

EQUITY, EQUALITY AND EQUIVALENCE - A CONTRIBUTION IN SEARCH FOR CONCEPTUAL DEFINITIONS AND A COMPARATIVE METHODOLOGY

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INTRODUCTION

A conceptual discussion of equity, equality and equivalence, and its different uses in the educational discourse, is a useful endeavor for purposes of theory, methodology and practices as well. The fact that the use of these notions has evolved in different ways over time depending on the particularities of social and political contexts arises many questions and increases the complexity of any attempt of cross-national and comparative studies. This article contains no answers but perspectives and suggestions on the some of the questions.

Earlier studies have discussed equity, equality and equivalence, extensively from different perspectives including: (a) questioning the essence of its discourse and analyzing the diversity of the objections to the ideal of equality (ANDERSSON, 1999; CLAYTON & WILLIAMS, 2000); (b) associating these categories with the theories of distributive justice (JENCKS, 1972; ROEMER, 1996); and (c) looking at theories and practice in search for explanations to current inequalities (DWORKIN, 2000; TEMKIN, 1993).

The conceptualization of equity, equality and equivalence largely demands going beyond a semantic analysis; a discussion of the concepts requires a contextualization within major frames of social and educational debate, among them social justice (BRIGHOUSE, 2000; HUTMACHER, COCHRANE & BOTTANI, 2001; LYNCH & LODGE, 2001). Epistemological and ontological considerations are required; another dimension which

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further problematizes the discussion is what could be considered a socio-political and historical dimension; that is, the various ways (and frames) in which these concepts have been used in the educational discourse over time in response to existing social and political «climates of opinion». The purpose of this article is to make an initial contribution to the ongoing debate of conceptualization of equity, equality and equivalence, and to highlight some of the challenges for cross-national comparative studies in this subject¹. This article is an outcome of the research project «What about equivalence? The concept equivalence and its different interpretations in different contexts, in different educational policy levels and schools practices» carried out by a research team at Örebro University, Sweden, with a grant provided by *The Swedish Research Council*. The project analyses issues of equity, equality and equivalence from the perspectives of school practices and discourse analysis. It also includes an inquiry into the international (European) discussion of the subject.

The similarity in conceptual perspectives on equity, equality and equivalence among scholars interested in this area has proven to be considerably higher than the agreement on best ways to analyze its relation with practices in different national education systems (MORENO HERRERA & FRANCIA, 2004)². When dealing with these three notions in this article there are shifts in focus between one concept and the others, which are mainly related to an acknowledgement of the interdependent relation existing among them; this also follows a line of argumentation shared with earlier studies (e.g. COLEMAN, 1990; FOSTER, GOMM & HAMMERLEY, 1996; HUTMACHER, 2001) in which shifts between these categories are frequent. It must also be considered the perspective supported in this article concerning the need to discuss issues of equity, equality and equivalence as parts of major analytical framework; these concepts could be considered as a matter of social justice and access to capital as it is argued in the following.

¹ This article is a substantially revised version of a paper presented at the conference of the European Educational Research Association (EERA), Hamburg, September 2003. The author is grateful to the participants in Network 18, Comparative Education and to many other colleagues who later contributed with criticisms and suggestions.

² The International Workshop «Educational Policies in Europe - Implications for Equity/Equality» held in Örebro University, Sweden, October 9-11, 2003, largely attempted to find a common approach to the concepts equity, equality and equivalence and the use of indicators. While in the first aspect there was to a great extent a considerable consensus, concerning the second one, that is indicators, there were remarkable differences in perspectives.

I. EQUITY, EQUALITY AND EQUIVALENCE - THE DILEMMAS OF CONCEPTUALIZATION

The value of a discussion on conceptualization of equity, equality and equivalence is supported by considerations such as the ones made by Lynch and Lodge (2001). Focusing particularly on equality, Lynch and Lodge (2001) provide grounded arguments which are useful both for a conceptual discussion of the categories at issue as well as for understanding the current challenges of cross-national comparative studies. Supporting the need to consider what was called above a socio-political and historical dimension when discussing issues of equity, equality and equivalence they argue that:

«The language such as the one of equality originated in other time, another age when naïve social scientist and political theorist failed to appreciate the complexity of the post-modern world, a word in which the grand narratives of Marxism, feminism and other normative discourses were redundant. Others suggested that to speak in terms of equality in education was to ally oneself too closely with the ethical assumptions of political theory, and too far away from the “objective”, analytical discourse of the social sciences» (Lynch & Lodge, 2001: 5).

As it might be understood from these arguments, the question when handling these concepts in current discussions is not just the definition in itself, not a semantic problem, but the underlying social context which make specific normative documents and practices in education to be labeled as more or less equals. Equity, equality and equivalence are more relevant if assumed as underpinning principles of democratic societies than their dimension as conceptual units in the educational discourse. Then, at this very point of the line of argumentation one could question whether «crossing the borders» of what might be «just a conceptual discussion» to be further clarified, to enter into the complex arena of social justice is a desired course of events. What are the implications for cross-national and comparative studies of bringing the discussion to broader frames such as social justice? The questions are indeed complex and so are the answers, it is not the intention to provide them here but rather to contribute to the ongoing discussion in search for clarifications.

In relation to the relevance of conceptualization Hutmacher (2001) argues that some conceptual clarifications are needed, particularly to distinguish

between equity and equality, and calls the attention upon the issue that in policy debate, as well as in the research literature, the two terms are often presented as synonyms, particularly when used in the English language. The need for conceptualization is argued to be a tenet for any further inquiry on the subject. Hutmacher (2001: 7) considers that «this semantic confusion may signal that all identified inequalities are considered inequitable» and in the following, questions «... but should they be?» According to this approach the answer to this critical question can only be addressed if the two concepts are used to define distinct, although interdependent, orders of reality.

Following this line of argumentation it seems useful to get to «basics» and start by looking at the definition of equity, equality and equivalence in 'merely' semantic terms, as presented in *The Oxford English Dictionary*:

«Equity: 1. The quality of being equal or fair; fairness, impartiality; even-handed dealing,

2. What is fair and right; something that is fair and right.

Equality: 1. a. The condition of being equal in quantity, amount, value, intensity, etc.

2. a. The condition of having equal dignity, rank, or privileges with others; the fact of being on an equal footing,

b. The condition of being equal in power, ability, achievement, or excellence.

Equivalence: 1. a. The condition of being equivalent; equality of value, force, importance, significance, etc.» (THE OXFORD ENGLISH DICTIONARY, 1961: 253, 262).

Assuming that these definitions are concise enough, it could be argued that we have here a ground of basic understanding to operate with in a further discussion on conceptualization. Wittgenstein (2001), however, alerts us about the differences emerging from different types of reading and the influence of the reader's own history in the subjective processing of the text, which again bring us back to the controversies of conceptualization. At this stage it is also worth making a remark on an issue further analyzed in the next section, that is, the influences of the methodological approach of the researcher in the understanding of the phenomena been examined (BOGDAN & KNOPP BIKLEN, 2003).

The concise analysis presented by Arnaud (2001) and Arnesson (2001), focusing respectively on equity and equality, problematise the discussion on conceptualization. On the one hand equity is associated to «fairness, impartiality, and justness» with dimensions that make it possible to consider it as «(a) an instrument to bring harmony into progressive societies; (b) a means of solving conflicts in some legal cultures» (ARNAUD, 2001: 4729). Equality is, on the other hand, linked to the basic notion that «everyone shall have the same»; it is however argued that different interpretations of the ideal disagree as to «(a) who should be included in ‘everyone’ and (b) in what ways it is important that people have the same» (ARNESSON, 2001: 4724). In both analyses there is an explicit acknowledgment of the historical relationship equity, equality and justice and its complex evolution; as Arnaud says:

«Equity and justice go hand in hand in western [...] philosophy. But the Roman root *aequus* was translated by two words which acquired two very distinct meanings through the ages: equity on the one hand, and equality on the other» (ARNAUD, 2001: 4730).

This distinction led to opposing political theories on law and justice which indeed have penetrated the educational discourse in the last four decades. According to Arnaud (2001: 4733) «a concern for equity is not tantamount to an insistence on equality» Therefore, equity «does call for deliberate efforts to reduce gross inequalities, to deal with factors that cause or perpetuate them, and to promote a fairer sharing of resources». This argumentation is considered to be «good as a political principle», but its limitations are at the same time raised with a question which is also of validity for policy making in education: what practical «legal rule» can flow from such abstract discourse? Arnaud (2001) concludes by acknowledging that even though the above mentioned assumptions could lead to many ambiguities and despite the lack of general agreement on conceptual issues, the relationship equality and equity appears as a newly contemporary and significant notion. This particular feature opens new possibilities for redesigning educational policies and to some extent supports Hutmacher's (2001) insistence on the need of clear conceptual framework as a starting point in studies of equity, equality and equivalence.

The conceptualization of equivalence appears to be equally problematic to deal with if compared to the discussion on equity and equality. There is,

however, a main aspect connected to the semantic of the word which makes the discourse on equivalence to be «more comprehensive» than the others. It might be argued that the consensus on the very initial understanding of equivalence is considerably higher than the one on equity and equality; this regularity can be even found in analysis which differs considerably in approaches and theoretical grounds (e.g., ENGLUND, 2004; WILDT-PERSSON & ROSENGREN, 2001). In a recent article Englund remarks that the «actual idea of equivalence has changed» but at the same time acknowledges that «its positive characteristics have remained constant» (ENGLUND, 2004: 90). What seems to emerge as a shared notion from these mentioned studies is that the socio-political and historical dimension, which was earlier mentioned, is more «visible» in different discourses on equivalence than what it is in equity and equality. In practical terms, as a research problem to handle, studies on equivalence have the advantage that this is a more explicit notion than equity and equality in, e.g., curriculum making and different steering documents.

The various issues earlier discussed makes conceptualization of equity, equality and equivalence to be a challenging endeavour, but though complex this issue should not be regarded as insuperable. One of the most relevant tenets for cross-national and comparative studies which arise from this complexity is the need of having an initial well-argued conceptual platform and analytical framework. There is also a need to decide upon the methodological path to follow, whether the convenience to compare «like with like» as demanded by Warwick and Osherson (1973) or to work with «anomalous cases» as argued by Pepin (2000; 2002). This particular still remains an issue open for further discussion.

II. INDICATOR OF EQUITY, EQUALITY AND EQUIVALENCE - AN ALTERNATIVE PATH FOR CROSS-NATIONALLY COMPARATIVE STUDIES?

The need of indicators has been strongly argued for in earlier studies (e.g. HEYNEMAN & LOXEY, 1993; MEURET, 1999, 2001). In various ways the arguments coincide in mentioning that any attempt to create an analytical framework for equity, equality and equivalence must take into account the

normative issues related to these categories not as «abstract philosophical questions but as an empirical issue» (HUTMACHER, 2001: 19). According to this line of argumentation indicators are expected to reflect what is considered fair or unfair, equal or un-equal, equitable or inequitable, equivalent or not. The question becomes problematic if, once again, we take into consideration the socio-political and historical dimension earlier mentioned in this article; both Hutmacher (2001) and Meuret (1998) show awareness of this conditionality when questioning the impact of the changes over time and space of equity judgments and the agreements and disagreements about equity criteria.

In favor of indicators Meuret (2001: 133) argues that equity of a school system «requires a particular configuration of inequalities, so that it can be properly evaluated or discussed only according to a system of indicators». Similar arguments are presented by Demeuse (2004) when discussing indicators which could allow a comparison of education system with respect to their equity and equality. Both Meuret (2001) and Demeuse (2004) acknowledge the controversies that a system of indicators might show forth and to some extent take notice of aspects that could bias their use in cross border studies such as cultural and historical factors influencing particular educational settings.

Rather than analyzing the system of indicators presented in earlier studies (e.g. DEMEUSE *et al.*, 2001) what is relevant for the purpose and scope of this article is a discussion of the conceptual grounds on which these indicators have been built. Most of the studies mentioned seem to agree with a particular understanding of equity, equality and equivalence which allows relating them to a system of principles guiding the construction of a system of indicators as presented by Meuret (2001). Based on a substantial analysis of earlier studies Meuret (2001) presents a set of principles to consider when attempting to draft indicators of equity which indeed show a shared notion with the positions of the social and cultural reproduction theory (e.g. BERNSTEIN, 1975; BOURDIEU & PASSERON, 1977).

According to Meuret (2001) the system of indicators must measure inequalities to help citizens and those who govern to judge the quality of the system, but it must also identify, «for the sake of those who govern», the opinions of citizens on the equity of the educational system and the criteria

that form the basis of those opinions. The relevance to considered the overall influence of the school is highlighted when arguing that indicators must measure not only inequalities in educational results (knowledge, school careers, social utility and academic degrees), but also the more immediate inequalities related to life in school and in the way students are treated by the institution and its agents. Flexibility is considered relevant, for the indicators must permit debate within the existing framework of diverse principles of justice, and not inscribe them in only one of them. Meuret (2001) also considers that the educational inequalities pertinent to most of the benefits distributed within the framework of the educational system can be regrouped into three large families: inequalities among categories, deviations among individuals; and the proportion of individuals falling below a minimum threshold. It is also considered as an essential principle in elaborating indicators to measure not only inequalities in educational results, but also inequalities at the source of the educational system that affect the teaching process itself. A system of indicator should also consider that among the benefits distributed by the educational process, priority must be given to those whose distribution is most important to individuals or for the democratic life of society.

Continuing the argumentation, another principle for a system of indicators is assumed to emerge from critically addressing the notion that «the search for equality is detrimental to other more important objectives» (MEURET, 2001: 144). Although modern theories of justice take seriously the challenge to equity posed by the concurrence of other values (e.g. CRIBB & GEWIRZT, 2003; GEWIRTZ, 2002; RAWLS, 1973; SEN, 1996) it is argued that among those categories pertaining to individuals, the most important are those considered totally «tightened to the human condition». The relationship between equity and the so-called opposing values may be more ambivalent and complex than mere rivalries; it is then important «to see how in the singular configuration of each country, educational equity and values that can support or thwart it evolves» (MEURET, 2001: 145). These arguments lead to another relevant principle, that is, indicators must permit discussion between the concern for equality and other values to which it may seem opposed. Finally and, again, identified with the narratives of social and cultural reproduction theory, indicators are expected to bear not only on educational inequalities, but also on the effects of those inequalities on social inequalities in general (MEURET, 2001: 147-148).

The importance of indicators in studies of equity, equality and equivalence cannot be underestimated, neither regarded as an unsurpassable obstacle in comparative studies. Hutmacher (2001) argues that there is not generally agreed-upon theory of education systems and educational equity and equality from which a coherent system of indicators could be derived. Any conceptual framework opens a field for the development of relevant indicators and at the same time delimits it. Openness in the conceptual discourse and a regard for the multifactorial character of equity, equality and equivalence, seems to be the most appropriate starting point for studies of national or cross-national scope.

III. SOCIAL AND CULTURAL REPRODUCTION THEORY - A PROPER BASIS FOR CROSS-NATIONALLY COMPARATIVE STUDIES?

Even though, as earlier presented, the question of indicators, its relevance and identification, remains an arena open for further inquiry, there is a certain agreement in earlier studies that in proceeding with studies of equity, equality and equivalence, particularly across borders, there is a need to have a pluralistic approach where different narratives could coexist (e.g. COLEMAN, 1990; FOSTER *et al.*, 1996). In relation to this need Benadusi (2001: 55) argues that the descriptive and analytical work of sociologist should involve, for instance, «all those concepts of equity in education that appear reasonable and significant in our societies, although more or less so, depending on the different contexts». There is then a need to be pluralistic not only in the normative assumptions but also in the data collection. In a critical review of sociological research and thought concerning equity specific traits of different theoretical approaches and research lines are identified in relation to (a) the discourse on the normative of equity in education, (b) the analysis of the main sources of inequity in contemporary society, (c) the detectable or foreseeable trend in the development of the displayed inequities and finally (d) the most relevant indicators that can be deduced from the analysis of the earlier aspects (BENADUSI, 2001). Regardless of the differences in approaches concerning these four mentioned traits, the assumption that inequalities are produced by social factors and therefore can be removed through different social changes seems to underpin the different discourses.

The general acknowledgment in sociology of education of the decisive role of the environment, in its different dimensions, makes the arguments of social and cultural reproduction theory (e.g. BERNSTEIN, 1973; BOURDIEU & BOLTANSKI, 1978; BOURDIEU & PASSERON, 1977) to be a valuable theoretical basis for cross-national comparative studies on equity, equality and equivalence in education. If we assume, as Hutmacher does, that:

«Equality typically designates an equivalence between two or more terms, assessed on a scale of values or preference criteria. Inequality thus characterises a difference, a disparity or a gap in terms of advantage or disadvantage in material and/or symbolic resources, such as wealth, social recognition, prestige, authority, power and influence» (HUTMACHER, 2001: 7).

Embracing this approach, Bourdieu's (1997) classification of three major forms of capital (economic, cultural and social) can prove useful as theoretical framework and starting ground for cross-national studies on equity, equality and equivalence.

Bourdieu (1997) defines economic capital as the amount of material resources available to the individual. Considering these most obvious and familiar factors embodied in economic capital it might be argued that is possible to analyze in a comparative way equity, equality and equivalence in terms of access to goods useful to the educational activity; a similar argumentation could be used in relation to the other forms of capital. Cultural capital is defined by Bourdieu (1997) in three main forms: (a) the *embodied* form consisting of durable competencies and dispositions of mind and body—*habitus*— learned in the interaction with the social environment (e.g. family, community, school), (b) the *objectified* form of cultural goods (e.g. books, art works) and (c) the *institutionalised* form in terms such as academic credits and qualifications. Comparative studies can benefit from considering educational system as been «culturally not neutral» therefore, and in various extents, privileging specific cultural standards of human excellence of dominant social groups or classes. It is however important to move forward from this notion and consider the complexities arising from the interdependence of these forms cultural capital, as outlined by Hutmacher.

«Dispositions and attitudes (e.g. language and behaviour styles, work ethos, relationship to schools, knowledge and learning) which students have acquired in different family and community environments, are therefore

more or less akin to those valued at school and more or less rewarded. For schools always assess more that it teaches and the conversion of the embodied form of cultural capital into the institutionalised form depends not only on time and effort, but also on the distance between the culture valued at school and students' *habiti*» (HUTMACHER, 2001: 8).

Bourdieu (1997) considers social capital to be embodied in the networks of social relations among individuals and groups. The «volume» of this form of capital is assumed to depend on the size of the networks that the individual is able to mobilise and the «amount» of economic, cultural and social capital that these networks possess. An important dimension is here added by Coleman (cited in HUTMACHER, 2001: 9) when underlining the relevance of looking at the qualitative aspect of such networks. This qualitative dimension is to include, e.g. the role played by variables such as loyalty, solidarity, the quality of the social capital in the child environment, professional ethos of the teacher, and the diversity in the classroom. From this analysis emerges an issue relevant to comparative studies, that is the amount and quality of social capital in the environment of the students and its impact on equity, equality and equivalence.

The value of the various aspects embedded in the different forms of capital varies considerably in relation to different settings, from particular social and cultural characteristic to the specific environment of the educational institutions (BOURDIEU, 1997). In addition, Bourdieu (1997) also acknowledges the very dynamic and interdependent character of their relationship; as Humacher (2001: 9) says, «they are convertible into each other and can also compensate for each other»; it is their combination that finally counts.

In this particular matter, that is, identifying the most suitable theoretical framework, as in many others in comparative studies, the path is controversial and indeed far from single recipes. Attempts at analyzing equity, equality and equivalence in different educational contexts could possibly be done on theoretical grounds other than the one here argued for. Bourdieu's forms of capital, as well as other contributions from the social and cultural reproduction theory, opens, from our perspective, a full range of new strategies and allows the developing a more comprehensive model to be used in cross-national comparative studies.

IV. COMPARING CROSS-NATIONALLY TENETS AND CHALLENGES

The process of educational reforms and its implications for equity, equality and equivalence can benefit strongly from comparative studies. Earlier studies argue for the need of learning from each other and creating the necessary frameworks which may allow such a learning to take place (e.g. LEVIN, 1998, 2001; CROSSLEY & WATSON, 2003). Learning from each other, as Levin (1998) presents it, could also be considered as an important dimension in the process of learning from ourselves in studies with local and national scope. Among the different objectives for doing cross-national comparative studies the following have been identified:

- Comparing similarities and differences;
- Investigating taken-for-granted assumptions;
- Developing a deeper understanding of our own value systems and practices;
- Suggesting new perspectives. (PEPIN, 2004: 160).

Cross-national comparative research, according to Pepin (2004), can help to establish or sharpen the understanding of the country's uniqueness, and thereby gain an improved perspective of the problems of a particular society; it might also help to identify the essence of a particular phenomenon. This is of a special value for such a controversial subject as the studies of equity, equality and equivalence.

Acknowledging the relevance of comparative studies on these notions, the key issue is then the development of the necessary and comprehensive analytical framework to study this subject in cross-national and comparative way. In a recent article, Smith and Ngoma-Maema (2003: 348-349) analyse earlier studies to highlight the value of frameworks considering it as «simplified representation of some aspects of the real world», a way to understand and simplify complex arrays of elements and the relation among them. They argue that ideally, «comparative frameworks should be grounded both in theory and practice, facilitating analysis of all relevant aspect of the object in question», and may evolve into a model, which specifies the relationship

among a set of related concepts. In building such a framework they choose «to start with a number of relevant themes which can be refined progressively as experience permits»; this is indeed a tenet largely shared in our discussions and attempts to draw a framework for cross-national studies of equity, equality and equivalence (MORENO HERRERA & FRANCIÀ, 2004)³.

The development of an analytical framework for comparative studies in this subject is indeed a complex, but yet not an unsolvable problem. The complexity emerges from the implications of the different aspects that we have previously analyzed when dealing with conceptualization, and increases with the fact that notions of social justice and equity, equality and equivalence, could be perceived differently in different countries (DWORKIN, 2000). Even in cases where certain agreement on conceptualization does exist, the methodological path to deal with the problem might remarkably differ. If we consider as Warwick and Osherson (1973) does, that the core issue in comparative research design is equivalence, it is then essential in creating an analytical framework to start up by finding some form of equivalence, either conceptual, of measurement or linguistic (PEPIN, 2002, 2004). When analyzing the most suitable methodological platforms for cross-national studies of issues such as equity, equality and equivalence Pepin argues that:

«Whichever methodology is employed, using research strategies cross-nationally highlights problems of culture, language and communication, which infuse all aspects of the research. Cross-national studies have to grapple with language and communication problems intensively at the stage of formulating problems and defining the meaning of concepts and interpreting findings. The advantage of qualitative studies [...] lies in their in-built potential for establishing conceptual equivalence by their underpinning epistemology which has implications for the conduct of the research and the strategies used» (PEPIN, 2004: 164).

Though the need to define different forms of equivalence is generally admitted as a tenet in most of the literature on cross-national and comparative studies (e.g., ALEXANDER & BROADFOOT, 1999; SHORROCKS-TAY-

³ One of the aims of the earlier mentioned International Workshop was to discuss the extent to which the current discourse on equity, equality and equivalence in Swedish educational system relates to the one in other European countries, again in terms of conceptualization there was what we consider a general, explicit or implicit, agreement; the methodological discussion was however controversial and remained as a subject for further discussion.

LOR & JENKINS, 2000; WARWICK & OSHERSON, 1972) recent studies argue that seeking equivalence is not enough (PEPIN, 2004); in subjects such as equity, equality and equivalence comparing «like with like» might be controversial, if not impossible. Based on previous studies and her own empirical work, Pepin (2004: 164), suggests the advantage in studying «anomalies», that is «cases that do not compare with others —outliers— in order to define the boundaries» and thus helping our understanding of the phenomenon been scrutinized. In a line of discussion to some extent related to the arguments presented by Feyerabend (1993), the possibility of studying «anomalous» cases, defined as the «uneven» or «inconsistence» is considered to be beneficial in opposition to the technical rationality that has largely prevailed in research (PEPIN, 2004). Research should also proceed without «such a boxes» (as the ones created by the technical rationality) by «studying anomalies, whatever could have been the element of arbitrariness in their historic origins and, occasionally in their subsequent development» (PEPIN, 2004: 166). In a draft of initial questions to be answered when studying an anomaly Pepin argues that:

«A comparative research design considering anomalous cases is likely to give “color” to the understanding of each cultural context, that is that anomalies should be firstly considered “intra-culturally”. As a second step it can be valuable to compare those anomalous cases even cross-culturally, although caution should be used here with respect to the theory inferred from that» (PEPIN, 2004: 166).

Considering these two perspectives, that is, (a) the tenet that assumes equivalence as core issue in comparative research design and, (b) the convenience to study anomalies, cases that do not compare with others; the question to discuss further is which of these alternatives, or their combinations, could be more useful to cross-national comparative studies. None of the two methodological approaches is contested here; both acknowledges the need to deal intensively from the very stage of identifying the problem with issue of language, conceptualization and ways of interpreting the findings, which we also consider essential in any attempt of study with cross-national scope.

In a recent article Gewirtz makes an attempt to provide a method, or analytical lens, to consider and evaluate claims about equity in education; this method involves:

- a) Looking at the multi-dimensional nature of equity.
- b) Looking at the tensions between different dimensions of equity.
- c) Being sensitive to the mediated nature of equity practices.
- d) Being sensitive to differences in the contexts and levels within which equity is enacted (GEWIRTZ, 2004a: 27).

According to Gewirtz (2004a: 27) what counts as equity in education cannot be divorced from judgments about «what is possible». There is a need to consider in particular, the extent and ways in which different histories, social and cultural configurations and different sets of constraints means that «different equity dimensions are relatively fore-grounded —or alternatively neglected— within different national contexts». It is also needed to consider how these different histories, configurations and constraints contribute to contrasting patterns of success. Gewirtz (2004a) also alerts us to the danger of moving from a position which takes differences in the contexts of enactment seriously to an extreme form of relativism which rejects the possibility or desirability of any fixed normative positions. I have argued, in addition, that cross-national and comparative studies on equity, equality and equivalence need of a socio-political and historical-evolutional perspective where the specific contextual discourses will be taken into consideration and examined (MORENO HERRERA, 2004). Finally, these kinds of studies will be highly benefited from taking particular notice of what, for the case of equivalence, Englund (2004) calls a «performative» character associated with a displacement of one of these concepts by the other as a response to shifts in political discourses and educational policies.

V. CONCLUSIONS

This article began by analyzing the controversies and challenges in conceptualizing equity, equality and equivalence; though this was acknowledged to be a tremendous undertaking it was not regarded as insuperable. Cross-national comparative studies indeed demand a sound conceptualization as a preliminary condition in the design of a proper analytical framework.

The controversies on conceptualizing are better understood if we consider specific dimensions of these categories and its implications for edu-

cation. *Equity*, on the one hand, gets considerably problematical when issues of horizontal equity, i.e., treating similar individual similarly, and vertical equity, i.e., distribution according to differences in relevant circumstances (CALHOUN, 2002) are discussed in the educational context. *Equality*, on the other hand, has been largely regarded as one of the pillars of the enlightenment, social thought and focus of a long tradition of debate and struggle among competing visions of government and social justice (CALHOUN, 2002). Finally, the earlier attributed «performative» character of the concept *equivalence* (ENGLUND, 2004), makes necessary a historical review of normatives and discourses in order to clarify its current meaning even within national borders. Despite this complex array of dimensions, conceptualization could benefit remarkably from a certain agreement on theoretical approaches. From the different contributions of sociological research considered relevant to this discussion (BENADUSI, 2001), the social and cultural reproduction theory as developed by Bourdieu and others (BERNSTEIN, 1973; BOURDIEU & BOLTANSKI, 1978; BOURDIEU & PASSERON, 1977) is here considered to provide a comprehensive path for setting an analytical framework for cross-national and comparative studies.

The theoretical contributions from the social and cultural reproduction theory could also, to a great extent, facilitate the design of a cross-national shared approach to another controversial issue: that of indicators. Though one might agree with the arguments that indicators will provide the needed accountability to analysis of equity, equality and equivalence and lead us to a more sounded discussion across-border (e.g. DEMEUSE, 2004; MEURET, 2001), a strong concern arises in relation to the principles upon which these indicators will be formulated; indicators could, by no means, derive from framing a particular problem to fit into specific research traditions and pre-conceived models of enquiry. Nor should they derive from existing «pressures» in the context and the impact that these different kinds of pressures might have in research design (GEWIRTZ, 2004b). Indicators will be part of an analytical framework for cross-national and comparative studies depending to a great extent, among other aspects, on an agreement concerning the theoretical ground of the analysis. Last, but definitely not least, it is essential to have a plural approach to methodology in which the tenet of equivalence and comparing «like with like» does not act in detriment of other methodological

alternatives (e.g., considering anomalies) which could also shade light in the complex endeavor of cross-national studies of equity, equality and equivalence.

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RESUMEN

Equidad, igualdad y equivalencia en los sistemas educativos es en la actualidad un tema de interés para la comunidad académica en diferentes contextos. El diseño de políticas educativas en diferentes marcos nacionales presta atención a exigencias políticas y sociales estrechamente vinculadas a diferentes conceptos de justicia social. La conceptualización y la realización de estudios empíricos se hacen controversiales debido a la diversidad de aspectos en los cuales se sustenta el discurso en relación con estas tres categorías. La investigación comparativa necesita sin embargo de un claro marco conceptual y metodológico para poder operar. Este artículo argumenta que el actual debate de aspectos conceptuales y metodológicos puede beneficiarse considerablemente de contribuciones como la teoría de reproducción cultural y de un enfoque metodológico más plural a los estudios comparativos. El artículo no pretende dar respuesta a las problemáticas que aborda; su propósito fundamental es contribuir al debate actual en estudios de comparativos de equidad en educación y resaltar algunos de los desafíos más importantes para estudios comparativos sobre esta temática.

PALABRAS CLAVE: Equidad. Igualdad. Equivalencia.

ABSTRACT

Issues of equity, equality and equivalence are currently a cross-national concern; policy making in education takes importance notice of social and political demands largely associated to different notions of social justice. Conceptualization and empirical studies remains, nevertheless, a controversial endeavour due to the variety of aspects underpinning the discourses on

these categories. Cross-national comparative studies however, need a well-defined conceptual and methodological framework. In this article it is argued that the current debate on conceptual and methodological issues could benefit from the contributions of social and cultural reproduction theory and a pluralistic methodological approach to comparative studies. The article contains no answers but perspectives on the various questions and challenges; the purpose of this article is to make an initial contribution to the ongoing debate on conceptualization of these categories and to highlight some of the challenges of cross-national comparative studies in this subject.

KEY WORDS: Equity. Equality. Equivalence.