating professionals is needed to address the complex, multifaceted needs of marginalised groups.

9 *Representation and participation of marginalised groups.* Marginalised groups include those experiencing poverty and social exclusion, those at risk of early school leaving, those experiencing bullying, mental health difficulties and/or special educational needs, and in addition, some groups of migrants and ethnic minorities.

There must be a distinct focus on the processes and structures that ensure these groups' representation and participation. This also requires a curricular focus such as multiculturalism or adjusting some parts of curriculum to the previous knowledge and everyday experiences of children of immigrants, e.g., post-colonial theories in subjects like social science and literature.

10 *Lifelong learning.* Lifelong learning, from the cradle onwards, requires a distinct educational focus on active citizenship, personal and social fulfilment, intercultural dialogue across communities, and additionally on poverty, social inclusion and employment. It embraces informal learning, as well as nonformal and formal education classes relying on active learning methodologies.

Equity as resource allocation and prioritisation to remove socioeconomic and sociocultural barriers to educational access, engagement and attainment

Equity in education is an issue of global relevance. Ultimately attainment of an equitable education system is evidenced by access, engagement and attainment indicators that reveal no impediments due to socioeconomic or sociocultural factors. This is consistent with the conception of equity in the UN GEM (2020) report. Headline targets such as SDG goals and EU targets on reducing early school leaving, increasing participation in third level education and improving basic skills attainment in literacy, maths and science offer key staging posts for equity as part of system development. These are history-specific, incremental and changing based on system gaps regarding equity and inclusion. They can help focus attention on resource allocation increase and prioritisation to those in need, issues also highlighted in the OECD's (2007, 2010) documents.

The OECD 2008 review on equity in higher education foregrounded a contrast between equity as inclusion and equity as fairness. The former is treated as focusing on developments in the absolute number from hitherto underrepresented socioeconomic groups. Those from socioeconomically marginalised background may improve their educational outcomes in greater numbers. This is to be distinguished from the latter concern with the proportional

distribution of students' outcomes from marginalised groups, relative to other groups. Marginson (2011) highlights that the 2008 OECD review of equity in higher education 'again placed the main emphasis on fairness, but gave more weight to inclusion than it did in 1985' (p. 24). Marginson's (2011) perspective on inclusion operates within a much more restricted conception of inclusion than that of the UN GEM report (2020), when Marginson (2011) offers the following account:

> The expansion of inclusion is seen as both a means to progress fairness, because it is easier to move relative shares around in a period of overall growth, and also as an end in its own right, though the apparently dull incremental objective of inclusion often takes second place to the Robin Hood challenge of social redistribution embodied in the fairness goal.
>
> *(p. 24)*

While our Handbook is situated against a much wider, expansive understanding of inclusion than inclusion as absolute number gains, it to be distinguished from Marginson's (2011) argument for an increased policy emphasis on inclusion aspects over equity as fairness' focus on resource prioritisation. Our conception of multi-layered equitable inclusive systems is still firmly focused on the central importance of improving and ultimately eliminating the differences in educational outcomes that arise from socioeconomic and sociocultural barriers in education and society. The expansion in our Handbook of the dimensions of focus and relevance for inclusion-related issues as opportunities to overcome barriers to educational access, engagement and attainment involves a commitment to resource redistribution, as part of equity as fairness. Moreover, it places itself in clear distance from a viewpoint such as Marginson (2011) that 'no democratic politician commits electoral suicide in a frontal conflict with social privilege in education' (p. 32). Structures of privilege require dismantling, as part of a process of overcoming various layers of system blockages (Downes, 2014) hindering change in systems in and around education, as well as society.

While the UN GEM report (2020) advocates for 'inclusive societies' (p. 18) and the OECD (2022) Declaration on Building Equitable Societies through Education seeks 'more equitable societies' (p. 2), the UNESCO Faure report (1972) offers a conceptual critique of blocked societies and blocked educational systems which preserve the privilege of an elite. The established elite offers a convenient and formally equitable method of recruiting its successors across generations, through educating those from its own social class while picking out a selected few from the less favoured social classes. This method offers a number of advantages for the ruling social classes: It gives society a safety valve; it makes sure of fresh blood for the elite, while giving them a good conscience through the provision of formally equal opportunities. As noted elsewhere (Downes, 2014), blocked educational institutions are reminiscent of the static society in Plato's Republic, where political and thus educational power resides with the class of guardians, in contrast to those of the common people or the soldiers—with the proviso of Plato that, in exceptional cases, a promising student may be promoted from the other social groups into the guardian class. This extends a caesura in Bronfenbrenner's social-ecological systems theory regarding system blockage to focus also on inclusion at a wider societal level beyond education. Macrosystem issues of poverty, racism and discrimination must always be held in mind as part of such an analysis. As the UN GEM report (2020) observes 'a quarter of a billion of children, adolescents and youth are not in school' 'primarily due to poverty but also language, location, gender and ethnicity' (p. 7).

Gilligan's (1982) well-known contrasts between care and justice approaches are a relevant reference point for consideration of the intertwinement of inclusion and equity concerns. Many chapters in the Handbook invoke a rights-based approach, while others interrogate systems of care in and around schools. Care-related concerns, not only in terms of support services but also communicative styles, attitudes, climates and social relationships in school are more obviously in the terrain of an inclusion over equity focus. However, this is not to then map justice concerns uniquely onto equity; inclusion issues are also central to a human rights-based lens, both for special educational needs and for the expansion of inclusion concerns to socioeconomic and sociocultural issues.

Allied with a commitment to key principles underpinning equitable inclusive systems and a broadening of understandings of equity, as well as inclusion, the organising theoretical frameworks of this Handbook are based on a number of conceptual movements as proposed 'turns' for education. These interrelated though distinctive movements are an emotional–relational turn, a spatial turn, specifically a concentric spatial turn, and a dialogical turn, also encompassing superdiversity and intersectionality theory.

An emotional–relational turn

A notable implication of the restricted definition of inclusion to a 'basic minimum standard of education for all' (p. 11), largely focusing on basic skills attainment in the OECD's (2007) ten steps to equity in education, is that emotional–relational features of inclusion and exclusion became largely excised from view. None of the ten proposed steps to equity in education foregrounded emotional–relational issues (Downes, 2010, 2011a).

Over the past decade there has been a growing international recognition of the impact of mental health issues as a crisis affecting early school leaving for children and young people (Quiroga et al., 2013; Esch et al., 2014), as well as on loneliness in school as being as big a factor as poverty and poor school attainment in early school leaving (Frostad et al., 2015) and school belonging (PISA, 2018). This mental health crisis for young people is reported as exacerbated by the COVID pandemic 2020–2023 and the various lockdowns and school absences (Orgilés et al., 2020) and results from perceived isolation, poverty and financial concerns, home overcrowding, inadequate facilities or a reduction in social interactions (Smith et al., 2020). The COVID-19 crisis widened existing inequality gaps and showed again the importance to distinguish the impacts of persistent poverty over a child's life and current poverty to understand children's educational outcomes. Cumulative effects of poverty are associated with more detrimental educational outcomes (Perkins, 2018). Nonetheless, poverty has long been recognised as impact detrimentally on mental health of children and their families (WHO, 2003; Kessler, 2009; OECD, 2018; Patalay & Fitzsimons, 2018).

In addition, and frequently overlapping with poverty-related concerns, mental health issues of migrants and minoritised groups is also a real and increasing concern (Lebano et al., 2020). Discrimination impacts stress and mental health outcomes of minoritised youth (Njoroge et al., 2021; Brandt et al., 2022), leading to more academic futility (D'hondt et al., 2016). The educational impacts of the lethal cocktail of poverty and other adverse childhood experiences (ACEs), including discrimination, are gaining global recognition in international research and policy.

The ACEs framework tends to examine ten types of trauma: emotional abuse, physical abuse, sexual abuse, emotional neglect, physical neglect, parental separation/divorce,

family violence, household substance use, household mental illness and imprisonment of a household member (Dong et al., 2005). Elamé's (2013) review of ethnic minority and migrant students' school bullying experiences highlighted the key role of the teacher in either preventing or promoting discriminatory bullying. The OECD (2007) report does raise the issue of discrimination in school as an equity issue, a further step is to treat this as an inclusion issue. Also, the impacts of discrimination experiences go beyond discriminatory bullying and involve peer experiences, micro-aggressions in society and seeing others being discriminated against.

While socioeconomic conditions at home, as well as experiences of discrimination, othering and stereotyping, often enter the school buildings, a further driving engine for this emotional–relational turn for inclusion and equity in education is concern with authoritarian teaching impacting detrimentally on students' motivation and wellbeing. Such fear- and anger-based communicative styles were highlighted in the World Health Organization's (2012) international survey of students' wellbeing, which accentuated the need for caring relationships in school while explicitly raising concerns about teachers 'not publicly humiliating students who perform poorly' (p. 62). Systemic issues pertaining to communication and relationships in schools has been a feature of school climate research (Cohen, 2006).

Apart from building caring relationships between school staff and children, also peer bullying requires attention. A review of international school bullying research for the EU Commission (Downes & Cefai, 2016) highlighted the striking commonality of risk factors and system wide supports needed for both early school leaving and bullying prevention. These include first of all, common systems of supports including a transition focus from primary to post-primary, multi-professional teams for complex needs, language support needs, family support services and education of parents regarding their approaches to communication and supportive discipline with their children, outreach to families to provide supports, addressing academic difficulties. Second, both systems fighting bullying and early school leaving have common issues requiring an integrated strategic response, including the prevention of displacement effects of a problem from one domain to another, such as in suspension/expulsion which may make a bullying problem become an early school leaving problem. Thirdly, both have common causal antecedents (negative school climate, behavioural difficulties, trauma) and require teacher professional development and pre-service preparation focusing on developing teachers' relational competences for a promoting a positive school and classroom climate, including a focus on teachers' conflict resolution and diversity awareness competences (Downes & Cefai, 2016). Understanding these risk factors and support needs is relevant to consider such types of victimisation (i.e. being bullied), as the latter has been linked to lower academic achievement and other behaviours such as disengagement, absenteeism and early school leaving (Fried & Fried, 1996; Glew et al., 2005; Green et al., 2010; Nakamoto & Schwartz, 2010; Brown et al., 2011) and mental health (Ttofi et al., 2011; Swearer et al., 2012; Biereld et al., 2015; Juvonen & Graham, 2014; Radliff et al., 2015).

Themes pertaining to inclusion such as early school leaving and bullying have often been examined in parallel, with distinct research and policy communities. Building on the official evaluation of the Implementation of the EU Council Recommendation on early school leaving recommendation that the 'Policies aimed at tackling ESL [early school leaving] should be further integrated with those targeting anti-bullying as well as mental health and wellbeing, including trauma' (Donlevy et al., 2019), the 2022 EU Commission *Pathways to School Success* 'flagship' Council Recommendation makes explicit the need to combine national

strategies for both early school leaving and bullying prevention, while also highlighting the need for emotional counsellors/therapists in schools as part of an inclusion approach,

> Within inclusive and accessible settings, offer enhanced individualised support for learners with multifaceted complex needs, including social, emotional and mental health needs (e.g. personal tutoring, individual learning plans, interventions by specialist in emotional counselling, psychotherapeutic interventions, multi-disciplinary teams, family support) (p. 24).

The restricted definition of inclusion in the OECD's (2007) report on equity in education allowed for more rigid borders to be held between health and education with regard to support for the needs of socioeconomically and socioculturally excluded groups. The UN GEM (2020) report provides numerous examples of cross-sectoral working and multidisciplinary teams to help break down these borders, an emphasis on the fluid boundaries between health and education that has additionally gained force since the COVID global pandemic. This requires a reconceptualising of schools as not only being professional site for teachers but also co-located service for multidisciplinary team supports for students with complex needs pertaining to trauma, poverty (Downes, 2011) and related adverse childhood experiences. This reconfiguration of the boundaries between health and education in schools is given emphasis in section IV of the Handbook, *Bridging Health, Wellbeing and Education*. Moreover, it builds on the UN Transforming Education Summit 2022 statement that 'it is also critical to support learners' nutrition, physical and mental health, for example, through the expansion of school counselling and school meals programmes' (p. 4).

An acceleration of emphasis on wellbeing, beyond simply pedagogical wellbeing in education (Pyhältö et al., 2010), has also brought an increased international research and policy emphasis on social and emotional education with regard to its benefits for social inclusion in school (Cefai et al., 2018). However, this is not necessarily to endorse all of the OECD's (2015) increased interest in this area in the past decade, with concerns regarding prescriptive approaches linked with a social conformity and social control agenda in the area of social and personal development (Cefai et al., 2018; Cefai et al., 2021). Social and emotional education must operate in a climate of belonging and respect, aspects the UN GEM report (2020) foregrounds as central to defining inclusion (p. 11).

A spatial turn: a critical theory of space in systems

Just as marginalisation is a spatial concept (Massey, 2005), inclusion and exclusion also rest on spatial understandings where space itself needs to be understood as a system, as an organising dynamic system of relations (Downes, 2020a). A critical theory of spatial systems of exclusion and inclusion is drawn from two strands of thought. One strand is a spatial turn in education, the humanities and the social sciences. A 'spatial turn' is observed as taking place across a range of disciplines, such as geography, sociology and education (Massey, 2005; Gulson & Symes, 2007; Ferrare & Apple, 2010; Downes, 2016). This invokes a shift away from preoccupation with sociotemporal relations.

An acceleration of focus on spatial dimensions has given recognition to the role of space, not only as a vehicle for dividing practices, surveillance and regulation, influenced by the work of Foucault but also in investigating connective potentials in space through 'new spaces of engagement wherein adult–child relations get reconfigured' (Mannion, 2007, p. 410).

This critical discourse on divisive and relational spaces, on space as 'a powerful project of segregation' (Armstrong, 2007, p. 107), requires further development to explore its potential role for equitable inclusive systems in education. For scrutiny of educational systems, Ferrare and Apple (2010) seek understandings of 'spatial processes in education [;] we not only need these "new" theories, but we also need to employ methodological tools that "think" spatially' (p. 216).

It is to be noted that the early Foucault (1972) postulated a fundamental structure of exclusion, though he retreated somewhat from this position in his later work (in response to trenchant critique from Derrida, 1978, see Downes, 2012), thereby emphasising discourses and language pertaining to exclusion rather than a fundamental structure. Treating this early Foucauldian fundamental structure of exclusion as diametric spatial opposition offers a bridge between the general critical spatial turn and a further second strand of a concentric spatial turn.

Developing a concentric spatial turn for inclusion and equity in education

In this Handbook, we aim to develop a concentric spatial turn for inclusion in education and beyond (Downes, 2020a, b), treating space itself as an active system. This critical spatial approach invites, first of all, a questioning of shift from diametric spatial systems of assumed separation, exclusion, us/them othering, closure and above/below hierarchy (Downes, 2020a). A second challenge is made to Western ethnocentric conceptions of space which tend to assume either that space is an 'empty' 'nonentity' (Descartes, 1954, p. 200) or is based on Western Aristotelian diametric structured logic that A and non-A are mutually exclusive (Downes, 2020a). Bridging the material, social and symbolic, these relational spaces are not simply reducible to space as place (Downes, 2020a).

Thirdly, a focus on interplay between cross-cultural spatial structures and processes of concentric and diametric relations also seeks to address the neglected dimensions of system blockage and power relations in Bronfenbrenner's (1979) concentric social–ecological systems theory. In doing so, system blockage in diametric spatial terms could be better grasped and this could be overcome through a concentric spatial systemic movement. Space can be a mediating system condition to interact with and offer a bridge between the structure-agency dialectic that haunts so much of sociological thought in its interrogation of the social and individual.

A dialogical turn

A dialogical turn for inclusion in education seeks to dismantle traditional power hierarchies. A key thread in such a drive for the inclusion of marginalised students' and groups' voices is Art 12 of the UN Convention on the Rights of the Child. However, it is notable that the UN Convention on the Rights of the Child 1989, while emphasising the voices of young people, does not contain a specific right to freedom from poverty (Nolan & Pells, 2020), or a strong anti-poverty focus. In a European context, implementation of a children's rights agenda to ensure their voices are heard in matters affecting their own welfare still requires much more improvement across a range of sectors including education (Day et al., 2015). The United States is the sole UN Member State not to have ratified the UN Convention on the Rights of the Child, with ramifications for a dialogical turn for education and research in that context.

Concerns with dialogue and inclusion expose the risk of tokenistic and manipulative dialogue in the context of active citizenship (Arnstein, 1969), a danger that arguably applies *a fortiori* for children, marginalised and minoritised groups. Others conceptualise a dialogic turn in psychology in terms of a shift towards intersubjectivity and communication as the primary factors in learning (Racionero & Padrós, 2010).

A key limb of a dialogical turn is a phenomenological concern with lived experiences of marginalised individuals and groups, as well as common patterns embedded in these lived experiences. This recognises that children, young people and marginalised groups are active agents and need to be treated as subjects of policy not merely as objects of policy (Downes, 2014, 2020). Inclusion as recognition requires a power shift across school systems globally. Said's (1978) *Orientalism* offered a trenchant critique of treating large groups of people such as 'the East' as vast abstractions where there is no attempt at dialogue directly with these groups treated as the other to engage with their lived experiences. Said's (1978) concerns can be construed as being not only a leading part of a dialogical turn but also one the embraces the need for phenomenology, to engage with lived experiences of concrete individuals. Likewise, Taylor, Walton and Young's (1984) turn towards a left realism in criminology sought to focus on lived experiences of crime in working class communities.

Intersectionality, superdiversity plus recognition and celebration of social and personal identity

The three conceptual moves require us to attend to both intersectionality and superdiversity of the issues and concerns addressed in this Handbook. As well, we aim to address the UN's concern for loss of recognition and celebration of identity and places the onus on schools to address these, 'schools can prevent stigma, stereotyping, discrimination and alienation' (UN GEM report, 2020, p. 18). Dworkin (1977) terms these issues, equality of concern and respect.

A key drive towards intersectionality involves the recognition of the inadequacy of mere categorisation, whether in terms of social class, ethnicity, gender, etc. As Tajfel (1978) highlights in social psychology, categorisation is a simplification for action. It is a short-circuiting of deeper truths of experience and understanding. In some legal jurisdictions in the common law tradition, equity is treated as a compensatory principle of flexibility to mediate the injustices of rigid applications of rules as categories, as the letter of the law; the category brings an unjust decision and equitable principles are invoked to avoid the injustices of the blunt instrument of such categorisation. The individual case may differ from the category.

As mentioned earlier, migrants and minoritised groups are often not heard in systems, frequently being excluded from being part of dominant voices in society and education. The growing entrance of the term superdiversity involves a resistance to mere stereotyping and homogenising groups into abstract categories bereft of voice and dialogue, as part of a concern for personal identity and more fluid understandings of social identities. Rawls' (1971) future rather than past focused social contract framework in *A Theory of Justice* postulates a veil of ignorance in the formation of the social contract. This implies an abstract, impersonal other which is open to critique from the perspective of relational conceptions of values and justice, such as those of Gilligan (1982) and Benhabib (1987) that seek engagement with a concrete other. This is a precursor to more recent concerns with a differentiation that is not glossed over by swathes of abstractions.

Superdiversity addresses such concern. The term, coined by Vertovec (2007), has been used to recognise the exponential increase in the categories of migrants in recent years in terms of nationality, ethnicity, language, religion and other process-oriented classifications such as motives, patterns and itineraries of migration, processes of insertion into the labour and housing markets of the host societies in Western countries such as across Europe and North America, as well as other parts of the world. Superdiversity represents a new attempt to move beyond one-dimensional fixed analysis of diversity, equity and inclusion in order to unpack the increasing complexity of new social formations and identify more nuanced patterns that underlie societies that are increasingly unequal and unjust. By attending to new social formations and identities in both its complexity and fluidity, superdiversity also encourages critical engagement of multiple intersections and tensions between new and old patterns of diversity with more precision and accuracy, as well as the rich interactions between superdiverse identities and perspectives (Li et al., 2021). Furthermore, superdiversity can help clarify the sociohistorical and sociopolitical contexts for the traditional one-dimensional form of inequity based on race, gender, class, locale or disability to allow proper identification of intersectional discrimination and therefore can support systems and structures to generate more 'localised, flexible, non-standardised approach' to respond to 'the fluid, highly variable and ever-changing nature of the relationships across language, power and identity' (King & Bigelow, 2018, p. 469). As Vertovec (2019) points out, superdiversity 'could simultaneously take into account the compound effects of multiple variables or characteristics', which is 'the inherent approach signalled by the concept of intersectionality' (p. 134).

Structure of Handbook

The key thematic domains in this Handbook are organised around this framework of multi-layered equitable inclusive systems in education. These domains are as follows:

- Developments in Theoretical Approaches
- Funding Models and Structures for Equity and Inclusive Systems
- Exclusion and Discrimination
- Bridging Health, Wellbeing and Education
- Agency and Empowerment
- Outreach and Engagement

These domains are not to be treated as separate 'categories' from each other. There is enormous synergy of concern between them. Equity and inclusion are both processes and outcomes, means and ends (see also UN GEM report, 2020, p. 10), requiring interrogation of underpinning structural constraints for development. This Handbook explores this intertwinement through a deliberately interdisciplinary set of contributing chapters. These include education, psychology, sociology, economics, philosophy, politics, anthropology, law and social policy. No one discipline has a monopoly on this domain of relevance, to interrogate the multiple layers and system dimensions for reform that is the task of a global education agenda.

It is to be emphasised that our Handbook is far from a complete or comprehensive exposition on issues of equity and inclusion in education. Rather it is a step towards building an international interdisciplinary research, policy and practice community, to interrogate and advocate for system development and change for promotion of multi-layered equitable

inclusive systems in education as part of developing inclusive societies. The international focus of this Handbook encompasses regions of Europe, North America, Asia and Oceania.

Whereas supranational organisations such as the UN, OECD, EU Commission clearly recognise the central importance of equity and inclusion issues in education, at least in their policy documents on these themes, treating these as global concerns pertaining also to peace, social cohesion, democracy, migration and wellbeing, this can be placed somewhat in juxtaposition with the much more peripheral embedding of this thematic domain in universities and in initial teacher education departments. That this is an international issue of strategic concern regarding university structures and priorities has been recognised in the official evaluation for the EU Commission on the implementation of the EU Council Recommendation on Early School Leaving Prevention (Donlevy et al., 2019). It is recognised to be crucial to development of a research community and community of practice in education globally for promotion of multi-layered equitable inclusive systems.

It is very much recognised that this emergent domain of multi-layered equitable inclusive systems in education is far from being comprehensively treated in this Handbook. Promising areas such as the arts and sports have not been addressed here. Likewise, issues such as the digital divide and inequities in basic competencies in maths are outside the scope of this Handbook. The necessary intertwinement of equity and inclusion is far from being a closed domain for future investigation. While it is to be recognised that issues of inequity in education are central to the needs of the Global South, this area requires a Handbook of its own to give this vital issue a distinct scrutiny of its own and is only touched upon to a limited degree within the scope of this particular Handbook. Moreover, other dimensions of othering in education, such as regarding sexuality, religion, disability and special educational needs merit a distinct focus that is largely beyond the scope of this Handbook.

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SECTION I

Theoretical frameworks

2
FRAMING AND PRACTICING EQUITY, DIVERSITY, INCLUSION, AND DECOLONIZATION (EDID) IN INCLUSIVE EDUCATION SYSTEMS

Progress, tensions, and ways forward

Guofang Li and Lilach Marom

Introduction

As educational inequalities persist and widen due to the impact of the COVID-19 pandemic and continued growth of global mobility (OECD, 2021), many educational systems have declared equity, diversity, and inclusion (EDI) as core principles for social justice in education at all levels including K-12 and higher education. In some documents, the term is also referred to as DEI (diversity, equity, and inclusion). EDI has its roots in the 1960s civil rights movement in the United States and has since expanded to address diverse forms of marginalization (i.e., in gender, sexual orientation, religion, country of origin, and other identities) in multiple national and educational contexts (Beavers, 2018). In broad strokes, equity seeks to ensure fair treatment, equality of opportunities, and fairness in access to learning and resources. It aims for students of all groups and backgrounds to achieve their full potential and engage as full human beings in educational institutions. Diversity is about acknowledging and respecting a wide range of different and intersecting personal, group, or community attributes (e.g., race, ethnicity, gender, disability, sexual orientation, gender, national origin, tribe, caste, socio-economic status, thinking, and communication styles). Inclusion refers to how diversity is leveraged to create a culture of belonging by actively inviting and enabling the full contribution and participation of all students (Baker & Vasseur, 2021). Given its several decades of evolution, there are multiple, and at times contradicting, interpretations of each of the terms composing EDI.

Recently, with growing awareness of the ongoing cultural, linguistic, social, and economic damage of colonialism and with calls for Indigenous sovereignty (Belfi & Sandiford, 2021), decolonization has been acknowledged as core for social justice in education, especially

in Western settler colonies in which education institutions have been privileging and universalizing Western knowledge systems while marginalizing Indigenous forms of knowledge (Donald, 2022). Decolonization aims to identify, challenge, and undo or replace assumptions, ideas, values, and practices that reflect Western colonizers' domination and restore and redo Indigenous worldviews and knowledge systems (Joseph, 2017). Whether to add decolonizing to an EDI frame or pose it as an overarching alternative frame, is a matter of debate (Thobani, 2022a). When adding decolonization, the latest iteration of EDI has merged into an umbrella term: EDID (equity, diversity, inclusion, and decolonization).

While EDID principles are now prevalent in many educational policies, K-12 and higher education systems in many Western societies still privilege Eurocentric White, middle-class norms and values that have been designed with "mainstream" students as the mold (Henry et al., 2017; Thobani, 2022a). Consequently, there are still persistent educational opportunity and outcome gaps both across the global north and south, where socio-economic, gender, race, and other forms of inequity and geopolitical factors continue to shape educational attainments (OECD, 2021).

These gaps were further intensified by the impact of COVID-19. During the pandemic, students and learners from equity-seeking groups were found to face both socioemotional and academic challenges, leading to COVID-slide in school achievements due to the reduced social interactions, language input, and access to learning resulting from COVID-19 health measures and remote emergency instruction via digital technologies (Pier et al., 2021; Rogers et al., 2021). Recent international reports show that these COVID-induced academic slides continue to shape minoritized and vulnerable students' learning trajectories as countries enter a new (third-year) phase of the pandemic worldwide (Juniper Education, 2022; National Center for Educational Statistics, 2022).

These old and emerging challenges suggest an urgent need to re-examine the barriers to social justice in education across all levels of the educational systems and reconceptualize the policy, curriculum, and practices for a more equitable learning environment that enables the narrowing of the persistent achievement gaps. As educational systems seek to better deploy their recovery efforts and implement changes to address the ongoing barriers to achievements in K-12 and higher education post-pandemic, we argue that EDID must be central to these re-molding and rebuilding efforts.

In this chapter, we explore current EDID discourses and policy uptakes through the case of the Canadian education system (K-12 and higher education). We aim to identify areas of progress, unpack existing tensions, critiques, and gaps in current EDID uptakes, and suggest ways to further implement this work in order to create more just educational institutions in global contexts.

Defining EDID

While educational systems worldwide agree on the basic meaning of EDID and its outcome goals, the composing terms and their intersections vary in different political, national, and institutional contexts. These variations often lead to different uptakes in diverse educational contexts. Before we attend more closely to these differences, we present a working definition, based on terminologies commonly used in the Canadian education context.

Diversity acknowledges differences including differences in perspective and lived experiences as a fact in every societal and educational setting and is the scaffolding for EDID (Government of Canada, 2019). The reality of diversity, which is ever-growing and becoming

more complex in a global world (Li et al., 2021), calls for an intersectional approach to unpack how individuals and groups are positioned within a given societal context in ways that might advance or disadvantage them. While diversity is rooted in the recognition of difference as a human condition, it is not about identity-based separation but rather an invitation for ethical relationality across differences (Donald, 2009). Traditional approaches to diversity see it as something to be celebrated, as symbolized by the Canadian mosaic while more recent anti-racism approaches premise diversity "on the existence of structural inequity which is based on race and requires an active response," and aims for greater representation of marginalized group (Bernhardt et al., 2019, p. 9).

Inclusion connects the recognition of diversity, with the goal of ensuring that all people feel that they fully belong and are welcomed to be who they are, within the societal or educational context in which they take part. For that to happen, educational institutions must identify and dismantle barriers to wholesome participation. In the context of educational systems, inclusion means creating accessible spaces and assuring that diverse ideas, knowledge systems, and contributions are valued and supported. Also in this case, critical scholars challenge the definition of inclusion, which historically is associated with students with disabilities and therefore can be underlined by deficit thinking (Wolbring & Lillywhite, 2021) to understanding inclusion as central to excellence. Canadian universities acknowledge that "while progress has been made over the past few decades, we recognize that there is more we can – and must – do to truly achieve inclusive excellence" (Universities Canada, 2017, n.p.).

Equity, which is of particular importance in the context of this book, is an essential piece in the EDID mix as it is the vertex that connects the reality of diversity to the goal of inclusion. Equity extends the notion of equality that assumes equal treatment to all individuals, to a more complex recognition of diverse human needs. While equality assumes an "even playing field," equity contests that the game is rigged in multiple ways, which leads to the advancement of certain groups over others. The end goal of equality and equity (i.e., a just society) is similar; yet equity sustains that there is a need for dismantling barriers and purposefully advancing marginalized groups in order to achieve this goal (Baker & Vasseur, 2021). In educational systems, equity translates to removing barriers to access and success at all levels of academic institutions and for all the participants of the institutions (e.g., students, faculty, and administrators). An area of concern with regard to equity is that it has been taken up in the global educational arena as something that can be achieved and measured by market-based policies, but such an approach consequently creates an unequitable distribution of education and jobs (Thomson, 2013).

Decolonizing in education is about acknowledging the underlining Western European worldviews in Western education systems and dismantling the colonial structures that have done damage to Indigenous peoples. Seeing colonialism as ongoing (rather than past events), decolonization approaches aim to unpack the discrimination and marginalization toward Indigenous peoples in the current education system, "unlearn" colonialism, and create education systems that acknowledge Indigenous knowledge systems and are connected to Indigenous communities (Donald, 2009). The end goal of decolonizing is to foster Indigenous sovereignty including control over education. However, critics argue that decolonizing and Indigenizing are being performed in education institutions without commitment to deep systemic changes (Daigle, 2019).

To sum up, EDID terminology pushes against the narrow understanding of educational institutions as sites of neutral knowledge transmission, and acknowledges these intuitions as sites in which power and hierarchies are being reproduced. It centers social justice discourse

at the core of education, in order to create welcoming educational institutions in which all students and teachers can flourish. Therefore, it is not surprising that EDID has gained a discursive centrality over more critical frameworks such as anti-racism and multiculturalism, as it "encompasses differences that apply to everybody, not just to those who can place themselves within a minority or disadvantaged category" (Tomlinson & Schwabenland, 2010, p. 103). In the next section, we demonstrate how EDID has been taken up in different jurisdictions and on different educational levels in the Canadian education system.

EDID policies and discourses in diverse educational contexts: the Canadian case

While the four elements are interconnected and intersectional, on the ground, the foci of EDID in educational systems differ. Within each national context, there exist vast variations in the on-ground attention to EDID in different systems in different national and geographical locations and at different education levels (e.g., K-12, higher education, and teacher education).

In the Canadian education context (K-12 education systems as well as higher education), references to diversity and inclusion were historically made through the frame of multiculturalism and equity through that of multilingualism. While Canada is the first country to embrace multiculturalism as an official policy (Fleras & Elliott, 2002), its liberal framing of multiculturalism highlights the "celebration of diversity" rather than unpacking power and hierarchies in Canadian society (Kubota, 2015). As such, racial inequity has remained largely "illusive" in major provincial policies (George et al., 2020).

In recent years, there has been a shift from diversity to decolonization, in particular, through Canada's Truth and Reconciliation 94 Calls to Action (Truth and Reconciliation Commission of Canada, 2015). There are attempts to include Indigenous ways of being in colonial education institutions. For example, Indigenous knowledge systems and worldviews are being added to the K-12 curriculum as one of the core competencies (BC's Curriculum, 2020), as well as to teacher education programs (Yee & Davidson, 2021). With this paradigm shift, Canada differs from the United States and other international contexts in which there is some attention to decolonization, but it is mostly on the margins. However, Canada lags behind in anti-Black racism as it is only starting to gain public awareness (DasGupta et al., 2020) but in the US context, major efforts have been devoted to racial inequity and ethnic diversity, particularly due to the "racial reckoning" after the murder of George Floyd in 2020 and the rise of the Black Lives Matter movement (Smith, 2021).

There are also differences in EDID discourses within the Canadian national context. Taking K-12 educational systems in Canada as an example, given that Canada does not have a national education system and each of the provinces and territories is responsible for their own educational provisions (Campbell, 2021), the focus on EDID can be quite different across the provinces. In Ontario, Canada's large eastern province, equity was defined through literacy and numeracy outcomes "in terms of standardized achievement results" for "specific groups of students" (i.e., English language learners and learners with identified special educational needs) while other demographic factors, e.g., those of Indigenous and Black students, systemic inequities, and multiple forms of discrimination were not fully addressed (Campbell, 2021, p. 424). In the neighboring province Nova Scotia, equity in K-12 systems is more directly oriented to inclusive education of students with special educational needs. While its inclusion policy has been broadened to include a lens of equity for all students it

still "sits alongside special education policies and procedures" without focus on removing structural barriers and changing local and systemic practices (Whitley & Hollweck, 2020, p. 307). The provincial educational policies of British Columbia engage with "language and special education in specific and targeted ways that promote equity, it practices symbolic anti-racism by engaging with race ambiguously, without specific funding, programming and directives in place for school boards" (George et al., 2020, p. 172). However, the province has adopted Sexual Orientation and Gender Identity curriculum and Indigenous education in all public schools (BC's Curriculum, 2020).

Furthermore, localized EDID policies also differ across different school districts even within one province. An environmental scan of equity policies in Ontario's 72 school boards yielded 785 policies addressing a wide range of topics such as overall equity and inclusive education plans; accessibility; voluntary self-identification of Indigenous students; workplace violence; workplace harassment; anaphylaxis; and progressive discipline. However, many topics including religious accommodation, antiracism, and ethno-cultural discrimination, anti-discrimination procedures for LGBTQ2+ students, gender identity, and socio-economic status remain under-represented in school board policy coverage (Shewchuk & Cooper, 2018).

Equity policies across the school boards suggest "wide-ranging views of, and actions for, what is to be included in the concept of equity and inclusive education – from overall plans to student accessibility to demographic data to staff and student safety to medical conditions" (Campbell, 2021, p. 421). In another in-depth analysis of 79 equity-in-education policies across eight school boards in southwestern Ontario, Rezai-Rashti et al. (2021) revealed that there was no critical articulation of equity and other related terms in all the 79 policies reviewed, and none elaborated on the importance of intersectionality and the complexities of multiple identities and how they contribute to social location and privilege or offered specific plans or strategies in terms of enhancing equity, diversity, and inclusion. As such, these policies, with their simple, generic interpretation of equity, "do little to ensure social and educational equity" and "most likely become non-performative"; and therefore, serve to sustain structural inequities (Rezai-Rashti et al., 2021, pp. 19–20). Segeren's (2016) further investigation of one school board's enactment of these non-performative, symbolic policies that lacked accountability mechanisms and adequate resources also concluded that these policies served as systemic barriers that drastically narrowed the possibility for equity work and consequently did not lead to any substantive change in educational outcomes of marginalized groups.

EDID policies and implementations in Canadian higher education institutions are found to embrace more critical discourses than the K-12 system. For example, Canadian universities endorsed an EDI charter, titled "Dimensions," recognizing that "equity, diversity and inclusion strengthen the research community, the quality, relevance and impact of research, and the opportunities for the full pool of potential participants" (Government of Canada, 2019, p. 1). The Canadian Research Chair (CRC) program, the most prestigious research funding program, has initiated EDI principles to guide the allocation of research chairs (CRC, 2019). Inspired by the work of the Truth and Reconciliation Commission (Truth and Reconciliation Commission of Canada, 2015) and its "94 Calls to Action," discourses about decolonization and Indigenization have become central in Canadian higher education, with universities developing Indigenization plans, courses, and resources (University of Windsor, 2022). In addition, multiple universities have signed the Scarborough Charter on anti-Black racism and inclusion in Canadian higher education (Scarborough Charter, 2022).

Tamtik and Guenter (2019) argue that "Canadian universities are gradually taking a pro-active approach to creating broader awareness and alleviating issues related to equity, diversity, and inclusion" (p. 52).

EDID has also become an integral part of Canadian teacher education (Ng-A-Fook et al., 2022). Teacher education programs nowadays often include cultural competencies and anti-racism as part of the curriculum (Gorski & Dalton, 2020). Teacher education programs in some provinces are required to include a mandatory course on Indigenous education and infuse Indigenization and decolonizing approaches into their curriculum (de France et al., 2018). In some universities such as the University of British Columbia, an Indigenous teacher education program (NITEP) has been established to prepare Indigenous teachers to address "educational issues pertinent to public and First Nations schools settings where their children attend school" (NITEP, 2022, para. 2).

To conclude, EDID principles have been taken up in international, national, and local educational policies. Yet there are differences in focus and implementation across diverse locations, areas, and levels of education, warranting an exploration of on-the-ground work and uptakes of EDID policies and discourses. In the next section, we aim to highlight some of the promising frames and practices as a compass for EDID work.

EDID work on the ground: theoretical frames and promising practices

In the context of EDID uptake at the policy level in many educational contexts, there are a plethora of well-developed and emerging theoretical frames and practices of equity work on the ground in the classrooms globally, including those addressing cultural diversity (e.g., culturally responsive/relevant/reciprocal/sustaining pedagogy), linguistic diversity (e.g., linguistically responsive teaching, raciolinguistics, and translanguaging), race (e.g., critical race theory), gender diversity (e.g., the gender equality framework), disability justice (e.g., Universal Design for Learning or UDL), and Indigeneity (e.g., decolonization/Indigenization), among others. These theoretical frames and practices informed by these perspectives all aim to provide equitable access to high-quality curricula and instruction, create supportive school and classroom environments, and foster success in retention and graduation. As a whole, while the different frames and practices address students' different identities, skills, and abilities, there is a call for moving toward a lens of intersectionality.

One of the EDID components that has received the most attention in education and made the most progress is cultural diversity. Following Banks' (1984) multicultural education, several other pedagogical models such as culturally relevant and culturally responsive pedagogy that address cultural diversity have been developed in the field. Culturally relevant pedagogy, stemming from Ladson-Billings' (1995) work on the pedagogical excellence of successful teachers of Black students in the United States, provides a theoretical model that "not only addresses student achievement but also helps students to accept and affirm their cultural identity while developing critical perspectives that challenge inequities that schools (and other institutions) perpetuate" (p. 469). Expanding Ladson-Billings' work, Gay (2000) called for a "paradigmatic shift in the pedagogy" from traditional instructional ideologies and actions for middle-class European Americans to those that are responsive to the cultural knowledge, prior experiences, frames of reference, and performance styles of non-middle-class, non-European American students such as Native American, Latino, Asian American, African American, and low-income students (p. 32). Challenging the unequal power relationships between home and school, Li (2008) further proposed a pedagogy of

cultural reciprocity that encourages teachers to engage in mutual learning of lifeways with minoritized students, parents, and their communities and routinize their lived experiences and knowledge in classroom instruction. These theoretical models aim to improve the academic achievements of students of diverse cultural backgrounds and at the same time sustain the cultural ways of being of communities who have been and continue to be damaged and erased through schooling (Alim et al., 2016).

These pedagogical models have been taken up in various educational systems globally, especially in K-12 educational systems, as equity frameworks to guide educators' work in the field. For example, Stembridge (2020) uses the tenets of culturally responsive pedagogy as a theoretical context to help K-12 teachers incorporate equity into behaviors, environments, and meaningful learning opportunities to address increasing cultural diversity in the classroom. Some recent efforts also emerged to address racial equity through culturally relevant/responsive pedagogy. For example, in Woodroffe High School in the Ottawa-Carleton District School Board in the province of Ontario, Canada, where there is a wide range of diversities in students' ethnicities, race, faith, family structures, socio-economic status, as well as sexual orientation, four teachers formed a professional learning community about culturally responsive/relevant pedagogy to focus on understanding racialized student experiences and racism and began to "transform [their] practices in different ways" to address equity (Ontario Teachers' Federation, 2022, n. p.).

In addition to addressing cultural and ethnic diversity, linguistically responsive teaching, translanguaging, and raciolinguistics have also been proposed and practiced in various educational contexts across the globe to address increasing diversity in students' languages. Arguing for the need to make content instruction more accessible to learners by attending to the language challenges they experience, Lucas and Villegas' (2011) linguistically responsive pedagogy provides teachers with tools (e.g., vocabulary scaffolding, strategic use of students' first languages) for extra-linguistic supports in the instructional process to address both social and academic language demands associated with the learning tasks. In alignment with viewing multilingual learners' home languages as assets, García and Li's (2014) translanguaging lens has been embraced in the field of education to capitalize on learners' multilingual repertoire which has been traditionally labeled as multiple discrete languages to disrupt monolingual ideologies and unsettle unequal power relations that have long impacted these students' schooling experiences. These approaches have been taken up internationally, and an example of the uptake in the Canadian context is the Canada-wide Multiliteracies Project which engaged multilingual learners in creating identity texts that make use of their linguistic and cultural capital (Cummins & Early, 2011). While linguistically responsive pedagogy and translanguaging focus specifically on affirming the linguistic identities of multilingual students, raciolinguistics examines how language is used to construct race and how ideas of race influence language and language use (Alim et al., 2016).

There has also been a growing attention to gender diversity and inequity in education globally, as it is central to social injustice. Various frameworks have been proposed, including earlier approaches such as women in development (emphasizing sex differences between boys and girls), gender and development (focusing on gendered power and structural barriers), post-structuralism (attending to fluid processes of gender identification), and human development perspective (addressing equality of rights and capabilities) (see Unterhalter, 2005). Among these various "fragmented" frames, women in development and gender and development approaches have been widely taken up by various governments, organizations, and educational systems to address gender inequality in education and contributed to a

better understanding of gendered power and structural barriers beyond a simple distinction of sex differences in education and has increased educators' awareness of gendered practices in classrooms and institutions (Unterhalter, 2005). These two emphases, broader access to education and gendered empowerment, were also the major foci of the Gender Equality Framework (EQUATE, 2008), which was developed to demonstrate "interrelationships among the concepts of gender parity, gender equity, and gender equality," reinforce "other key concerns such as access, quality, continuity, relevance, and learning outcomes," and emphasize "the relationships between and among students and teachers and boys and girls, implying the need to transform deeply ingrained behaviors and gender norms that have negative impacts on the aspirations and life choices of girls and boys" (p. 1). These two foci are currently "a global priority" at UNESCO in their recent calls for attention to gender equality throughout the education system in relation to access, content, teaching and learning context and practices, learning outcomes, and life and work opportunities in and through education (UNESCO, 2019, p. 1). As such, gender mainstreaming (i.e., fostering gender knowledge in all areas) has been developed and adopted as a long-term strategy globally that goes hand-in-hand with specific policies for the advancement of women to assess the implications for both men and women, of any planned actions, policies, or programs in all areas and at all levels (Council of Europe, 2021; Global Affairs Canada, 2017). This framework has generated different ways to assess the integration of the gender dimension in education and beyond (see Palmén et al., 2020).

While the ongoing attention to gender inequity in policies and perspectives has brought some success in narrowing the gender inequity in education, recent research across the globe indicates that the reality is far from ideal (Cascella et al., 2022; Deng, 2021) and gender inequity persists in various educational systems. In their special issue on critical perspectives on gender equality policies and practices in higher education that covered three global south countries and five global north countries, Crimmins and Barnard (2022) conclude that across all the study sites, there is "an endurance of discrimination that is (re)expressed at a cultural level with institutions acting as sites of resistance in the face of pressure to change" and "gender bias and resistance to gender equality actions were presented as difficult to explicitly discern and disrupt" (p. 2). Similar to policies and practices in other dimensions of inequity, there is a clear conclusion that "the impact of gender intersections with race on inequalities in the higher education sector," calling for an intersectional approach to addressing gender inequity (Crimmins & Barnard, 2022, p. 2).

Another paradigm shift in EDID is the expansion of the concept of inclusion from a narrow focus on disability as an individual problem (having an impairment is) to a social construct (Pothier & Devlin, 2006). All humans are different in some ways and these differences should not act as barriers to one's academic access and success. Rather, understanding inclusion should include an investigation if support and accessibility in educational institutions, not the impairment, creates the experience of disability. Thus, disability justice calls to move from framing disability as an individual problem that requires an individual solution (such as accommodation plan) to rethinking accessibility and inclusivity for all students (Titchkosky, 2011). There is a need to confront ableism in all structures and disciplines (not only in disability studies departments and accessibility services), because it is ingrained in all layers of education institutions (e.g., pedagogy, curriculum, admission, and hiring) (McKinney, 2016). The strive for disability justice intersects with other forms of marginalization, for example, Ressa (2023) demonstrates how his experiences as a Black-disabled African immigrant are informed by ableism, xenophobia, and racism.

One successful way to foster pedagogical inclusivity is UDL which "aims to change the design of the environment rather than to change the learner" (CAST, 2018, p. 1). Instead of designing the curriculum with an "average student" (which usually assumes a White, middle-class, male, and able-bodied student) in mind, UDL starts designing from the margins by providing choices, multiple ways of engagement and self-regulation, and different ways to present one's learning (Griful-Freixenet et al., 2017). When learning environments are intentionally designed to dismantle barriers, all learners can engage in meaningful and rigorous learning. UDL has been taken up in multiple educational contexts and disciplines and shares some similarities with Indigenous pedagogies (Davidson & Davidson, 2018) by seeing the learner as a full human and learning process as a holistic journey, incorporating mind, body, and emotions.

As we indicated earlier, decolonization and Indigenization approaches are becoming more prevalent in education systems across Canada. While earlier work has built upon aforementioned theoretical frames such as the agenda of inclusion and critical race theory (see St. Denis, 2011), Indigenous scholars have increasingly departed from these frames that are confined by settler citizenship to propose a new lens of examining settler colonialism not as past events or a context but as "an organizing logic and structure of governance" that serves to eliminate Indigenous peoples, replace their knowledges, and erase colonization (Taylor, 2021, p. 59). This settler colonialism lens helps educators and students "goes beyond antiracism" to "not only develop an awareness of colonialism violence but to also see how colonial governance functions to protect institutions that disavow and erase that very violence" (Taylor, 2021, p. 60). Guided by these old and new theoretical frames, the First Peoples Principles of Learning that include nine foundational Indigenous learning principles have been articulated by Indigenous Elders, scholars, and knowledge keepers to guide the development of the K-12 curriculum (BC's Curriculum, 2020) and teacher education (Kerr & Parent, 2018). Many positive curricular and pedagogical changes are taking place across educational systems. Some First Nations took control over their education systems grounding education in Indigenous communities, knowledge and pedagogies, and many resources are being developed to support reciprocal and respectful weaving of Indigenous perspectives in the curriculum (e.g., Yee & Davidson, 2021). Indigenous scholars offer educational opportunities that challenge the traditional Western curriculum (see, for example, Donald, 2022; Hare, 2021; Sanford et al., 2012).

Similar to other scholars working on other EDID dimensions, Indigenous educators and scholars call for an acknowledgment of "the complexity and intersectionality of Indigenous communities and Nations" and "the rich interactions between superdiverse identities and perspectives" (Yee & Davidson, 2021, p. 284). Building on the work of Grande's (2004) *Red Pedagogy*, which explores the intersection between dominant modes of critical educational theory and the socio-political landscape of American Indian education, Clark (2016) summarizes that Red intersectionality provides the tools to theorize not only the past but the current forces of colonialism as found within reserve politics, lateral violence, and identity politics; and it "does not center the colonizer, nor replicate the erasure of Two-Spirit and trans peoples in our communities, but, instead… attends to the many intersecting factors including gender, sexuality, and a commitment to activism and Indigenous sovereignty" (p. 51).

The above highlights of various theoretical frameworks and their informed practices demonstrate diverse foci under the EDID umbrella. It is evident that there is a growing consensus that EDID work is intersectional and that the struggles of equity-seeking groups tie

into each other and warrant collaborations across differences. Despite these theoretical and practical advances and development in EDID work in policy and on the ground, there are still persistent tensions and gaps in the EDID work across all levels. We turn to these discussions in the next section.

Unfinished work: moving toward mainstreaming EDID in educational systems

There is no question that EDID has become "indispensable" to education systems across the globe as all have "set into gear [the] equity/diversity/inclusion machinery" in the various levels of policy planning and implementation (Thobani, 2022b, p. 6). Yet, as noted earlier, widened achievement gaps and persistent educational inequity across diverse contexts globally suggest that there is deep-seated resistance to transformative changes in educational systems. Educational institutions have been found to superficially adopt EDID discourses and policies, without deep commitment to actions, and often as a way to avoid structural changes (Henry et al., 2017). This work is therefore far from being finished. We argue that to transform educational systems for EDID, three persistent tensions and gaps must be addressed: (1) simplistic and performative view of EDID; (2) inconsistencies in policies and between institutions; and (3) divisiveness and resistance to EDID initiatives.

1 Simplicity and performativity of EDID work

We believe that there is a need for a deeper and more critical engagement with EDID processes, particularly at the institutional level as there exists a gap between the language of EDID and actually doing the work to promote and acknowledge EDID (Ahmed, 2007). The ubiquitous use of EDID terminology in mission statements, strategic plans, advertisements, and websites of many educational institutions (OMara & Morrish, 2010) is not a valid indication of actual institutional support for EDID work. In fact, the excessive use of language related to EDID is often an indication of marketization and managerial discourses that are characteristic of neoliberal influences on the education arena (Savage et al., 2013). In some cases, EDID policies disproportionately advance "privileged Others" (e.g., White women) over "Other Others" (e.g., Indigenous women and women of color) (Smith, 2010). For example, many diversity frameworks "advocate cultural diversity and plurality but tend to be vague and to celebrate diversity rather than deal with inequity" (Henry et al., 2017, p. 302).

In some institutions, EDID becomes a celebratory "add-on," while still being grounded in White normativity (Ahmed, 2007). Discussions of EDID issues (e.g., race and racism) and social justice are included in the institutional policies and practices without deep commitment to change (Ahmed, 2007; Ladson-Billings, 1998). Many institutions offer diversity workshops training but they are often performative and not triggering deep commitment to change (Thobani, 2022a). Similarly, Indigenous scholars argue decolonizing and Indigenization goals often stay on the performative level as many institutions "incorporate (palatable) aspects of Indigeneity, while precluding the possibility of Indigenous sovereignty" (Thobani, 2022b, p. 29). Superficial changes can, in fact, contribute to the maintaining of White Eurocentric normativity because they convey an image of inclusivity under which it is easier to overlook how powers and privileges are still distributed unevenly in educational institutions (Daigle, 2019). Hence, EDID policies and action plans should center questions regarding the implications of

factors such as race, ethnicity, gender, class, and nationality as they pertain to accessibility and success in education.

2   Inconsistencies in policies and practices

There are multiple inconsistencies and tensions in EDID policy and discourses. The language of EDID can be easily co-opted, allowing for the appearance of progressiveness without dismantling the uneven accumulation of power. In a neoliberal market-driven educational arena, the appeal of EDID might have to do with it fitting neatly in "the rise of the knowledge economy with its narrative of knowledge-as-a-thing amenable to trade in a competitive global economy" (Barrow & Grant, 2019, p. 134). In this context, the increase in EDID references in UNESCO's Sustainable Development Goals holds both promise for new priorities and a danger of subjecting EDID policies to productivity measures in the service of the knowledge economy (Thomson, 2013). The reconfiguration of education institutions in the global arena from "pillar[s] of white supremacy into champion[s] of liberalism and multiculturalism did not root out but rather reworked its older colonial-racial structures and functions" (Thobani, 2022b, p. 14).

3   Divisiveness and resistance to EDID initiatives

As EDID discourses have shifted from the margins to the education mainstream, opposing discourses have also emerged. Some scholars argue that EDID discourses are underlined by religious fervor in that "institutional racism" has turned into a "one-size-fits-all" explanation, and that academics and teachers avoid critiquing progressive ideas out of fear of "being canceled" (Norris, 2020). While this form of critique is particularly heated in the context of higher education in the United States, it also underlies educational debates in the K-12 system (Nguyen, 2021), and become more prevalent in education systems around the world (Camp, 2022; Watts, 2021). After an increase in controversies (some highly circulated on social media) on EDID-related issues, some provinces in Canada (e.g., Ontario and Quebec) created specific policies to protect academic freedom. Some argue that there is an increasing tendency to silence academic debate when it comes to discussing issues falling under the EDID umbrella (Ben-Porath, 2017). We need to be cautious not to create a false dichotomy between promoting transformative EDID principles and engaging in deep controversial discussions. Acknowledging the colonial and exclusive foundations of education is a necessary starting point in seeking to build education systems where "when tensions arise, they are understood in the context of a critical consciousness" (Sun & McClellan, 2019, p. XI).

In conclusion, while the main tenets of EDID principles have been taken up in educational institutions, there are still gaps, critiques, and tough work ahead around EDID. As a transformative framework, EDID is not a definitive project that can be accomplished *via* an action plan, but an ongoing process that demands systems thinking. We need to move toward mainstreaming EDID work with an intersectionality lens, away from a compartmentalized piecemeal approach that addresses one strand of EDID as an add-on task. In order to facilitate mainstreaming EDID, changes need to occur in all layers of education institutions including the structural, curricular, and pedagogical levels. If not, EDID is at risk of becoming the new education buzzword, without offering a real structural change. Finally, it must be noted that while we argue for intersectionality and mainstreaming EDID, we caution against proposing and importing fixed guidelines to promote EDID across borders as education cannot be summed up by a universal prescription; and tensions around EDID and gaps between theory and practice must addressed against the unique contexts of the different educational systems.

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