



**UiT** The Arctic University of Norway

Department of social science

## **Spatial inequalities in education in Northern Norway**

Exploring rural-urban differences in teacher's work experiences

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A dissertation for the degree of Philosophiae Doctor – December 2020





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By

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UiT the Arctic University of Norway

Faculty of Humanities, Social Sciences and Education

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## Summary

The focus of this thesis, *Spatial inequalities in education in Northern Norway - Exploring rural-urban differences in teacher's work experiences*, is on teachers' work experiences in different geographic contexts in Norway. It explores the constraints and enablements that teachers may experience due to unequal structural conditions for education. The theoretical framework is based on critical realism and Margaret Archer's morphogenetic approach as well as discussions of centralised versus decentralised educational systems. The data material is based on participant observation in a rural case municipality and qualitative interviews of teachers in both a rural and an urban case municipality in 2018.

This thesis categorises the structural properties that constrain and enable especially rural teachers into five categories: (1) *the centralised education system*, (2) *rural demography*, (3) *resource distribution among rural and urban schools*, (4) *local opportunity structures*, and (5) *spatially unaware curriculum and educational policy*. The thesis shows that a centralised educational system with a centralised funding system of education, together with other structural properties like rural demography, create unequal conditions for teaching based on geography, with rural areas as the losing part vis-à-vis urban areas. The analysis is also suggesting how these conditions may be changed in order to achieve more equal conditions in education.





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# 1 Introduction

The title of this thesis, *Spatial inequalities in education in Northern Norway – Exploring rural-urban differences in teachers’ work experiences*, is my two-sentence answer to a question that family, friends, colleagues, and others often ask researchers: ‘What is your research about?’ Education, spatial inequality, and especially rural injustice are subjects that are close to me. Like many rural researchers, I grew up in a small rural village, which in my case is on the small end of a picturesque fjord on the west coast of Norway, with approximately 3–400 inhabitants; the number slowly and steadily decreasing. I find myself in a slightly ironic position; while I am concerned with rural education and depopulation, I am also among the many who moved away and never returned. My own experiences from my formative years as a child growing up in a rural area and ‘learning to leave’ to receive an education, my relatively short career as a teacher, and now as a researcher with an interest in education, has substantiated the necessity not only for good teachers, but also for spatially just conditions for education. I was motivated to write this thesis for several reasons. Not only is knowledge for its own sake an important part of the scientific project, but the thesis also exists because it matters to me, and because others might use it to navigate and change parts of education for the better.

I have been very privileged to write this PhD thesis as a part of the project *RUR-ED Spatial Inequalities and Spatial Justice in Education* at UiT, the University of Tromsø. This project is a sociological case-study on five municipalities in Northern Norway, as well as municipalities in Finland and Canada. The aim of RUR-ED is to contribute towards ensuring a spatially just educational system, a goal that is reflected in this thesis as well. The research project as a whole utilizes a wide array of methods, whereas my contribution focuses on teachers and their work experiences. I have collected this information through qualitative methods, specifically participant observation and semi-structured qualitative interviews within two of the case municipalities.

This introduction continues with the aim and overarching research questions, a short introduction of the Norwegian education system, and an introduction of the case municipalities. The structure of the thesis as a whole is outlined at the end.

## 1.1 Aim and overarching research questions

The point of departure for this thesis and the overarching research questions involve the existence of spatial inequalities in education, with a specific focus on rural inequality in education in a (Northern) Norwegian context. The claim of inequality is substantiated by research. In Northern Norway, the area of the country with the lowest

population density, students score lower on measures of educational outcomes than elsewhere in Norway in terms of dropout rates from upper-secondary school (Falch and Nyhus, 2009; Markussen et al., 2012; Vibe et al., 2012; SSB, 2019a) and Grade 10 national tests and exams (Bæck, 2019). It has also been generally assumed that larger urban schools are of higher quality than rural schools (Hargreaves et al., 2009), although this superiority of urban schools are disputed (Solstad and Thelin, 2006; Solstad, 2009; Åberg-Bengtsson, 2009; Beach et al., 2018). All these themes are presented and discussed further in a separate chapter on previous research. The focus in this thesis is on teachers' work experiences, and the main research questions for my thesis are as follows:

- (1) What are the work experiences, constraints and enablements that teachers experience in different spatial contexts, and are there spatial inequalities?
- (2) Are the structural properties that constrain and enable teachers (and students) in rural areas in a state of change or reproduction?
- (3) How can these structural properties be changed for a more spatially just education system?

The first research question is mostly empirical in nature, and the answer is mostly presented in the research articles in this thesis. The second research question is partly addressed in the independent articles, and it forms the main research question for this thesis summary. The last research question is also partly answered by the independent articles, but is further elaborated upon in the final stages of the analysis. The research questions focus on teachers, but the focus on students is implicit, as the two are in a complementary relationship; one ceases to exist without the other. One of the articles included is also specifically about students, taking the focus on structure even further, as some of the structures that constrain teachers also constrain students to a certain degree, and a change in perspective broadens the understanding of structural conditions in education based on place of residence.

The research questions posit that the current status quo in terms of spatial inequality in education – especially in rural education – can be best understood with reference to context and social structures, although the importance of culture and agency should not be underestimated or overlooked. People in any society are born and raised in a context not of their own choosing, and this very fact conditions them to a certain degree (Archer, 1995: 187, 201ff). It does not determine the person, but it determines the positions and the situations that individuals or collectivities face by distributing punishment or rewards for certain courses of action. Examples of such positions include: social class, access to resources, ethnicity, gender and place of birth. One of the most formative institutions for a person is education; the degree of education is

often associated with life chances in general. The fact that children spend significant amounts of time in education (in Norway, at least from age six to 18–19 if taking a vocational track and from six to 22 or over if choosing an academic track) before entering the work force underlines the importance of education for individuals. It should therefore be obvious that education is highly structured; not only is it a major institution affecting people's lives, but it is also an institution which is closely related to the rest of society, and this 'the rest of society' has an interest in what education the population is getting. It is clear then, that people do not get to decide whether to enter school or not, and students do not decide what kind of education they receive, at least until one reaches a certain level. While the individual makes his/her choices based on his/her concerns, this infrastructure is persuasive; one chooses one trajectory over the other, but whichever one chooses, one is still choosing a pre-made track in a differentiated infrastructure of choices. Teachers are also not completely free; they cannot simply choose to teach what they themselves decide to be the most adequate, as this is also predetermined to a certain degree by institutional structures.

What we can make of this is the existence of a pre-existing structure that both teachers and students are navigating their way within. Opting out is a possibility, but one with a significant risk attached to it; this decreases one's chances of obtaining certain livelihoods. Education, then, is structured, and the investigation of this structure makes sense not only for the sake of the scientific enquiry of knowledge itself, but also in terms of improving upon the current state of affairs. This structural outlook does not completely rob people of their own free will; teachers may teach well or not so well, and many important lessons that are not in any curriculum are passed on from teachers to students (and the other way around). Students can also be good or poor navigators in their own educational trajectory; reflexive deliberation between one's own concern and how this fits the context – such as the current or future labour market – can be done well or not so well, and there may be many trajectories that can lead to what one considers a good life. The logical extension of acknowledging a pre-existing educational structure is to find out what this structure is and what it does to those who have to encounter it involuntarily.

## **1.2 An overview of the Norwegian education system**

Below is a short introduction of the Norwegian education system in 2020. This introduction is akin to an organizational chart of the institutions that make up the Norwegian education system and a flow chart over different student education trajectories and teacher education. In Norway, the political parties of the government and the parliament decide the educational policy. This policy is then carried out by the Ministry of Education and Research, which is responsible for all levels of education,

and the Norwegian Directorate for Education and Training, which is responsible for elementary and secondary education. The national curriculum for primary and secondary education and training is managed through the Norwegian Directorate for Education and Training, with a *core curriculum* describing the fundamental values, cultural elements, and learning objectives, as well as a *subject-specific curriculum* containing competence aims for students' learning. According to the Norwegian Education Act, governance of the education system is divided into three levels. Municipalities are responsible for compulsory education – that is, primary and lower-secondary schools; county authorities are responsible for upper-secondary education; and the state is responsible for higher education (Kunnskapsdepartementet, 2019). Note that public education in Norway is free.

Students enrol in the first grade of primary school at six years of age, staying in primary school until they enter lower secondary when they turn 13. A major difference is the introduction of grading, the basis of their application for upper secondary, which the students normally attend from 16 years of age onwards. Elementary and lower-secondary education is mostly unified in its design, allowing some elective or optional subjects at the lower-secondary level. These are often immersive studies in a subject that the student is already taking or a foreign language class. Upper-secondary education is differentiated into two broad categories: (1) a three-year academic track and (2) a two- to three-year vocational track with a two-year apprenticeship. Some vocational tracks also contain the minimum subject requirements to qualify for higher education, and there is a possibility to take a one-year course after two years in a vocational track if one wants to attend higher education. Some vocational tracks qualify directly for subject-specific higher education, e.g. a certified electrician may apply for direct entry into a bachelor's programme in electrical engineering in some places. The three-year academic track and the vocational track exceptions mentioned above then qualify students for higher education at a technical institute, university college, or university (Kunnskapsdepartementet, 2019).

Teacher education in Norway is a part of higher education at university college or university, and there are currently two common ways to obtain a teaching certification for primary or secondary education in the country. The first is to enter a five-year professional master programme to become a teacher, with a specialisation in subjects and didactics relevant to a certain age group; supervised teaching placement or practice is spread out over the course of the programme. The second is to obtain a master's degree or higher in a relevant subject and a certain number of credits normally equivalent to one year of study in a second relevant subject, as well as attend a one-year course in pedagogy that also includes teaching placement.

### 1.3 A short introduction to the case municipalities

This thesis focuses on two case municipalities in Northern Norway. The choice of region is not coincidental; the author resides in Northern Norway, and the case municipalities represent some specific aspects unique to the region, as revealed in the articles and analyses. The significant presence of the Sami indigenous people and the Kven ethnic minority, as well as a history of assimilation, is one interesting aspect in the context of education. In addition, the large geographical distances and lower population density found in Northern Norway, as well as its existence outside the geographical centre of power found in the significantly more densely populated southern regions, makes for an interesting case to enquire into spatial inequalities in education. I have chosen not to disclose the actual location of the rural case municipality, so as to keep the identity of the teachers and students who have participated in the research project safe, as promised to both them and the national ethics board NSD. I have chosen to disclose the name of the urban case municipality while keeping the identity of the school, its teachers, and its students confidential.

The rural case municipality, here referred to as the municipality of *Grønnvik*, is one of the largest municipalities in Norway in terms of land area. Its natural scenery with dramatic mountains, rivers, valleys, fjords with a rich flora and fauna is appreciated by the local community. It has a population of approximately 5000 people. The municipality centre is a couple of hours' drive away from any significantly larger city. Half of the population reside in or close to the municipality centre, while the rest reside in smaller communities scattered around the municipality. The largest employer is the public sector, especially the health sector. The case municipality has several public elementary schools and only one public lower-secondary school. There is also a local upper-secondary school and a private school sector in the municipality. Most of the teachers working in Grønnvik are from the case municipality or a neighbouring one.

A significant part of the population in this case municipality self-identifies as Sami and/or Kven, as well as Norwegian. The Sami are an indigenous group primarily situated in the northern parts of Norway, Sweden, Finland, and Russia. The Kven are an ethnic minority who emigrated to Norway from the 1700s onwards from Tornedalen, on the borders between what is known today as Sweden and Finland. The Sami and Kven were subjected to a process of assimilation by the Norwegian state, according to the official policy between 1850 and 1950. The educational sector played an important role in the assimilation process, as Sami and Kven languages were outlawed in schools, and all teaching was to be conducted in Norwegian, a language that children with Sami or Kven backgrounds were not proficient in. Children were

taken out of their home communities and put into dormitories at school, experiencing bullying and violence at times (Nergård and Mathiesen, 1994; Minde, 2003; Jensen, 2005; Keskitalo et al., 2013; Ngai et al., 2015; Niemi, 2017). The ethnic aspects above are an important part of the historical context of this case municipality, and they are discussed in Article 1 and to some degree in the analysis.

The urban case municipality is Tromsø. It is one of the largest cities in Northern Norway, but it also contains areas that are of a more rural nature. The vast majority of the over 70 000 inhabitants reside in the city. The city functions as a regional centre, and central institutions there include a large hospital, a university, a county administration, and a significant private sector. The majority of the population is employed in the public sector. There are many public elementary and lower-secondary schools of various sizes in the municipality. There are also several upper-secondary schools and some private schools. Some of the teachers in Tromsø are from the municipality, but some are from other parts of the country. The University of Tromsø also offers teacher education.

#### **1.4 Outline of the thesis**

This PhD thesis is article-based as opposed to the classical monograph. It consists of two complementary parts: this *thesis summary*<sup>1</sup> (Norwegian: *kappe*) and *four separate research articles*. A thesis summary situates separate articles together in a broader research context, further develops the theoretical points of departure, elaborates the methods of data collection for the thesis as a whole, summarizes the results, and analyses and discusses its main contributions. The next chapter delves further into previous research, situating the thesis within several research fields that have influenced this study. Chapter 3 presents the theoretical framework for the analysis in the thesis, while Chapter 4 elaborates and discusses the choices made in terms of methods and ethics. Chapter 5 summarizes the findings of Articles 1–4. Lastly, Chapter 6 consists of an analysis of the articles in the light of the theoretical framework; it also discusses the contribution of this thesis, finishing off with policy implications and ending remarks. The research articles and an appendix are attached at the end of the thesis.

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<sup>1</sup> 'Thesis summary' is interchangeable with other terms such as 'comprehensive summary', 'extended summary', and 'cover article'.

## 2 Previous research

This chapter reviews some of the most relevant theoretical themes of the thesis and concludes with a discussion of where this thesis fits in. The thesis is situated within the sociology of education, but it also draws from comparative pedagogy and, to some degree, the anthropology of education. It takes a position congruent with Bæck (2016), who argues that, while rural-urban differences are well documented, rural education is not well researched. This chapter starts with a brief review of relevant research, before revisiting the claim for the need to focus on rural education and contextualization of educational research as a whole (Bæck, 2016)

The importance of place in education studies has seen increasing recognition since the turn of the century, for instance in Gulson and Symes (2007); Farrugia (2015). However, within education research, place has often been a variant of the urban setting and therefore metrocentric (Hargreaves et al., 2009; Farrugia, 2014; Bæck, 2016; Paulgaard, 2017; Beach et al., 2019). This chapter briefly outlines previous research on spatial inequality in education, specifically on inequalities tied to rural-urban differences. Inequalities exist on several levels, from the micro level of the student up to the macro level of educational policies and globalized education. The chapter then discusses the research on rural-urban differences in Norway, followed by the conceptualisation of rural and the relevance of this thesis, in view of the general lack of context and rurality in education research.

### 2.1.1 Spatial inequalities in education

At the turn of the 21<sup>st</sup> century, a growing interest in spatial inequalities emerged across social science, for instance Massey (2005); Soja (2010). Opportunity is unequally distributed across different geographies according to Soja (2010), building on Lefebvre's work among others. Following Soja, geography can intensify and sustain worker exploitation and support oppressive forms of cultural and political domination. Locational discrimination created through the biases in and on certain populations not only produces but also reproduces spatial injustice and lasting spatial structures of opportunity (Soja, 2009). Soja aims to pursue spatial justice not only in a legal sense, but also in terms of social, economic, and political justice (Soja, 2010). He highlights that spatial injustice can exist in both the process and in the outcome; while relatively easy to descriptively uncover, it is difficult to identify and understand the underlying processes producing unjust geographies (Soja, 2009).

Schools and education are not politically neutral, and arguments that education systems perpetuate inequality and give preference to certain segments of the population over others – such as a preference for the middle or higher social classes –

are well-known e.g. Willis (1977); Bourdieu (2006). The spatial ‘turn’ has resulted in an emergence of spatial inequalities in education research as well, e.g. Gulson and Symes (2007); White and Corbett (2014); Farrugia (2015); Bæck (2016). This increased emphasis on place and context in educational research is necessary to adequately address and discuss educational attainment (Schmitt-Wilson et al., 2018) and institutional practices in schools and classrooms (Gruenewald, 2003). Although a significant part of the research on space focuses on urban inequalities (Soja, 2009; 2010), this thesis and chapter give priority to rural-urban differences.

There exists a significant body of literature on rural-urban differences documenting and discussing student marginalization, different student attainments, and educational opportunities based on place of residency, with rural students faring more poorly than their urban counterparts. A quick glance at the academic literature exposes this as a global problem existing in but not exclusive to Canada (Corbett, 2007); Australia (Green, 2013; Sutton et al., 2017); Russia (Amini and Nivorozhkin, 2015); Spain (Hernández-Torrano, 2018); the US (Hung et al., 2020); and the Nordic countries such as Sweden (Åberg-Bengtsson, 2009), Finland (Autti and Hyry-Beihammer, 2014), and Norway (Solstad and Thelin, 2006; Bæck, 2019). The spatial inequalities in student attainment are explained in several ways, and the explanations often intersect, or are at least compatible and non-mutually exclusive.

If one takes a historical look, different explanations of why some groups of students have done less well in education than others have dominated at different times. Explanations based on social Darwinism and racial essentialism was long in the rage; they postulate that certain races have lower overall ability than others and therefore need guidance through education for their own best interest. This colonial mindset certainly played a part in both colonial and assimilation policies in the 19<sup>th</sup> and 20<sup>th</sup> centuries (Hays, 2016), and the consequences of such often blatantly racist policies can still be observed today among affected groups such as ethnic minorities.

These explanations were largely abandoned post WWII in favour of cultural explanations. Two subcategories emerged: *cultural deficit* and *cultural discontinuities*. *Cultural deficit* is often associated with theories on the ‘culture of poverty’ by authors such as Oscar Lewis (Hays, 2016). While an improvement over earlier explanations, it places the problem outside the education system and into the home lives and cultures of the students. Characteristics such as lower ability, low cultural emphasis on education, and poor work ethic reveal the strong biases in this type of theories. While these characteristics are discriminatory and later shown to be wrong, Hays argues that these kinds of explanations have not disappeared from the public discourse (Hays, 2016). This does not mean that cultural differences cannot impact education; the



culture advanced in education is often associated with a more powerful group, and the difference between the two does not only represent a *cultural discontinuity* but also a power gap. While Hays uses indigenous education in Africa to illustrate the point, such cultural explanations have also been present in Norway (Edvardsen, 1996). A focus on a macro-level approach to structural inequality emerged as a reaction to the explanations based on cultural discontinuity, as cultural explanations were criticized for their lack of attention to historically produced social structural conditions and structural barriers, including class, gender, and spatial differences.

One of the most prevalent explanations of student attainment levels irrespective of spatial background is family background, often operationalized as the social class or socioeconomic status of the parents (Willis, 1977; Bourdieu, 2006). Explanations based on parental background are often brought in to help explain uneven geographic educational attainment, e.g. Bakken and Seippel (2012); Owens (2018). One common set of explanations is that the student's parents and academic socialisation within the family strongly impact his/her attainment, and since parental background is distributed unevenly in terms of geography, student attainment differs accordingly, as parents with higher education are more involved in their children's education (Bæck, 2017). An aggregation of parents with higher education can also function as pressure groups influencing the school's focus on quality (Bæck, 2016).

Social class or socioeconomic status often intersects with other factors such as race/ethnicity as well (Coleman, 2019). While intersectionality is often tied to gender, the general idea of interconnectedness among social categories can be further expanded and applied. Some ethnicities fare more poorly in the educational system than others, and while certain ethnicities are in a privileged position and other exist in a relatively equal coexistence, many of these who fare more poorly are ethnic minorities and/or indigenous peoples who are treated negatively by the majority, often through the state apparatus. Many of these groups are not only in an under-privileged socioeconomic situation, but they often live in rural areas as well, and thus social class or socioeconomic status intersect with geography/spatial inequality and ethnicity in complex ways. This is partly exemplified and discussed within a Norwegian context later in this chapter and in Article 1.

Another explanation of the differences in student attainment and dropout rates is variation in available opportunities or opportunity structures based on place of residency (Bæck, 2016; 2019). Access to upper-secondary and higher education is more limited for youth living in rural areas due to factors such as geographical distance and isolation, lack of support, and increased cost of living associated with moving out of their family homes. There is also often a dissonance between the

concerns and agendas of these youths, the openings in the local labour market, and the availability and options in upper-secondary or higher education, often ending with rural depopulation of people in working age (Corbett, 2007; Tieken, 2016). This theme is discussed in Article 4 in the thesis, showing that opportunity structures constrain individual agency despite levels of reflexivity and reflexively developed educational concerns when youths attempt to choose their individual educational trajectories.

Educational policies also reflect spatial inequalities. Research shows that curricula are often developed without explicit spatial awareness or with an urban bias; they therefore may contribute to spatial inequalities in educational attainments (Gruenewald, 2003; Roberts, 2013; Roberts and Green, 2013; Bæck, 2016; Roberts, 2017; Solstad and Andrews, 2020). Tieken argues that this is the result of a decade-long push towards ‘one best system’ which has favoured urban over rural since industrialization (Tieken, 2014). This metrocentric bias in the curriculum is discussed specifically in Article 2, which tackles some structural and contextual constraints and enablements in the creation and enactment of local content.

Funding systems are another set of policy instruments that impact rural schools differentially across educational systems. Funding is often tightly tied to the local tax payer base, and rural depopulation of people of working age impacts both these factors, as well as the size of the school catchment areas (number of potential students) (Johansen, 2009). Rural depopulation and the falling tax income that comes with it, in combination with an increasing emphasis on fiscal responsibility and performance-based accountability, are problematic for the economic situation of rural schools, as overhead costs per student are higher there than in urban areas, e.g. Biddle and Azano (2016). What follows are not only problems of insufficient funding, but also school closures or consolidations, impacting opportunity structures and place attraction for immigration. Out-migration in rural communities is then essentially caused by and further exacerbating economic problems (Stelmach, 2011). According to Tieken, school closures are a question of spatial injustice, as they hit unevenly and mostly in poorer areas, and, in the context of the US, in areas of colour as well. While often thought of as a rural issue, closures are also increasingly relevant to urban schools as context-dependent manifestations of the same reform strategy (Tieken and Auldridge-Reveles, 2019). Arguments used for school closures are cost efficiency, academic performance, and equality (Ibid.), although the promised savings do not always pay off (Svendsen, 2018). Similar rationales are used in a Nordic context, e.g. Solstad and Thelin (2006); Solstad (2009); Autti and Hyry-Beihammer (2014), where similar dynamics take place. The economy of rural schools and school closures are addressed in Articles 1 through 3 and revisited later in the theory chapter and analysis.

Relevant to both student educational attainment and the rural school economic situation is the rural teacher. The teacher is situated between students, their parents, the local community, school leadership and school owners, and educational policy simultaneously and regardless of geographic location. The problem of attracting and retaining qualified teachers is a well-known issue for rural schools and school leaders in many places in the world as discussed in Stelmach (2011), and it can be exacerbated by a nationwide lack of teachers, such as the projected increasing lack of teachers in Norway up towards 2040 (Fredriksen, 2018).

Other related issues are tied to rural demography and opportunity structures for teaching candidates and their families, as the local labour market and lack of access to services may discourage them from moving to a rural area, choosing urban knowledge cities instead, at least in a Norwegian context (Johansen, 2009; Stein and Buck, 2019). Moreover, rural teacher retention is in varying degrees tied to different kinds of support, such as principal support, financial support, and continued opportunities for professional development (Barnes, 2013; Pittman, 2015).

There are many examples of suggested and attempted solutions to the problems of recruitment and support of rural teachers. Some are tied to recruitment, such as improving teacher-preparation programs for student practicums (Azano and Stewart, 2016), dedicated rural practicums (Downes and Roberts, 2018; Mitchell et al., 2019), and specific courses that focus on rural living and teaching (Stelmach, 2011; Downes and Roberts, 2018). Others are more concerned with retention of rural teachers through support arrangements such as mentor plans for fresh rural teachers (Eldredge-Sandbo, 2018). Lastly, some solutions also include economic incentives, such as increased salaries in the US (Pittman, 2015), financial benefits or housing in Australia (Downes and Roberts, 2018), and student-loan reductions in Northern Norway (Lånekassen, 2020). Decentralised teacher education has also been a way to address the issue of recruiting and retaining teachers in rural Northern Norway (Skjelmo, 2007). Recruitment and retention of rural teachers are also relevant to Article 3, which summarizes several of the structural properties that cause issues for rural schools in Northern Norway compared to their urban counterparts.

A part of the spatial turn has also been to include the local communities in which the rural schools are situated into the analysis. The relationship between the local community and its school is often important for understanding rural schools as a research object in itself, as well as how the combination of the two meets national educational policy requirements (Tieken, 2014). An example of the relationship and dynamic between the local community and its school on one hand, and national policy on the other, is the *cultural discontinuity* between a metrocentric educational system

and rural communities, e.g. Edvardsen (1996). The inclusion of the local community with its specific and unique contingencies and history is of great importance when discussing spatial inequality in education. This is not only illustrated in the existing body of literature, but also in Article 1 of this thesis. In this article, I argue that current issues in a specific rural case community must be understood in light of the specific historical context of the case municipality, in conjunction with various aspects of the national educational policy.

### **2.1.2 Conceptualizing ‘rural’**

There is no current consensus on what defines *rural*. Tieken identifies two broad, contradictory categories of stereotypes regarding this term found not only in popular culture and mainstream media but also sometimes even creeping into research and reform. The first category characterises rural in terms of deprivation and decline, backwoods and backwards (Tieken, 2014). This is further elaborated by White and Corbett, who argue that the rural is often conceived as deficient rather than different from its urban counterpart – i.e. outside the conceptual boundaries of modernity, the geographical boundary of the city, and the temporal boundaries of a world migrating out of the country and into the metropolis (White and Corbett, 2014). The second category claims the opposite, painting a romantic and nostalgic picture of the uncomplicated simplicity of some sort of a golden age. While kinder than the other category, Tieken argues that the latter is no more realistic (Tieken, 2014). Although the picture in the latter category is more akin to Thoreau’s *Walden* than Boorman’s *Deliverance*, they both fall outside the boundaries of modernity and cities, as well as the migration from the rural towards the urban as characterized by White and Corbett (2014).

The lack of consensus on what defines the rural is also found in the literature (Coladarci, 2007; Hargreaves et al., 2009). Following Stelmach (2011), some definitions are largely based on functional terms from geography, land use, population, population density, behavioural qualities of living, and/or distance to an urban centre (e.g. SSB, 2019b). Others are tied to political-economic concepts and how rural is positioned in terms of social production or social constructions of rurality (Stelmach, 2011). Lastly, some definitions also define rural not by its geographical boundaries, but by the meanings inherent in rural lives wherever lived, as the rural lifeworld constituted by interactions and events tied to place (Hargreaves et al., 2009; Tieken, 2014). They argue that the diversity of what can be categorized as rural is obscured when strictly adhering to statistical definitions. Rural often appears alongside urban as a rural-urban dichotomy, gap, or continuum (Hernández-Torrano, 2018), and sometimes other concepts such as centre-periphery and relative distance to centres of

power are also evoked in discussing the meaning of the word (Rokkan and Urwin, 1983; Stein et al., 2019; Almås and Fuglestad, 2020). However, distinguishing between rural and urban is in no way easy and straightforward, at least as a binary, as both terms have been constructed and contested (Roberts and Green, 2013; White and Corbett, 2014; Bæck, 2016)

Nonetheless, most definitions rely on some sort of geographical typology. There is no consensus, however, between countries (Stelmach, 2011), and different institutions and organizations within a country may even have varied definitions, putting communities in the category of ‘sometimes rural, sometimes not’ (Tieken, 2014). What this shows is the elusiveness of rural as a concept. The lack of consensus makes comparison, transferability, and discourse problematic, as differing definitions yield different results, possibly affecting policy design (Stelmach, 2011). This discussion is resumed in the method chapter with the presentation of the case municipalities.

### **2.1.3 Research on rural-urban differences in Norway**

The interest in rural education has existed for quite some time in Norway. An early example is the Lofoten project, a Norwegian research project conducted in the late 1970s with an interest in smaller rural communities and their education. It was named after the geographical area of Lofoten, where it was carried out. The aim of the project was to improve and adapt education to local conditions (Eilertsen and Solstad, 1980; Høgmo et al., 1981). The two most prominent researchers on rural education in the 1990s and 2000s were Karl Jan Solstad and Rune Kvalsund. Solstad argues that the county and municipality funding system introduced in 1986 (NIS-86) worsened the economic situation in poorer municipalities and counties. The NIS-86, together with the 1992 municipality reform which gave municipalities and counties more autonomy over their own school structures, led to school closures; this argument is revisited several times in this thesis (Solstad and Thelin, 2006; Solstad, 2009).

Kvalsund proposes a methodological critique, arguing that much of educational research is single-case in an urban setting, often limited to the inside of the classroom. At the time of writing, Kvalsund argued for a need for contextual detail and new, large multiple case studies (Kvalsund, 2009). Since 2009, several studies have addressed rural issues and rural-urban differences in education in Norway. Regional differences in Norwegian education are well-documented; students from rural areas perform more poorly on scores for student attainment than their urban counterparts in terms of national test scores in mathematics, reading, and English in the eighth grade and on the national exams in the 10<sup>th</sup> grade, the latter being part of the foundation for admission into upper-secondary education (Bæck, 2019). Regional differences are also visible in rural Northern Norway, where students score significantly lower on several measures

of educational outcomes than elsewhere in Norway, especially dropout rates from upper secondary (Falch and Nyhus, 2009; Markussen et al., 2012; Vibe et al., 2012; SSB, 2019a). According to The Norwegian Directorate for Education and Training, schools in Troms and Finnmark county contribute less than average to students' national exam results in the 10<sup>th</sup> grade after adjusting for parental background (Utdanningsdirektoratet, 2020). Whether this means that rural schools are worse than urban ones are contested, and many argue that this is not the case (Solstad and Thelin, 2006; Hargreaves et al., 2009; Solstad, 2009; Åberg-Bengtsson, 2009).

The *Learning Regions Project* analysed differences between educational attainment levels in two Norwegian counties, developing a methodology for schools and municipalities to improve their attainment levels (Langfeldt, 2015). Researchers from the same project also argue that the interaction between school and place is a better intake than the split between internal (within) and external (outside) school factors for understanding why schools develop differently (Midtsundstad and Langfeldt, 2020). Relevant Norwegian research networks have been established, and special journal issues have been released on rural education, as *place* needs comparative attention in order to understand the differences in measures such as student attainment based on location (Reegård et al., 2019). Local opportunity structures, such as local school access and local labour markets, are important to understand rural-urban differences, as well as accessibility and choice options when students transfer from lower- to upper-secondary education (Bæck, 2019).

In addition, rural-urban comparisons show differences not only in local employment opportunities but also in local culture and understanding of education (Hegna and Reegård, 2019). School closures and consolidations often remain a rural challenge rooted in the framework conditions at the municipality level (Solstad and Andrews, 2020), and municipality administrators are often playing a surprisingly active role in such processes (Aasland and Sørholt, 2020). The emergence of rural education history has also been documented by Solstad (2020), who argues that various aspects of globalisation such as neo-liberalism, new public management, supra-national institutions and ICT-drive compression of space and time have impacted rural education provision since the 1980s.

Another phenomenon that intersects with rural education, especially in Northern Norway, is the ethnic assimilation of the Sami and the Kven, as these minority groups were often situated in what were and still are considered rural areas. The Sami are an indigenous people living in Norway, Sweden, Finland, and Russia, while the Kven are an ethnic minority who immigrated to Norway from the area of Tornedalen in Northern Sweden and Finland, especially from the 1700s onwards. The cultural/ethnic

assimilation of these groups was pursued as official policy by the Norwegian state between 1850 and 1950, partly as a reaction to expansionist tendencies on the part of Finland, partly due to Norwegian nation building, and partly as a component of foreign politics against an influx of communist ideas from what are now Finland and Russia (Jensen, 2005; Niemi, 2017). Sami and Kven languages were outlawed in school contexts, and children were taken out of their family homes and put into school dormitories. The language of instruction was Norwegian, a language they were not proficient in. Several authors have discussed the role of educational institutions in the assimilation of the Sami and its negative consequences, such as discrimination; bullying; violence; and loss of language, power, and identity (e.g. Nergård and Mathiesen, 1994; Minde, 2003; Lund et al., 2005; Keskitalo et al., 2013; Nergård, 2013). The ethnic assimilation and its impact on the rural case municipality is further discussed in Article 1.

#### **2.1.4 The lack of context and rurality in educational research**

This chapter began by claiming a need for context and place specificity, in particular more attention to rural places in education, since this is lacking in current educational research on inequality (Kvalsund, 2009; Bæck, 2016). To some extent, this lack has been corrected, as shown in the literature review above. Although superficial database searches can be considered an exercise in naïve empiricism, a quick search in the ERIC and Education research complete databases<sup>2</sup> shows that, in recent decades, attention to place and education has seen a steady increase in relevant literature (Education research complete, 2020; ERIC, 2020). More results were found from relevant search words since 2000 than in all the years up to 2000. Similar database searches and the literature review presented also show an increase of relevant results in a Norwegian context post-Kvalsund's literature review in 2009. However, the increase is miniscule in the larger context; the same database results suggest that the works presented in the literature review is only around 1% or less of the overall literature on education, both internationally and in a Norwegian context.

The opening claim of this chapter is further elaborated by Bæck, who argues that issues related to rural education have been given relatively little attention by educational authorities, despite close to 20% of the population living in rural areas; she points to the *Knowledge promotion reform* (LK06) as an example of attention to rural education (Bæck, 2016; SSB, 2019b). Solstad argues that the awareness of place and

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<sup>2</sup> Examples of relevant search words were: rural urban + differences, regional differences + education, rural schools OR rural education, education + spatial justice OR spatial injustice, education + spatial inequality OR spatial inequity, and Norwegian variations of the same search words.

rurality in national guidelines was present from the 1970s onwards but decreased with the introduction of LK06. This decreasing awareness has continued, with the new general part of the core curriculum containing overarching values and principles for primary and secondary education. Solstad argues that the decreasing awareness of space and rurality is a result of aspects of global neo-liberal policies as outlined in the next chapter (Solstad and Andrews, 2020).

This thesis places itself alongside the body of literature presented in the literature review as a part of the critique of the lack of focus on rural education and contextualisation in educational research. More specifically, it focuses on the teachers' work experiences and offers a structural outlook on rural-urban differences and inequalities in education.



### 3 Theoretical framework

This chapter presents some reflections on the philosophy of science, as well as the main theories used for analysis in this thesis. The previous chapter described an existing lack of focus on context and structure in education research (Bæck, 2016). This thesis attempts to address this lack of attention, advancing an analysis that takes context and structure into account in education research. This is done by addressing rural-urban differences in themselves and by choosing adequate theories for the analysis.

The chapter starts with a brief introduction to critical realism, often associated with the philosopher Roy Bhaskar (Archer et al., 1998; Benton and Craib, 2011), as this thesis utilises a naturalist and realist ontology. It then briefly presents some discipline-related theories, focusing first on the theories of the British sociologist Margaret Archer. More specifically, this thesis is concerned with both her general realist social theory known as *the morphogenetic approach* (Archer, 1995) and her more specific theories on the social origins of educational systems (Archer, [1979] 2013). We then turn back to a Norwegian context and revisit Karl-Jan Solstad's argument about the emergence of local economic problems and school closures in rural Norwegian schools as a result of global ideas (Solstad and Thelin, 2006; Solstad, 2009; Solstad and Andrews, 2020).

#### 3.1 Reflections on the philosophy of science

A short and rudimentary introduction to basic critical realism is presented below. It is not a complete overview, and I have only included what I have found most relevant to this thesis. It is important to note that my interest lies mostly in basic critical realism as opposed to dialectical critical realism and the philosophy of metaReality, which are discussed elsewhere, e.g. Archer et al. (1998); Bhaskar (2002b; 2002a).

First, critical realism is a series of philosophical positions; it is to be understood as a 'meta-theory' in the same realm as positivism, empiricism, or postmodernism, among others. Searle states that realism is not really a theory, but a framework within which one can have theories. Meanwhile, Porpora states that critical realism is a way of choosing theory and looking at scientific research, determining 'good and bad theory' and 'good or bad ways to conduct research' based on congruence with one's ontological and epistemological standpoints. There is, for example, no single critical realist theory of social stratification. There are many disagreements between them, and some might even stand between several meta-theories (Searle, 1998; Porpora, 2015). However, they share an idea of ontological realism/naturalism on the basic premise that reality exists independently of our knowledge of it, or that reality cannot be reduced to our knowledge about it. The purpose of this section is therefore to present

some perspectives from critical realism and what it offers in the contextual light of this thesis.

### **3.1.1 Ontological realism and epistemological relativism**

The answer to the question ‘what must be the case for scientific experiments to be possible?’ falls into two groups, according to Benton and Craib (2011). The first is what the world must be like in order to experiments to be possible. The second is what scientific investigators must be like in order to conduct these experiments. Bhaskar uses the term ‘intransitive dimension’ for the first group of answers and ‘transitive dimension’ for the second (Benton and Craib, 2011; Bråten, 2015; Porpora, 2015). My understanding is that the division into the two dimensions is what takes critical realism out of a naïve realism and hinders *the epistemic fallacy* in Bhaskar’s terms – a collapse of ontology and epistemology into one, whereby the object of knowledge is reduced to our knowledge about it. It also acknowledges that science is partly a social enterprise, as it is conducted by scientists in interaction (Benton and Craib, 2011; Bråten, 2015).

With regard to ontology, critical realism is in line with realist and naturalist beliefs, committing to the existence of a physical world existing outside of our knowledge or belief about it, and existing without being an object for anyone. When it comes to knowledge and epistemology, critical realism is at odds with perspectivism and scepticism. The latter two state that it is impossible to have knowledge about this world outside consciousness, experience, and language and outside our concepts. Critical realism agrees that we can only know the world through the concepts that are available to us at any given time, and that reality may be studied from various perspectives.

However, realists – and critical realists among them – believe that one should not give up, that such knowledge of an external world is in principle possible, that this external world can be changed to a certain extent based on our knowledge about it, and that this knowledge is a product of the process of getting behind misleading appearances in varying forms and degrees. According to a realist perspective, the world is independent of our knowledge or beliefs about it, and that both of those things are up for correction in light of further work (Searle, 1998; Benton and Craib, 2011). Critical realist notions about knowledge must not be understood as a naïve realism or positivism with a transparent reality, where knowledge can just be picked up. Gaining knowledge about reality takes *work* according to the critical realists; this knowledge is always at least partly socially constructed, and the knowledge one might find is always fallible.

This is where we step into epistemology. Critical realism is epistemically relativist, meaning that the production of knowledge is situated with reference to the historical socio-cultural situation of the research and the researcher (Porpora, 2015). Theories are tools used by scientists in the transitive dimension to grasp what is within or to relate to the intransitive dimension among other things, and the quality of these tools is determined by the philosophical stances that exist within critical realism. Since several theories stand within the philosophical framework, one chooses the theory with the greatest explanatory power. This process is *fallible* according to critical realism, as better explanations may emerge.

This introduces a complex relationship between *map* and *terrain*, whereby epistemologies can be evaluated in terms of explanatory value, unlike perspectives where *conceptions* of reality *are* reality. This evaluation is termed *judgemental rationality* (Scott, 2010). Its potential outside of academic discussions is at least twofold. The first point of public interest is the differentiations between good and poor theories; the theory with the most explanatory power is better than other theories until proven otherwise. The second is moral potential. The idea that some theories are better than others, division of ontology and epistemology, and acknowledgement of objective conditions for our existence make it possible to commit to improvement (e.g. in the current climate crisis, pandemics, or other issues). However, at the same time, these enable us to appreciate the partly social construction that is social science and society as a whole (Bråten, 2015; 2016).

### **3.1.2 Ontological stratification**

In order to further conceptualize the intransitive and transitive dimensions, Bhaskar's critical realism further stratifies reality into three domains: empirical, actual, and real. The empirical is simply what is observed. However, many events happen but are never observed by humans, from landslides to orangutans rearing their young. This leads us to the actual domain, which contains all the events that can potentially be observed but are not observed. The empirical domain is a subset of and contained within the actual domain. According to Bhaskar, the last domain of reality is the real, and here lies the mechanisms and powers that govern the world, including physical laws such as gravity.

The three domains can be exemplified by Newton's apple: The apple that falls can be observed, and if it is, it falls within the empirical reality. All apples that fall to the ground are within the actual domain; the observed apple is simply one of many. However, apples do not fall by themselves. Scientific research has discovered that it is gravity which governs the falling apples, and gravity is within the real domain. It is

this level that scientists are trying to infer through substantive research within each scientific discipline, as such phenomena are not directly observable.

According to critical realism, each scientific discipline is concerned with a layer or aspect of reality, and this can be stratified to a degree as well. For example, physics can be thought of as the bedrock of reality, with biology situated above it, as the latter partly builds on the former. Physiology is on top of biology, but underneath psychology, which in turn underpins the social sciences. The levels of specific scientific disciplines are partly controversial, as noted by Benton and Craib (2011). Some researchers argue that sociology and psychology should be placed at a similar level, as some forms of language learning, for instance, are based on existent social learning. Moreover, a simple hierarchy does not address the overlaps between certain scientific disciplines, nor does it properly place disciplines such as meteorology and geology in relation to biology, psychology, or the social sciences.

Setting the specific separation of levels aside, what is more important to note for this thesis is that, according to critical realists, one level of reality cannot simply be reduced to the one below. For example, social science is concerned with people in the plural, and the psychology of people play into the social world. However, psychology cannot explain why nation states differ from each other, how the modern global economy works, or why institutions take different forms in different places; nor can social science explain the workings of consciousness or memory. However, the higher levels do refer back to lower ones to a certain degree; welfare institutions can improve or worsen the psychological well-being of their clients, and the climate crisis can serve as an example of social practices that have influenced everything from the birthweight of babies in severely polluted areas to biological diversity all over the globe. The formation of the new properties and powers within each layer that cannot be reduced to the level(s) below is termed *emergence*, and this term is important in further discussions within this thesis (Archer, 1995: 14).

What follows is that society, as the object of interest for the social sciences, cannot be represented as a single layer either. It is true that, without people, there can be no society. It is also true that actions are dependent upon conditions that enable or constrain them. However, ignoring either fact or conflating the two is to ignore the temporality of the two and the different ways in which people work on society and society works on people (Archer, 1995: 33ff, 93ff). This line of argument is advanced in the next two sections, which briefly discuss one of the classic problems of social theory: the interplay of structure and agency. The next section represents a metaphorical emergence from the relative depth of the philosophy of science into more

discipline-specific theories– in this case from sociology, the sociology of education, and pedagogy.

### **3.2 Education and macro-level social theory**

The theoretical focus of this thesis is the macrostructures – especially social structures related to education. This thesis draws from the sociology of education and macro-sociology in order to understand some of the spatial differences in education. The sociology of education is a long-standing field often associated with contributions from authors such as Durkheim (1973), Bourdieu (2006), Bernstein (1977), Coleman (2019), Willis (1977), and Giddens (2017). A prominent sociologist in this field is Margaret Archer, and this thesis draws particularly from two of Archer’s most significant authorship contributions. The first is the distinction between the *decentralised* and *centralised* educational systems, first presented in 1979 in *Social origins of educational systems* (Archer, [1979] 2013). In this book, Archer argues that different historical conditions have led to different education systems, whereby the distinction reflects the power relations in the educational systems, and how/where in the system political decisions about education can be made. Tone Skinningsrud uses this framework to analyse the Norwegian context, arguing that the Norwegian educational system is centralised (Skinningsrud, 2013; 2014). Archer’s second contribution is the *morphogenetic approach*, developed in connection with *Social origins of educational systems* from 1979 (Archer, [1979] 2013). It was presented as a general social theory and a method of retrodution built on a critical-realist position within the philosophy of social science (Archer, 1995). I present the latter contribution first, as it is a more general theory that encompasses the more specific theory of the emergence of educational systems.

### **3.3 The morphogenetic approach**

The morphogenetic approach was developed by Margaret Archer and presented in *Realist social theory: the morphogenetic approach* (1995) as an explanatory programme or flexible template, based on the philosophical standpoints in critical realism, which has to be ‘filled out’ to create a practical social theory. Archer introduces the concept of *conflation* to address some problems that social theory encounters when discussing the relationship between structure and agency.

The first problem is the overly deterministic view within social theory that social structures determine agential action; Archer names this *downwards conflation*. The second problem is the opposite: an overly optimistic outlook that structures are just ‘other people’, and the agents are therefore relatively free to do as they wish, given that they can convince or overcome other people (*upwards conflation*). Archer then

argues that theorists such as Anthony Giddens conflate structure and agency through a practice ontology, whereby structure and actor are the same. This is termed *central conflation* (Archer, 1995: 33ff, 95ff).

Before delving further into what the morphogenetic approach is, some attention must be placed on the definitions of some of the constituents of Archer's approach. Archer uses a specific categorisation for people; the distinction between agents, actors, and persons hints at this. It is important to be aware of the differences, not only to have a clear nomenclature, but also to avoid the pitfalls of reifying structure. After all, society and its structure and culture are ultimately the result of people's actions.

At the very bottom are individual persons: reflective people with a continuous sense of self, own identities, concerns, and projects (for a full treatise on individuals and how they navigate a structured world, see Archer (2007)). These people may be members of various collectivities, which are aggregates of people sharing the same characteristics, (e.g. being unemployed, homeless, illiterate, old, or young) (Archer, 1995: 185-186). These collectivities also includes sociological categories such as class/socioeconomic status, ethnicity, gender, and religion.

Collectivities that have the capacity to make a difference are termed *agents* (Archer, 1995: 258-259). Agents are again subdivided into corporate agents, who have articulated aims and resources, and primary agents, which are a collective without an articulated aim. Note that this is context-dependent: a collective such as a football club is a corporate agent in several sporting events, but the members are primary agents in most other areas. Most agents are limited to one or few concerns, projects, or objects, and even political parties are not involved in all contexts, despite their broad agendas. Although primary agents do not articulate anything or take any specific action, they are not to be written off; sometimes they can have an influence by their sheer numbers. For example, a political party has to take the taxpayer base into consideration when creating policy that is paid for by taxes, even if the majority of the taxpayer base is completely neutral or ignorant of the policy in question.

The last category Archer defines are actors. These are people in a role within institutions with several roles. Actors are defined as role incumbents. The distinction between person and actor is upheld, because the role is independent from its holder. For instance, power may be inherent in a role itself, and the role will continue to exist even if the person in it changes. Prime ministers and police officers are good examples; their power is in their roles, and while the role influences the person holding it and vice versa, it must not be confused with the individual person. Note that the power of a role is given by the structure.

However, this is not to detract from the individual; collectivities are made up of people, and people have different levels of powers and partake in different positions or roles. One may even argue that, in some cases, a collective may be under the control of and almost synonymous with single individuals, as some state leaders have demonstrated in the past. It is important to note that Archer's distinction still holds; such a phenomenon is a very strong person with extraordinary properties, holding a very powerful position within a collective. Power is evidently reliant upon the collective; if the collective diminishes in number or ceases to exist for some reason, so would the power of the person/actor.

Archer argues that current agents are always involuntarily placed in situations not of their own making. These situations are the result of structural and cultural conditions created by the actions of people of the past, be it resource distribution, relationships to the mode of production, demographic distribution, laws, relationships between key institutions, ethnic and religious divides, or ideologies. These conditions are not wholly deterministic; history has shown that both single individuals and incorporated agents have been known to change these conditions. What current agents have to do, however, is to act within these conditions, often guided by the logic for pursuing the vested interests that come with the positions they find themselves in. Agents have their own power to try to change, reproduce, or even avoid these conditions, either unknowingly, unintentionally, or intentionally. Whether conditions are changed and undergo *morphogenesis*, or remain unchanged and stay in *morphostasis*, relies not only on an agent's will to change or not, but on the result of the interactions, agreements, compromises, or dominations taking place when several agents interact. The result of this social interaction is then followed by structural elaboration ending in either morphogenesis or morphostasis, which makes up the structural and cultural properties that conditions the situations in which future actors will be involuntarily placed. It is important to note that this structure is a case of *emergence*, and the 'end' result is not the result of a single actor's will, but that of conflicts, agreements, compromises, and unintended consequences. The point of emergence is further elaborated below.

In addition, what this short outline illustrates is the temporal and causal difference between structure/culture and agency. Structure is ontologically different from agency; it is the emergent result of several forms of agency and action, but irreducible to the different forms of agency and agential action as it is the result of agreement, compromise, and domination between different actors. It is also temporally and causally different from agency. Today's actors are limited by the structures of yesterday, and they may or may not change these structures for their successors. Some

of these structures have proven to be relatively enduring, such as the church, educational system, or nation states. They have not, however, remained unchanged through their existence, exemplified through the emergence of Protestantism in Christianity; takeover of education from the church by the national state; and redrawing of borders prior to, during, and after both World Wars.

The morphogenetic approach is a method of retroduction based on a critical-realist position within the philosophy of social science; in a sense, it is the structure-agency interplay sketched out above operating in reverse. One of the most important rationales for using the morphogenetic approach in this thesis, partly as a methodological tool but even more as an analytical one, is the inclusion of both agency and structure/culture. Structure and culture provide limitations and enabling conditions for both individual and group agency, which in turn interact and create practices whereby changes and/or reproduction in structure and culture emerge over time. Including both structure/culture and agency helps to avoid the end result of a deterministic structure/culture without room for agency, or a decontextualised actor with an agency which meets no obstacles of the past.

In the case of this thesis, Archer’s approach allows for a description of historical, structural, and cultural phenomena, as well as how structural, cultural, and agential emergent properties confluences (Archer, 1995: 192-194). Archer’s approach does not explain anything itself but works as a framework for ‘how to go by’ when conducting social science. The figure below is a visualisation of the approach by Archer, taking structural morphogenesis as a starting point:

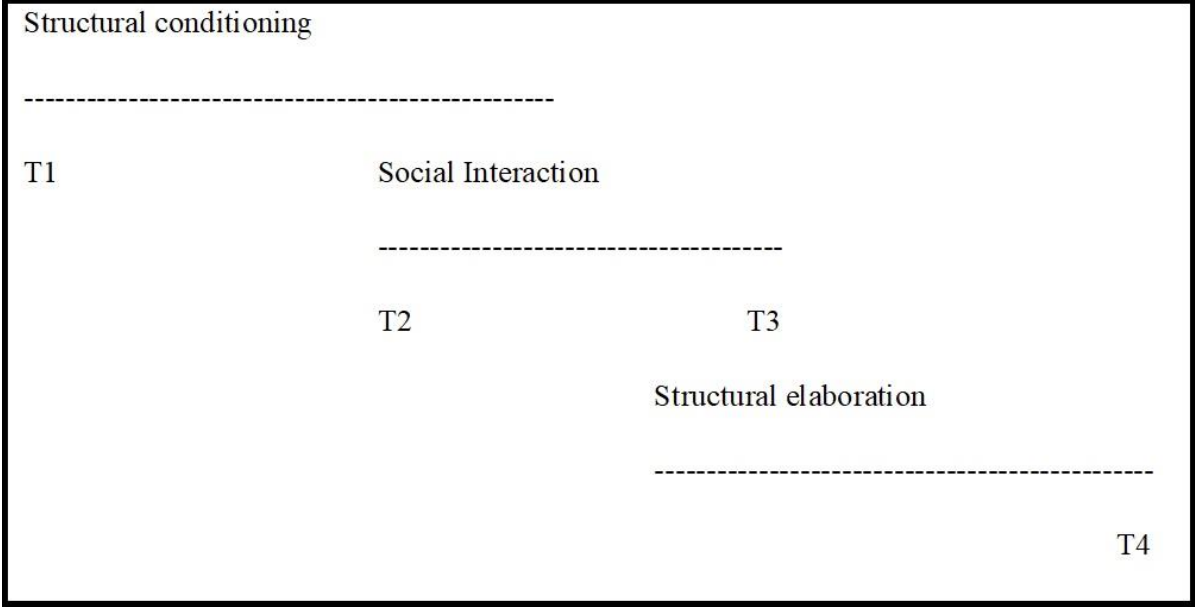


Figure 1. The morphogenetic cycle (Archer, 1995: 77-79, 157)



In Figure 1, T4 illustrates a structural condition at a point in time of interest. This T4 is the result of structural elaboration at T3, whose number indicates that it occurred prior to T4. This elaboration is the result of social interaction between relevant agents between T2 and T3, in the context of a structural conditioning at T1. It is important to map out all the relevant agents, agendas, and mechanisms at work between T2 and T3, as well as how they interact and whether or not this interaction has led to change (morphogenesis) and/or reproduction (morphostasis) at T4. Note that these sequences or cycles can happen simultaneously and at several levels in society, and T4 may serve as the start of another cycle at T1, meaning that a structural elaboration at one point can be the context or structural conditioning in another cycle (Archer, 1984: 8-9; 1995: 77-79).

A similar template exists for cultural morphogenesis, the main difference being that cultural elaboration is preceded by socio-cultural interaction and cultural conditioning (Archer, 1995: 192-194). The link between structure and culture is the interaction of agents, who have to grapple with both. It is through interaction that structure and culture impact each other; for example, agents may defend their structural position with ideological claims from the cultural realm. For now, it suffices to say that structural and cultural morphogenesis can be synchronised, but they are often not. An example could be that ideology is out of sync with the structural changes that its adherents seek to perpetrate, and they impinge on each other (e.g. the idea of abandoning slavery came before the actualisation of the abandonment).

During interaction, agents themselves may also undergo a change (agential morphogenesis; e.g. a change in agenda, size, or constituents, which are people and their concerns). This change is termed the morphogenesis of agency, and it follows a similar template as structural morphogenesis. Here, group elaboration is preceded by group interaction, which is in turn preceded by the socio-cultural conditioning of groups (Ibid.). While this thesis takes some interest in cultural and agential morphogenesis, it is the structural aspects that are of the greatest interest here. The morphogenetic cycle is used in this thesis to illustrate how structural and cultural conditioning effects social interaction on a national macro-level that leads to different results on local meso- and micro-levels, depending on context and place.

### **3.3.1 First-, second-, and third-order emergent properties**

Archer makes a distinction between various emergent properties. These are divided into first-, second-, and third-order properties that exist as both structural emergent properties (SEPs) and cultural emergent properties (CEPs) (Archer, 1995: 172ff, 325). First-order emergent properties are the direct result of choices (actors make during social interaction. These can be demographical, for instance, as people move around

for various reasons. They maybe also be political, as changes in or even new laws, policies, and national budgets are made as the result of political negotiations. Other examples are institutions or resource distributions. These first-order emergent properties are simultaneously an elaboration by previous cycles and a part of the conditioning.

Second-order emergent properties are the ‘result of the result’, or the result of relations among first-order ones. They include institutional configurations and relations, as well as situational logics. Relations between institutions create the situational logic, which gives directional guidance to the agents involved. The situational logic is decided by institutional configurations in the structural system (SS) and constellations of propositions in the cultural system (CS). These configurations decide whether the institutional configurations are in a contradictory or complementary relationship in terms of interest/agenda, and whether this relationship is necessary or contingent. The situational logic and configuration at SS or CS give directional guidance of actions at the level of social interaction (SI) or socio-cultural interaction (S-C), both at the level of interaction. Table 1 shows the various institutional configurations and which situational logic they lead to. For a full explanation of all possible institutional configurations and situational logics, see Archer (1995: 218ff).

	Contradictions		Complementarities	
	Necessary	Contingent	Necessary	Contingent
<b>(Situational logic)</b>	(Correction)	(Elimination)	(Protection)	(Opportunism)
<b>CEPs</b>				
<b>C.S. level</b>	Syncretism	Pluralism	Systematization	Specialization
<b>S-C. level</b>	Unification	Cleavage	Reproduction	Sectionalism
<b>SEPs</b>				
<b>S.S. level</b>	Compromise	Competition	Integration	Differentiation
<b>S-I. level</b>	Containment	Polarisation	Solidarity	Diversification

Table 1. Cultural and structural morphogenesis/morphostasis at the systemic and social levels (Archer, 1995; Knio, 2018)

Third-order emergent properties are the result of the result of the result; these properties are created as a result of interaction. The actions of agents under structural and cultural conditioning lead to elaboration. Elaboration is a third-order emergent property in which the end result is either reproduction (morphostasis) or change (morphogenesis) of the structural/cultural aspect of interest and of the agents themselves. In addition, one may have morphogenesis at either the structural, cultural, or agential level, but morphogenesis at one level does not mean morphogenesis of society as a whole. For now, it suffices to say that the conjunction between several types of morphogenesis speeds up the morphogenesis of the aspect of interest or even society as a whole, while morphostasis does the opposite.

The most important point for the analysis in this thesis is that reproduction or change does not hinge upon one specific structure; rather, it relies on the interaction between structure, culture, and what people in groups decide to do.

### 3.4 Educational systems

Archer's general theory above was derived from her specific theory of the emergence of educational systems, and the former encompasses the latter. The field-specific application is interesting for this thesis, as education is the locus of this thesis, and the educational system is an important structural precondition to the people that navigate it from within.

Archer defines the state educational system as 'a nationwide and differentiated collection of institutions devoted to formal education, whose overall control and supervision is at least partly governmental, and whose components and processes are related to one another' (Archer, [1979] 2013: 54). According to Archer, the state educational system in many European countries has morphogenetically emerged from being largely integrated with the church to being integrated with several interest groups within a nation state as the need for education grew. Whether the national educational system became centralised or decentralised was contingent upon the actors involved in challenging the church/state monopoly on education, as well as the resources and strategies involved in their challenge of domination. In general, the choice of a *substitution* (competition) strategy lead to several educational outbids and a decentralised educational system (e.g. England), while political *restriction* through laws place the state in control and therefore result in a centralised educational system (e.g. France). Note that the typology is not a dichotomy but rather a distinction; many educational systems exhibit properties related to both types, with one being more dominant than the other.

In Archer's terms, a centralised educational system is governed *centrally* by a leading group, which create reforms and guidelines from a centre of power. A centralised system has a high degree of *unification* of educational laws and other policies such as guidelines, curriculum, standards, and control over private provisions outside the state system. Unification has two dimensions: *intensive unification* refers to the degree of strong and effective government control over the nation; an increase in intensive unification is an increase in top-down dominance. *Extensive unification* is the degree to which policy is carried out everywhere within the country (Archer, [1979] 2013: 174). A centralised system also has a high degree of *systematisation* in the relations between educational institutions, for instance through a lack of bottlenecks between primary, secondary, and tertiary levels of education; (Archer, [1979] 2013: 176).

Other properties of a centralised educational system are low levels of *differentiation* between the educational and other institutions, meaning that the autonomy of the educational system (and its teachers) is low vis-à-vis other institutions (Archer, [1979] 2013: 179). Lastly, the degree of *specialisation* in the options offered to students is low, as the admission requirements, processes, and end competence achieved are universal in a centralised system (Archer, [1979] 2013: 180). Figure 2 below illustrates the structure of the centralised system and how educational change is achieved:

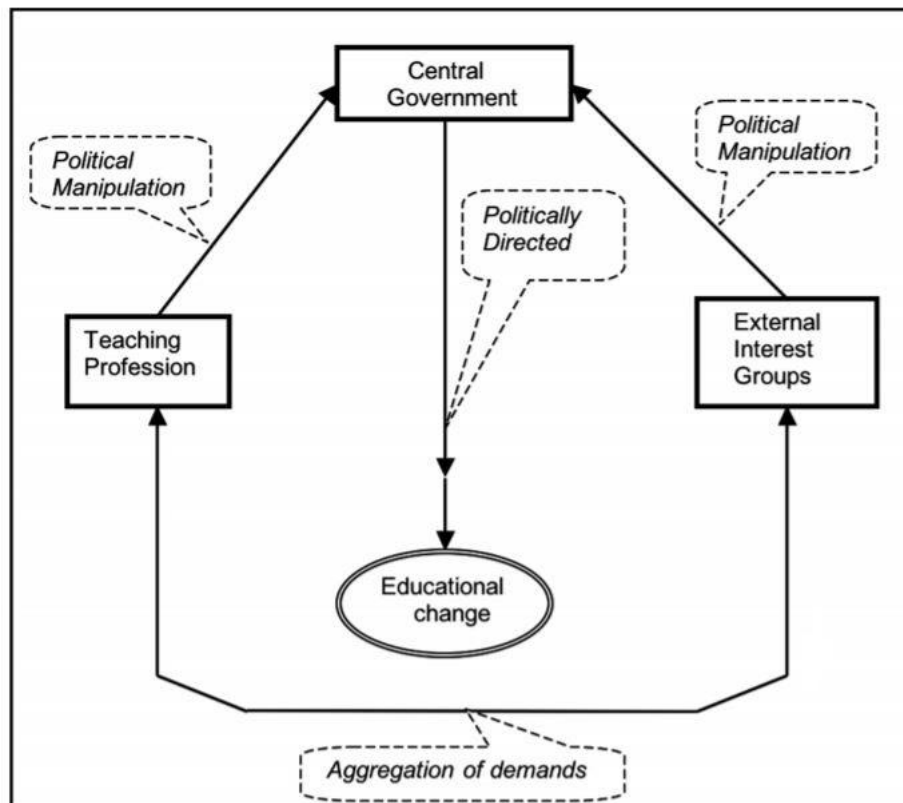


Figure 2. The centralised educational system (Archer, 1984: 117; 2008)

Demands in a centralised system have to go through negotiations with a central government, which then make uniform changes to the educational sector as a whole. The distribution of power in the society in general and within the educational system is then decisive for negotiating positions, the demands which the negotiations will be about and lastly, the educational changes that do or do not happen.

This is in contrast to a decentralised system, where structure and content can be decided more locally through school boards, for instance. The degree of *unification* and *systematisation* are lower, while the possibilities of *specialisation* and *differentiation* are higher, as the greater number of educational actors with actual power and economic resources allows for a more diverse and institutionally

autonomous educational outbid. The decentralised educational system is illustrated in Figure 3 below.

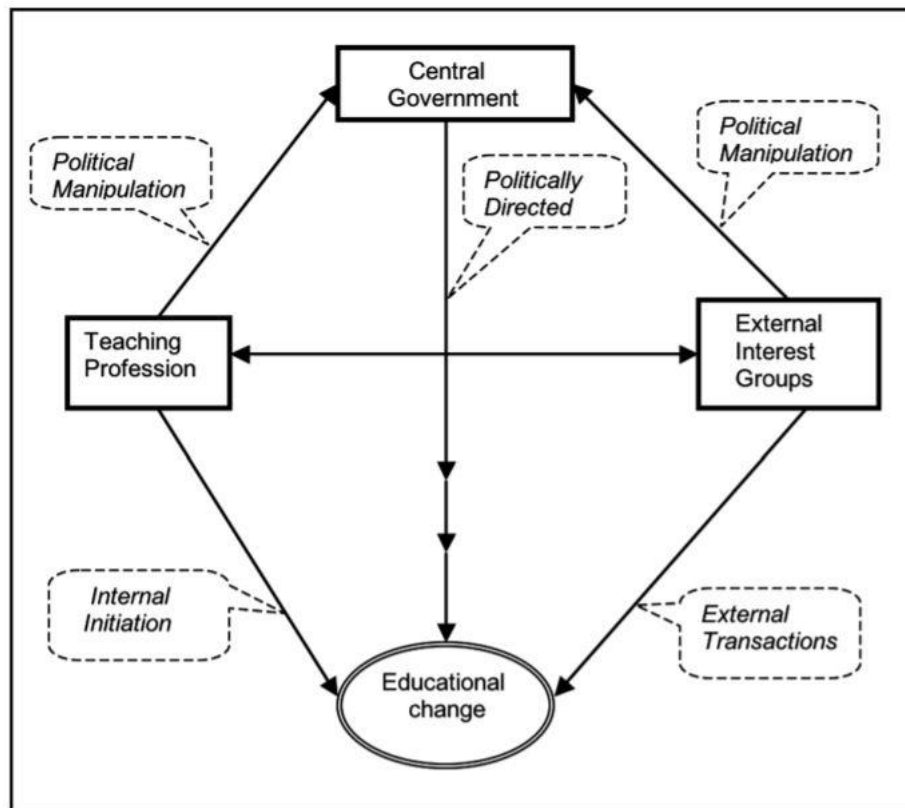


Figure 3. The decentralised educational system (Archer, 1984: 118; 2008)

Figure 3 illustrates an important difference between the two types of educational systems. In the decentralised system, educational change is not only instigated through the central government, but also through other interacting interest groups, all pushing for educational change towards each other and/or for instance a local school board.

Within a centralised system, few real channels of influence exist, and changes are slow and hard to achieve, as it has to happen through an aggregation of demands towards a leading group, in this case politicians in the government and parliament. This typically leads to a stop-go pattern of change, as a sufficient aggregation of demands takes long to achieve, leading to sudden implementation after long periods of still-stand (Archer, 1984: 173). Furthermore, a governing elite in a state with a centralised system would rarely if ever accept a change to a decentralised system, as that would mean a loss of both power and political capital to spend for the governing elite (politicians) in charge (Archer, 1984: 200; Skinningsrud, 2014). A centralised educational system also seldom gives away power, as that would mean a loss of political capital (Nordkvelle and Nyhus, 2017; Archer, [1979] 2013). Freedom and autonomy for actors within the system are allowed in ways that do not compromise power distribution. These can

therefore be thought of as *concessions*, meaning that the freedoms are granted by the leading group to avoid any changes in the power distribution within, although not always successfully so (Archer, 1984: 178-179).

A generic problem that manifests in centralised education systems is a tension between the system and its surroundings. This tension is not only because change in a centralised system always lags behind the demands of the surroundings due to the time-consuming process of changing legislation and policy centrally, but also because the various demands are incompatible with the internal logic and effectiveness of the system itself (Archer, 1984: 188; Skinningsrud, 2014; Archer, [1979] 2013: 254).

Another important structural property in educational systems is resource distribution. According to Archer, access to resources upon which educational operations depend is a key aspect for a group to maintain its dominance over the educational system once they gain control. Resources in this context would include both financial and human assets that which educational operations depends and by extension could be transformed into schools and teachers. These resources can be guarded through ideology legitimising the current dominance and/or a series of constraints that prevents other groups from challenging the dominating group (Archer, [1979] 2013: 91-98). This is the case in both types of educational systems.

Since the conception of Archer's analysis in 1979, newer, supra-national organisations such as the EU and OECD have entered and changed the playing field, and analytical work must be undertaken to unpack how the regulations and recommendations from these actors play into different state educational systems. A brief look may suggest either placing these players in a separate category that influences the central government (and perhaps more locally in the decentralised system) or grouping them under the existing category of *external interest groups*. I do not take a stand on this issue, as it is beyond the scope of this thesis. This is not to deny the existence and effects of these actors, as briefly shown and discussed in a latter section in this chapter, as well as in the analysis chapter.

### **3.4.1 The Norwegian context**

Centralised and decentralised educational systems are terms often used to define the distribution of decision-making power and strategies of governance *within* the educational system. Skinningsrud shows that there have been different conclusions about the Norwegian educational system and its degrees of centralisation or decentralisation (e.g. Kvalsund, 2009; Karseth et al., 2013; Skinningsrud, 2014; Volckmar and Wiborg, 2014; Nordkvelle and Nyhus, 2017). According to Skinningsrud, most of these definitions are only discussing limited aspects of the

system and fail to describe the system itself; she argues that Margaret Archer's analysis of educational systems is more adequate in overcoming these problems (Skinningsrud, 2014).

Skinningsrud argues that the Norwegian educational system emerged as a centralised system in Archer's terms between 1896 and 1940 (Skinningsrud, 2013). The unification and systematisation are high, while differentiation and specialisation are low; politicians pass national legislation and decide on the national core curriculum with low levels of specialisation for students aged 6 to 16. There is also a high degree of systematisation, as seen in the lack of bottlenecks between primary, secondary, and tertiary schools (Solstad and Thelin, 2006; Skiningsrud, 2013; 2014; Nordkvelle and Nyhus, 2017). Furthermore, there has been increasing unification and reduced specialisation in the 1990s and 2000s through the R94 and LK06 reforms, as the number of vocational tracks has been reduced, making the Norwegian educational system increasingly centralised (Solstad and Thelin, 2006; Skiningsrud, 2014).

This centralisation has also impacted rural education; Solstad points out that the laws regarding urban and rural education differed in Norway up until 1959, at which point the two types of schools became unified, and obligatory primary and lower-secondary education of nine years become law in 1969. According to Solstad, there was a sentiment traceable to the 18<sup>th</sup> century that city schools were simply better due to their larger sizes, and that children from rural areas needed to learn to read and write like their urban counterparts. This led to a situation where the urban school served as a premise supplier for rural ones when they became unified (Solstad and Thelin, 2006).

### **3.5 Funding of education through municipalities**

Economy and funding are an important part of the educational system, as economy constrains and enables the actions of the agents within. It does this unequally based on geographic location, as shown in the previous research section (e.g. Biddle and Azano (2016). This is also the case in Norway, most clearly articulated in the scholarship of Karl-Jan Solstad, who explores these specific issues in a Norwegian context.

Economy is the most important justification for rural school closures in Norway, with a failing number of students in the catchment area (as a result of rural depopulation) coming in second (Solstad, 2009). The income of municipalities is based both on tax income and funds received from the state. A dwindling rural population with an aging demographic profile and lower socioeconomic status than its urban counterparts negatively affects the tax foundation and welfare costs of the municipalities, as well as the demographic foundation for the existence of rural schools (Johansen, 2009; Solstad, 2009).

Before 1986, school budgets were approved by the state, and funding was earmarked and transferred based on the approved budget. In 1986, municipalities took over the funding and associated administrative tasks of public elementary and lower-secondary schools from the state as a part of the New Income System (NIS-86). This was followed by the New Municipality Act of 1992, granting municipalities even greater power over changes to local school structures without state intervention. The delegation or ‘decentralisation’ of funding and political power was well received by the municipalities as a move that increased autonomy. School funding was no longer earmarked or refunded but was given as part of a large transfer for education, health, and other duties delegated to the municipality level. These transfers – based on objective measures such as population, population density, and age distribution – were given to municipalities to distribute themselves, allowing for reallocation of funds (e.g. from education to health), solving the problem that many municipalities had with funding imbalances (Solstad and Thelin, 2006; Kvalsund, 2009; Solstad, 2009; Nordkvelle and Nyhus, 2017; Solstad and Andrews, 2020).

A common scenario after delegating the task of financial prioritisation to municipalities has been a situation resembling a *zero-sum game*<sup>3</sup> in municipalities under economic pressure. The model for municipal funding is based on the number of inhabitants, and, while some modifiers for geography and demographics are included, the model does not adequately reflect situations such as extraordinary health costs due to a relatively large number of persons in need for special care, increased overhead costs in teacher salaries, and building maintenance per inhabitant for smaller municipalities. When resources are experienced as scarce, poorer municipalities have to make difficult choices in their prioritisation of public services, often having to choose between health and education, the two largest items of expenditure. This has led to school closures in poorer rural municipalities with smaller schools in order to save money, as smaller schools have a higher overhead costs compared to larger schools, and rural municipalities tend to have a demographic profile of an ageing populations with less tax income and higher welfare costs per inhabitant. Solstad argues that this can be conceptualised as a geographical centralisation from smaller local communities towards municipality centres (Solstad and Thelin, 2006; Kvalsund, 2009; Solstad, 2009; Nordkvelle and Nyhus, 2017).

Globalisation impacts education in many ways, and Solstad and Andrews (2020) identify four aspects that have consequences for rural communities and schools. The

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<sup>3</sup> This situation is not a real zero-sum game, as the municipality is not a real closed system with finite resources (e.g. municipality taxes on property can be increased).



first is *neo-liberalism*, which favours minimisation of the public sector; in rural areas, small, peripheral organisations, institutions, and communities are unable to compete successfully, as costs per unit are too high in sparsely populated areas. The second is *new public management*, which emphasises cost-cutting and efficiency through measures, without being able to capture for instance school-community interaction. This leaves small rural municipalities and small school units particularly at risk. The third aspect is *supra-national institutions* such as EU, EES, OECD, and PISA, where powerful recommendations without insights into local challenges influence national authorities. The last aspect is *ICT-driven compression of time and space*, which, according to Solstad, has a weakening effect on local communal ties and identity (Solstad and Andrews, 2020).

Solstad argues that these forces – perhaps mainly the first two – are what inspired the NIS-86 as described above. Furthermore, the introduction of international testing programmes such as PISA have introduced the possibility of comparison and competition, leading to measures to improve Norway’s mediocre results in this area. Introducing neo-liberal and new public management accountability measures may all work to the disadvantage of rural schools, as these schools are unable to be cost-effective on the same terms as urban ones (Solstad and Andrews, 2020).

## 4 Methods and reflections on ethics

The aim of this study is to capture teachers' work experiences in different spatial contexts in order to explore spatial inequality in education. To obtain both teachers' work experiences and the spatial context, the thesis is based on 18 qualitative semi-structured interviews, in combination with participant observation. Twelve of the interviews were conducted with teachers residing in Grønnvik and six with teachers in Tromsø; the interviewees are of both genders and different ages. The participant observation were carried out in the case municipality of Grønnvik over a period of three months in the first half of 2018, mainly around the municipality centre. The analysis also draws upon the author's prior knowledge and experience from living and working in the case municipality of Tromsø.

This chapter contains two parts: methodological considerations and ethics. First, the methods and data collection strategies utilised for data collection in this PhD thesis is presented; this includes the sociological case study, participant observation, qualitative interviews, and commensurability between the latter two. I then give an account of the data collection for this thesis, starting with a chronological outline of the data collection process, including participant observation. The interview process is then described and discussed. This is followed by a discussion of the problem of doing fieldwork in a very familiar context and the challenges of being a reflexive researcher. Ethics is presented at the end of the chapter. This includes a discussion about asymmetric relations between researchers and research participants, consent, data confidentiality, and research footprint. The quality of the study is not included in this chapter, but it is discussed at the very end of the analysis.

### 4.1 Sociological case studies

Sociology and anthropology have long been preoccupied with *context*, with sentiments along the lines of 'there is no such thing as action without context'. An important argument for the inclusion of context and structure was included in the introduction and further explored in the theoretical framework; people are born and raised in contexts not of their own choosing. The context conditions persons and agents (collectivities) to a certain degree by giving out punishments for certain actions and rewards for others.

An important part of context is the inclusion of the temporal dimension. Structure and culture are both activity dependent of the people within them, but this constraining or enabling by structure and culture in the present are the result of past activities, as shown in the theory chapter. Given enough change in actions, one may get a change in

structure and/or culture, but this is not a given; it depends upon the limitations, affordances, agendas, actions, and interactions of the agents within. Mapping out the significant agents, their cultural ideas and agendas, their battles over time, and the emerging result of these battles is a good way to show the emergence and development of the historical context. Another important part of context is the spatial dimension, and this is surely also the case with rural education. The usage of the adjective *rural* implies that space and place matter in regard to education, as discussed in Chapter 2 (Corbett, 2007; Kristiansen, 2014; White and Corbett, 2014; Bæck, 2016),

In order to investigate the impact of different contexts, this thesis and PhD project is part of a sociological case study, where my contribution consists of qualitative interviews and participant observations of teachers in Northern Norway. Case studies are often qualitative, and Fangen states that the case study can be characterised by collecting detailed information on rather few units, as the phenomena in question are often both complex and sensitive to context (Fangen, 2010). This is certainly the case in RUR-ED, as the subject of rural and urban education and inequalities implies a need for a contextual understanding beyond what can be gathered through the use of only an experiment or a survey. RUR-ED employs a plethora of methods, four case municipalities in Norway, and at least three case municipalities abroad in order to illuminate the necessary aspects of rural education; these aspects are treated in separate sections below (RUR-ED, 2017).

As a case study, RUR-ED encompasses a total of four case municipalities, and this PhD thesis is built on two of these case municipalities. Choosing two field sites over one helps the researcher to avoid overextending generalisations made from contingencies that may be bound to a very small geographical area, therefore gaining validity and the possibility of comparison (Engebriksen, 2002; Fangen, 2010). The choice of two and not three or more case municipalities is a compromise between collecting data for comparative use and at the same time facilitating in-depth understanding by spending an adequate amount of resources and effort on a limited number of cases.

#### **4.1.1 The selection of case studies**

The rural case municipality of Grønnevik was chosen based on several parameters. The first aspect was self-interest; parts of the local education system in Grønnevik have been in contact with the research group from the beginning of RUR-ED. Grønnevik also exhibits several characteristics that have been known to impact rural education, some of which were mentioned in the introduction chapter. The second aspect is that some of the municipality's educational results at elementary and lower secondary were below average. Thirdly, the municipality is rural in a geographical matter; there are

large geographic distances within the municipality with a relatively low population density. The fourth aspect is the economic situation of the municipality, which has been suboptimal for at least two decades. The fifth is an ethnic aspect found in many places in Northern Norway: the presence and former assimilation of the Sami and the Kven. All these aspects found in the same municipality make for an interesting case for comparison, not only with an urban counterpart, but also possibly with other rural case municipalities at some point in the future.

The urban case municipality of Tromsø was chosen on account of other parameters. As the author's place of residence, not only is the choice a pragmatic one, but Tromsø is also distinctly non-rural. It is the largest city in Northern Norway, and, while other alternatives for an urban case municipality exist, they are not only smaller in size, but also impractical for pragmatic and financial reasons. Another reason is discussed later in this chapter; the author of this thesis has worked and received teacher training and certification in Tromsø. This intimate knowledge has proven important for understanding the educational context in Tromsø.

An interesting reason for comparison is that a centralised educational system with unified policy seems to yield different results based on geographical location, and the reasons for the differences between the two case municipalities was thought to be a good starting point in enquiry.

An important point has to be made when it comes to the rural-urban continuum. The previous research chapter showed the general difficulties in defining what is rural, and this is also the case in this thesis. The two case municipalities presented above can be understood to represent different positions in relation to a rural-urban continuum or dichotomy. Even so, it is important to keep in mind that a rural municipal centre may not qualify as rural, as in the case of Grønnvik. According to Statistics Norway, the municipal centre of Grønnvik may be considered a town with a relatively dense population (SSB, 2019b), as it holds many features that are usually related to more urban-like locations. At the same time, however, this vast school district's only public upper-secondary school draws its pupils from the entire municipality, including remote villages that are certainly rural in character. Therefore, this thesis (and the articles included) does not include a working taxonomy of the rural-urban continuum or binary; instead, it focuses on *different spatial contexts, putting forward contextualisation* as a way to address spatial differences (Bæck, 2016).

#### **4.1.2 Why teachers?**

Teachers are in a complementary relationship with the student; the very existence of the student relies on that of the teacher, and *vice versa*. Teachers and parents are the

two most influencing external factors in student achievement (Kristiansen, 2014). According to Stronge, the effectiveness and quality of teachers play a huge role in students' academic success, and he argues that the quality of teaching is the most important school-related factor in student achievement (Stronge, 2010). Similar sentiments have also been expressed by others (e.g. Hattie, 2003). Unsurprisingly, certified teachers fare better than uncertified ones (e.g. Goldhaber and Brewer, 2000). While almost all accounts of the contributions that teachers make to student achievement are large, the exact effect is hard to measure, as illustrated by Bitler (2019).

Furthermore, the teaching position is in the centre in a web of educational relations. Teachers possess insights into on their own challenges, the challenges that students face, and how both of these relate to the contexts of the educational system, national guidelines, school leaders, students' families, and the local community. The position of the teacher is therefore uniquely practical when considering policy implementation (Barter, 2013). The combination of (1) the necessary relation between teachers and students and (2) the position of the teacher in the middle of an educational web makes an even stronger case for enquiring into teachers and their work experiences when discussing spatial inequality in education and especially rural education. Not only is it of interest to know who these teachers are, but an analysis of their experiences with, for example, education policy may be a good entry point into these discussions.

## **4.2 Data collection strategies**

The author is trained as a social anthropologist, and this is reflected in the data collection strategies utilised in this thesis. The chosen methods are participant observation and semi-structured qualitative interviews. Presented below is a short, general introduction and discussion of the methods chosen, followed by a discussion of the commensurability of the two data collection strategies. A more specific account of how the data collection strategies were used in the respective case municipalities is given later in the chapter.

### **4.2.1 Participant observation**

Participant observation is a data-collection strategy mainly associated with qualitative research within the social sciences and humanities.<sup>4</sup> Its name implies that the

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<sup>4</sup> There are disagreements on what participant observation is. For instance, Michael Angrosino defines it as the behavioural context whereby one uses established techniques or strategies to collect data, and ethnography is used as a label for the method (see ANGROSINO, M. & FLICK, U. 2007. *Doing ethnographic and observational research*, London, SAGE. In this thesis, I take participant observation to mean the data-collection strategy, even when it is referred to as a 'method'.

researcher takes on a double role as a participant and observer among the people whom he/she studies and follows them over time as a participating subject.

Traditionally, participant observation has been thought to allow practitioners to observe ‘what people do’, using observations of actions and/or practices as data (Atkinson and Coffey, 2003; Fangen, 2010). The method is practised primarily by anthropologists and sociologists, but it is also utilised by researchers within pedagogy, medical science (medical anthropology), and religious studies, among others.

Participant observation is also used in a wide variety of theoretical orientations, such as structure-functionalism, symbolic interactionism, feminism, Marxism, ethnomethodology, critical theory, cultural studies, and postmodernism (Angrosino and Flick, 2007).

The degree of participation can also vary. One can find pure observation and little or no participation on one side of the continuum to engaged anthropology, complete participation, and *going native* (a level of participation where immersion is so high that the researcher’s perspective is lost) on the other (Spradley, 1980; Angrosino and Flick, 2007; Low et al., 2010; Wadel et al., 2014). The various degrees of participation each has its own advantages and drawbacks, as discussed below. My experience is that the degree of participation varies throughout a project, due to both circumstances (other’s expectations towards the researcher, as well as the opportunities that may arise during data collection) and changes in the researcher’s agenda and what he or she wants to accomplish.

There are many advantages to participant observation. Among the most common are the possibility of understanding life ‘from the native’s point of view’ and the closely related possibility of an intimate understanding another society (Spradley, 1980; Fangen, 2010). This relates to the distinction between the *emic* (insider) and *etic* (outsider/researcher) perspectives, as well as the understanding that can be gained from the tension between the two (Harris, 1976). Participant observation also allows for a longer temporal perspective than many other qualitative methods. At least in its anthropological and sociological variants, it is a time-consuming method of data collection compared to other methods, as the data collection typically may last from four months up to several years, the latter often including periods spent in and out of data collection. This means that it is possible to gather data on practices and interaction over time, as well as access changes in contexts where these actions take place.

These advantages come with some consequences or a ‘flip side of the coin’.

Participant observation is time consuming, and the amount of data accumulated through field notes, field diaries, and interviews can be quite overwhelming. This does

not diminish the scientific merits of the method itself, but it may constitute a negative for projects under time constraints. The data collected through participant observation also make the most sense to the person(s) who collected it or who has an intimate knowledge of the field, hence they may be less ‘shareable’ than other types of data, such as transcribed interviews or documents.

In addition, researchers have not always been conscious enough of their own cultural biases, evident in tendencies to present their research as more ‘objective’ and their subjects as more mystified, radically different, and/or irrational than what might be realistic or fair. This was probably more prevalent during the traditional period, when anthropology emerged as a discipline alongside French and British colonialism (Asad, 1973; Larsen, 2009; Eriksen, 2010). The concerns around researcher bias is discussed in the section later in this chapter on fieldwork in one’s own culture and reflexivity.

#### **4.2.2 Qualitative interviews**

Qualitative interviews are another data-collection strategy often employed in social science, especially among sociologists. It is a sub-category of interviews within the social sciences, which ranges from the more rigid-to-form surveys used in quantitative analyses and formally structured interviews on the one hand to semi-structured interviews and unstructured talks on the other; interviews may also be conducted with several people at once as focus groups or with a single interviewer and interviewee. Randi Kaarhus describes the everyday quality of the semi-structured research interview and states that a research interview is a special kind of face-to-face interchange, with its own unique context and asymmetric relations (Kaarhus, 1999). For this thesis and my project, the semi-structured interview between a single interviewer and interviewee is the most commonly utilised form.

There are both advantages and drawbacks to interviews. On the positive side, interviews are less time-intensive than participant observation, at least in the data-collection phase. My experience is that one can collect data from more subjects and geographical places, as well as within a greater variety of social spheres, through interviews than through participant observation, and the flexibility and adjustability in interviews is greater if changes are necessary. Written transcriptions of interviews also make for easier sharing within a research project or group compared to field notes from participant observations.

In term of drawbacks, Jerolmack and Kahn state that interviewers often conflate self-reports and behaviours, falling into the ‘attitudinal fallacy’ of representing self-reports unambiguously as what people do. The authors suggest looking into ethnography to go beyond individual-level accounts and into collective acts. This is not to say that self-

reports are without value or problematic in themselves, but the conflation of self-report and behaviour can be problematic (Jerolmack et al., 2014). This relates to the argument from Michel Polanyi that ‘we can know more than we can tell’, pointing towards a dimension of tacit knowledge that may or may not be verbalised. His conclusion is that not all knowledge can be expressed verbally but has to be collected through other, suitable means (Polanyi, 2009). A deeper description and discussion of how the interviews were conducted for this thesis is presented later in a designated subchapter.

#### **4.2.3 Methodological triangulation: The commensurability of participant observation with qualitative interviews**

A common strategy briefly touched upon above is methodological triangulation. It simply means a combination of several methods at once, and it is widely used in case studies (Fangen, 2010). RUR-ED is staffed by scientists with diverse backgrounds, ranging from statistics in political science to sociology, human geography, pedagogy, and social anthropology. The data-collection methods also range from surveys, registry data, qualitative interviews, and participant observation. I limit the discussion to participant observation and qualitative interviews, as these are my contributions, and show how the two can complement each other.

This part of the text directly relates to the first research question for my PhD project as a whole, namely, the work experiences of teachers in different spatial contexts. I argue that some of the teachers’ experiences can be expressed verbally and later analysed and understood through interviews. I also argue that some experiences are of a tacit nature, meaning that they are better collected through participant observation (or through other methods). A combination of the two is more time efficient than participant observation alone, and will battle the time-consuming part of participant observation, as the accumulation of data material can be accelerated and adapted through the use of interviews. The use of interviews enables data sharing, while participant observation allows for deeper contextual knowledge, which in itself can be both data and the backdrop for interpretation of interview data.

Katrine Fangen states that there exist a (somewhat simplified) divide between interview data as discursive, and observational data as data on practices and actions (Fangen, 2010). This divide, and the anthropological cannon favouring participant observation, is also discussed by Atkinson and Coffey (2003), who argue that interview talk may also very well be action. This point is commensurable with Wittgensteinian *speech acts*, whereby speaking can be performative (Skinner, 2002). An experience of speech acts and a good example of methodological commensurability occurred during the data collection in Grønnevik as well. A portion



of the interview questions was about policy and school leadership, and the interviewees often provided what they thought I would like to hear, or what they thought of as the ‘party line’ or the politically correct answers. While this is still data, it nonetheless felt performative to a degree. The hunch of a performative act was later confirmed through participant observation and the temporal dimension it adds, through break-room chatter, and through the observed discussions and actions of the interviewees at later points in time where a more heterogeneous multitude of opinions emerged.

The combination of participant observation and other data-collection strategies is quite widespread. Fangen discusses this as a common variation of methodological triangulation and states that the combination can lead to better validity. This validation is achieved through the use of qualitative interviews as an entry point into examining the data from participant observation, and vice versa (Fangen, 2010). Not only does the combination provide validation, but it also provides data from both methods, allowing for a deeper understanding that would not be accessible by only choosing one method.

### **4.3 An outline of the data collection**

This section presents an outline of the data collection for this thesis, followed by a description of the interviews, the interview guide, and how they were conducted and recorded. This section aims to give the reader a transparent view of the data-collection process in order to substantiate and hopefully render probable the results presented in the articles, as well as to present some context for both the results and the later analysis. Transparency is relevant to the quality of research, which is touched upon at the very end of the thesis.

This thesis exists in the intersection between sociology, anthropology, and pedagogy; but in terms of methods, the thesis has a strong anthropological influence. It follows, then, that the methodological chapter has a very distinct anthropological trait: the ethnographic *I* or first-person perspective. In qualitative research, the researcher is both the measurement instrument and the analyst, and the inclusion of the first-person perspective in the following sections elucidates this division and transparently problematises myself as the measurement instrument.

#### **4.3.1 Grønnavik: Participant observation and interviews**

The participant observation started with a short visit in 2017, followed by me living in Grønnavik from January 2018 to April 2018, with some return visits after this period. The swift start was made possible by the research-project leader negotiating access prior to the beginning of my PhD project. I found a place to rent for a month at a local

apartment hotel before transitioning into a small bed-sitter at an acquaintance's house. Most workdays were spent at the public upper secondary, where I conducted 10 of the 12 interviews from the rural case municipality (the last two were done at one of the private schools). I also participated in teaching activities such as attending meetings, teaching some lessons during a flu outbreak, open school events in the evening, and visiting other cultural institutions. I have included a description of a typical day written during the fieldwork to give a glimpse of how the fieldwork and interviews were conducted.

A typical day would consist of getting up and preparing for the workday at 07:00 a.m. I would normally leave the house at 0750 to attend the daily morning meeting at 0815. I would park at the gymnasium hall and hurry towards the school together with the rest of the employees. The hurry was not only because of time issues; the icy cold wind coming down from two directions made the  $-18^{\circ}\text{C}$  even more chilling. Although the high barometric pressure can give off the impression of the arctic winter as very photogenic with a clear sky and powdered snow with snow crystals at the top surrounded by mountains, and fjords bathing in the first glimpses of the winter sun, the physical sensation was far from this. One could very literally feel the inside of one's nose freeze when drawing the first breath, and the cold wind would make one's face feel numb if one chose to face it.

The school is located in the middle of the town, which is also the municipality centre. The centre is not too big, with some convenience stores (one with a post office), a very good café which doubles as a bar during the weekends, some stores such as barbershops and sports-equipment shops, a cultural centre with a cinema, a health centre, and the town hall. The school looks new on the outside, but it has many entrances, nooks, and corners, as the new-looking school was built and renovated based on the skeleton of an older one. The building itself gives an impression of several architectural styles at once in a rather charming manner. The outer walls are mostly made of wood, with a light stain on some walls and dark stain on others as a contrast. Some of the corridors are slightly narrow, and the indoor walls are mostly white. Several of the offices have glass walls and glass doors, giving the whole school the appearance of a mid-2000s Scandinavian office building.

A typical day would start 0815, with all the teachers gathering in the lunchroom in the middle of the school. The principal would usually lead the meeting. She was relatively new and has only been there for a year. The teachers would sit in groups based on the grade they taught, and this is something the new principal has introduced to make meetings more orderly and effective. The principal would then address the affairs of the day, and the school inspector would discuss the logistics of the day if sick leaves

have been called in. After the obligatory posts, the floor would be open, and the teachers would bring up things that are relevant to them or to the day, such as happenings and specific logistics. At 0830, the teachers would head to their respective classrooms, and the teaching assistants would come in for their meeting. They had started their day slightly earlier to greet the students at the school and to maintain order and a healthy environment before lessons begin.

The work environment seemed to be nice and welcoming, but there were some social boundaries between the teachers and the teaching assistants. To a degree, people mingled with others with similar positions. This may be partly caused by their time schedules not aligning, as shown above. Some teachers also spent a considerable amount of time together, and this seemed to be relatively congruent with where their offices are located within the school. The morning meetings seemed to have an unifying effect, and several of the teachers and assistants expressed that the school leadership took their side in terms of obtaining resources from the municipality.

A major part of my workday was to conduct the interviews and take part in the break-room chatter. I did many of the interviews during the first month or so. The usual scenario was to arrange the interviews in between the lessons, mostly at the start or end of the day. The break-room chatter was also important in terms of gathering data, and this data often enabled me to contextualise some of the interview data or even to bring in new themes for the interviews. The breaks were at 10, 11 and 14, but some teachers might spend some time there in between their lessons. I had an office space close to the break room, and this proved very convenient for recording data, as the teachers would find the break-room chatter strange if I brought along a notebook. The solution was to ask if I could use something when mentioned during the chatter, then remembering it as well as possible, and afterwards hurrying into my office space to write it down. The office was shared with another teacher who was also responsible for IT, and we often sat there and having casual conversations. I also spent some time in the other teachers' offices, and they did the same; they spoke about what they do in their lessons, about students, and about the subjects they teach, among other topics.

The afternoons were often spent recording the findings of the day or being with some of the friends whom I made there. Grønnvik has one of the better martial-arts gyms in the country, and I took full advantage of this as my pastime. I also signed up for one of the local gyms to rehabilitate a knee injury. Sometimes, people at the aforementioned arenas came over to talk about my move to Grønnvik, and, after learning about my project, they sometimes wanted to discuss the subject matter. A typical day was often concluded with a Skype call back home, and, while the weekdays were spent in Grønnvik, many weekends were spent back home.

### **4.3.2 Tromsø: Interviews and former experience**

The data collection in Tromsø consisted of six interviews carried out at one lower-secondary school between May and August 2018. On the surface level, the data-collection process was less comprehensive in Tromsø than in Grønnvik; there were fewer interviews, and participant observation was only carried out in Grønnvik. However, I present some arguments that may moderate this apparent weakness, showing that I possess contextual knowledge to a certain degree before the time of data collection.

Tromsø has been my place of residence since 2011. In addition to being trained as a social anthropologist, I simultaneously received teacher training over the course of four years between 2011 and 2015, culminating in full teaching credentials. This includes more than six months spent as a supervised teacher exclusively at lower-secondary schools in Tromsø. At the same time, I also worked part-time as a substitute teacher at elementary, lower-secondary, and upper-secondary schools in the same municipality. I have also spent a year working close to full-time as an upper-secondary teacher before embarking on this PhD project.

One of the main arguments for undertaking participant observation as presented earlier in this chapter is to gain contextual knowledge that might otherwise be lost. However, I argue that the sum of my personal background could partly compensate for the lack of participant observation in Tromsø. Although it does not provide me with specific observational data from the school where the interviews were conducted, it nonetheless provides plenty of contextual knowledge about education in the municipality as a whole, such as knowledge about the municipality as school owner and about teacher practices, including planning and teaching.

The interviews themselves were collected less organically than in Grønnvik, as they had to be scheduled by e-mail some time in advance. They lasted for about an hour, which is the same length as in Grønnvik, but there are some differences: the time spent with the interviewee before and after the interview was much longer in Tromsø than in Grønnvik.

All the interviews started off with a cup of coffee and some small talk, the teacher informing me about the school and the classes, and I informing him/her about the research project and the technicalities of recording and consent. These were details that made the interviews smoother and more pleasant to conduct for both the interviewer and the interviewee, and sometimes they even informed the interview itself, as issues that needed elaboration would be raised. The time spent after the interview was also longer; when the recorder was turned off, the interviewee seemed

to be more relaxed, and we would sometimes have another cup of coffee. This aftermath often provided data, as the impression of being ‘off the record’ gave room for more informal talks, reflections, and spontaneous thoughts.

### **4.3.3 Conducting the interviews**

The interview material consists of 18 interviews in total, 12 from the rural case municipality and six from the urban case municipality. Both genders are represented in the data material, and the age distribution among the interview subjects is balanced. As described above in the outline, the teachers interviewed for this thesis were recruited based on their availability (such as their time schedules) and their willingness to participate. The interviews were collected with written consent and lasted an hour long on average. They were recorded electronically before being transcribed and analysed using NVivo.

The interviews were semi-structured one-to-one interviews with a thematic interview guide. The interview guide was designed with several objectives in mind. The most important aspect was to capture both teachers’ work experiences and their context, including spatial factors. As this thesis is a part of an international sociological multiple case study, the interview guide was written to allow for an international comparison of teachers’ work experiences. The categories of questions in the interview guide were organised in a similar fashion as those designed for students and parents to facilitate comparison between the different groups within case municipalities as well.

According to Archer, a non-conflating analysis distinguishes between structure, culture, and agency (Archer, 1995: 33ff, 93ff), and the interview guide is divided into several categories in order to cover all three aspects. The first category is (1) general background, including teaching background and motivation. The subsequent categories involve (2) being a teacher at the specific school and place in question; (3) the teaching situation, including that relating to educational policy; (4) leadership; (5) the students; (6) sociological categories that can impact education such as SES, gender, ethnicity, and religion; (7) home-school cooperation; (8) the local community; and finally (9) teacher education.

The semi-structured format of the interview guide, as well as other data-collection methods, also accommodated relevant detours or further probing into topics as they came up naturally in conversation. The hardest challenge was to prioritise during the interviews, as deep probing sometimes meant leaving out entire categories from the interview guide. Nonetheless, the sizeable number of interviews, along with other

data-collection methods, provided data that can be described overall as comprehensive and broad, as well as specific and in-depth.

#### **4.4 Working in familiar contexts; My role as researcher vis-à-vis the informant and research context**

It is fair to assume that my background as a social anthropologist and teacher with a rural upbringing has influenced the research for this thesis. In the history of participant observation, the idea of a distinct other has been implied, as the research has often focused on subjects in far-away geographical contexts, such as in colonial settings (Eriksen, 2010). This idea of otherness is not relevant in all instances, for example in participant observation in one's own culture. Several advantages and disadvantages come with this type of inquiry, especially the double-edged sword of not being a complete stranger to the field. I intentionally utilised my background for my research, as it gives certain advantages. The language and culture are known to a certain degree, and I have a viable, although positioned, knowledge of the field(s), saving time during the design, data collection, participant observation, and analysis of the data.

On the other side, this familiarity with the field can be taken for granted by the researcher, and a complete outsider's ability to spot one's own bias and tacit knowledge may be compromised. Cato Wadel states that the researcher and the people who are researched share much of a body of mutual knowledge (Wadel et al., 2014). This familiarity is very much the case with teachers, as nearly everyone in Norway has attended public school for up to 13 years and therefore has preconceptions about the teacher's role. This issue is further reinforced in my case, due to my background as a certified teacher. The structure of the educational system and the curriculum are not only taken for granted through my experiences as a student, but also as a teacher. Issues experienced as a teacher can lead to biased questions with equally biased answers.

The same familiarity can be applied to a certain degree to my rural upbringing when researching spatial differences in education. Certain issues are also personal experiences (e.g. rural depopulation, geographic distance, and access to services). There is a possibility of overemphasising my own experiences and politicised issues or underemphasising certain points in an attempt to compensate for my own biases. Tacit knowledge can be embodied to the point of being impossible to spot, and all of the above can lead to obscuration of or even missing out on pressing issues. This poses a challenge of *reflexivity* on the part of the researcher, who has to ask questions about him/herself and one's mutual knowledge shared with research participants, and possibly tacit knowledge.

Wadel discusses how researchers try to keep themselves out of their research, at least in quantitative studies. This is difficult in qualitative research and especially in participant observation, where one is, in a metaphorical sense, *one's own measurement apparatus* (Wadel *et al.*, 2014). Researchers conducting participant observation have to 'perform sociology on themselves', and this act becomes even more important for fieldwork in one's own culture, as the metaphorical measurement apparatus comes with an extra bias (Ibid.).

In anthropology, great attention has been paid to *cultural relativism*. Cultural relativism is the descriptive and methodological claim that practices differ among cultures: what is considered wrong in one culture may be correct in another, and understanding must be on their own premises, or from 'the native's point of view' (Eriksen, 2010; Fangen, 2010). This differs significantly from the normative moral-relativist standpoint that one should accept all moral values as long as they are consistent within a specific culture. There are numerous examples of qualitative research on morally dubious practices such as right-wing extremism and violent groups (e.g. Fangen, 2010), as well as genital mutilation (e.g. Talle, 2010), whereby cultural relativism is utilised as a perspective and a methodological tool to gain knowledge. Neither of the two examples above endorses or stands morally neutral to their respective subjects; but both state that, if one wants to combat such perspectives, one needs knowledge about the subject, including the 'native' perspective. Cultural relativism is therefore indirectly important for making informed choices and political policies.

Cultural relativism is also important when there is a difference in cultural background between the researcher and research subjects. Ethnocentrism can cause the data collection and analysis to be lopsided, but it can also inform this thesis. In my research, cultural relativism is utilised as a perspective and a tool to understand and suspend my own ethnocentricity or prejudgement during data collection and analysis, as well as to understand how close I am to the 'native point of view'. Cultural relativism used in such a matter is closely related to being a reflexive researcher, as both imply continuous self-examination in order to not conflate one's own biases and prejudices with empirical observations or research subjects' perspectives. A complete division is probably impossible, but I believe that, if data collection is to be successful, great attention has to be paid to the issues above. Below, I present some strategies used in this thesis that can counteract different forms of confluations that may arise when the researcher has a high degree of personal familiarity with the field of research.

The first strategy addresses an epistemic conflation happening 'within' the researcher; this entails the possible conflation between the researcher's empirical data and the

analysis. When collecting and documenting data, one must attempt to make a clear division in the field notes and diaries between empirical data (such as observations) and what the researcher might think or analyse about the observations (Spradley, 1980; Fangen, 2010). It is a pragmatic strategy used both during the data collection itself and in writing up the research for scientific purposes.

Field notes, both in general and for this thesis, were taken in a stringent fashion with information about time and place, as well as a vertical division on every page; the left side was reserved for observations and quotations that can be used as data material, and the right side for contextual information and immediate analytical thoughts about the data material (Spradley, 1980). The field diary was written every day, and the division between potential data and analytical thoughts were of similar importance here. Empirical data such as observations were written down in cursive, while all other information – including analysis – were in non-cursive. Sometimes, analyses or simple clarifications were added into the observational data, but these were either put in brackets [exemplified here] if short or footnoted if longer. The field diary also consisted of cross-references to the field notes and the interviews, often providing contextual information, simple analysis, and/or clarifications if necessary. As such, the field diary doubled as an index of the data material.

This strategy of division is simple, but almost a requirement for reflexivity. The division prevented at least to some degree the conflation between factual events, as well as one's own biases, prejudices, and the immediate analysis. It enabled me to reflect at a later point upon the data and the mutual knowledge between myself and the people I met during the data collection. It also made possible a reinterpretation of the material at later points in time in ways that a conflated type of writing would not. Furthermore, it facilitates academic writing, analysis and discourse, as one does not have to untangle analysis from the data material.

The second strategy addresses another epistemic conflation: the possible conflation between the *emic* (or research-subjects' perspectives) and the *etic* (researchers' perspectives (Harris, 1976). This conflation is bi-directional; the researcher can assimilate the perspective of his or her informants and become an extension of them, or s/he may project his/her own preconceptions onto the informant perspective. The latter also relates to the conflation between empirical data and analysis mentioned earlier. The strategy I used to avoid this is a pragmatic one, and it is simply to be conscious of the relationship between the researcher and the research subjects. A way of doing this is to slightly hold back the degree of participation at the start of the project in order to obtain an overview of the field. A high degree of participation right from the start can hinder the researcher from being able to differentiate between the



researcher's etic and the subject's emic perspective (Harris, 1976). In addition, reversing the degree of participation is difficult (although not impossible). The reason is two-fold; the researcher cannot un-experience what has been experienced (although reflexivity can and should be applied), and it is important to keep in mind that early acquaintances and early observations may affect the course of the rest of the data collection in ways that are unpredictable and, in the worst case scenario, incorrect and irreversible. Furthermore, the degree of participation gives the researcher a social position among his/her informants that might be undesirable or even difficult to reverse on a personal relational basis; distancing oneself from the informants in the midst of data collection may be interpreted as artificial and strange. The strategy of withholding the degree of participation is therefore a good strategy for both obtaining an early overview and avoiding the problem of either unconsciously becoming a spokesperson for a field that one is familiar with or interpreting data to fit with one's own preconceptions.

It is important to note that, although this fieldwork was done within my own culture, there were also some differences that made my position somewhat of an outsider's. My country of birth is the Philippines, and my West-Coast Norwegian dialect is distinctly different from the ones spoken in Northern Norway. Both of these factors, on top of being new to a small place, made it evident that I was not a local, and it is fair to say that I stood out in many ways. The position of simultaneous insider and outsider might have been helpful in avoiding the conflation of the emic and etic perspectives.

The problem of being one's own measuring apparatus in qualitative research continues into writing, and the same conflations that were problematic during data collection still apply. However, writing automatically opens up another pragmatic reflexive strategy: comparing one's own data with other literature on the subject and enquiring about the results of this comparison. Asking 'how' and 'why' one's own analysis is similar to or different from others' can be valuable for gaining knowledge about one's own data collection, illuminating blind spots, and improving later efforts. One can argue that this is a core component of academic writing, but if the similarities or differences are less spectacular, this enquiry and possibility for reflexivity can be overlooked when positioning one's own research in agreement or disagreement with other studies.

The three strategies above illustrate Wadel's point about 'doing sociology on oneself' (Wadel et al., 2014), as the act of qualitative research is not simply to collect data, but also to problematise the research instrument of oneself as a researcher. I have experienced the practice of reflexivity as a splitting of oneself into both an actor and observer of the social situation one is a part of. There is also a split within the mind ; a

splitting of oneself as both actor and observer, and of one's analyses and biases. The degree of this splitting of oneself is of course varying in intensity, but it is nonetheless demanding. The subjective feeling best suited to describing it is one of intense multitasking: performing data collection simultaneously as one practices reflexivity. I found it a daunting and sometimes bizarre task, as reflexivity is – at least for me – a near-constant untangling of relatively objective observations and the subjective thoughts about them. It is nonetheless necessary to perform and document the reflexivity in order to provide transparency and, by extension, facilitate a possible discussion on validity, reliability, and ethics.

#### **4.5 Ethical considerations for my project**

There is a clear asymmetric power relation in interview situations and participant observations. Power is often skewed in the researcher's favour, as the researcher(s) define the interview situation; the interview is a one-way dialogue with imbalanced reciprocity, and the dialogue may be manipulative. Furthermore, the interview is an instrumental mean to a research-related end, and the researcher has a monopoly over its outcome; in a way, participants lose control over the representation of the data material as soon as they part ways with the researcher and the data collection ends (Kvale, 2016). This power over representation is a serious responsibility, and part of the way to address it is by doing methodologically sound research.

A responsible researcher reflexively takes care to avoid the dangers of different types of conflation as outlined earlier in this chapter. The earlier sections argued that the representation becomes inaccurate if researchers are unable to separate data material – be it observational or interview data – from their own thoughts about it. The representation can also be inaccurate if researchers are unable to distinguish between their own perspectives and those of the participants. This is also ethically questionable; representing someone in an (probably unintentional) untruthful manner due to a lack of methodological proficiency is morally very difficult, or perhaps even impossible, to defend.

The rest of the ethical concepts and challenges presented in this subchapter are those found to be most relevant and challenging during the work on this thesis. These include a discussion on consent, as well as the balancing act between consent and confidentiality on behalf of the research participants and research interest. A section is also included to problematise any research footprints that the researcher may leave.

One of the most common ethical concepts in social science when collecting data among people is the concept of *informed consent*. Informed consent means that the subject for the data collection has a right to know what they consent to, and s/he has a

right not to consent or to withdraw at any point in time (Spradley, 1980; Fangen, 2010; Den nasjonale forskningsetiske komite for samfunnsfag og humaniora, 2016). The research project RUR-ED, including my PhD work, has been endorsed by the NSD (Norwegian Centre for Research Data; see Appendix for more information). A prerequisite for and consequence of such an endorsement is that data collection included a written form of consent followed by written information about the project, and that the collected data should be stored and treated according to NSD guidelines.

Another concept of research ethics in social science is confidentiality and the related concept of anonymisation. Confidentiality in this context is to not publicise data that may compromise the personal identity of the study or project participants (Fangen, 2010). The national research ethics guidelines state the following: *‘Personal data must normally be de-identified, while publication and dissemination of the research material must normally be anonymised. In certain situations, researchers must nonetheless balance confidentiality and the obligation to notify’* (Den nasjonale forskningsetiske komite for samfunnsfag og humaniora, 2016). The reason for mentioning confidentiality and linking it in with consent is that the participants were given a promise of confidentiality by myself and the other researchers in the project when obtaining their consent. A violation of confidentiality may lead to clear consequences for the participants. While a philosophical discussion of moral good and bad is beyond this paper, I insist that a violation of confidentiality is untenable for my kind of research.

#### **4.5.1 The balance between participant confidentiality and research interest**

Confidentiality is a good entry point into a discussion of the balance between the rights and needs of the participants and confidentiality on one side and research interests on the other. This balancing act is often not straight-forward, but, in the case of this thesis, there is at least a seeming convergence of informant and research interest in a spatially just educational system. In my view, both ethical guidelines and literature on qualitative methods in social science are quite vague on how to solve this specific problem, but they are very clear about which side one should choose as a researcher if faced with such a problem.

On confidentiality, NESH states the following: ‘When researchers promise confidentiality to participants, the pledge implies that the information will not be passed on in ways that can identify the individuals. Both the credibility of the researchers and the participants’ trust in research are closely linked to confidentiality’ (Den nasjonale forskningsetiske komite for samfunnsfag og humaniora, 2016). Similarly, according to Spradley (1980), if faced with such a situation, one should

choose the side of the participants. Katrine Fangen (2010) notes that some researchers have gone to jail rather than parting with confidential information regarding research participants.

NESH also states that ‘researchers are responsible for ensuring that participants are not exposed to serious physical harm or other severe or unreasonable strain as a result of the research’ (Den nasjonale forskningsetiske komite for samfunnsfag og humaniora, 2016). It is not difficult to imagine that unreasonable psychological strain can be a likely consequence if a participant who has given data containing criticisms of local politics or institutions were to have his/her identity disclosed. The sentiment of not doing harm is similar to the Hippocratic phrase and ideal ‘*primum non nocere*’, meaning ‘first, do no harm’ (Roddy and Jones, 2002). According to ethical guidelines, literature on research methods, and Hippocratic ideals, it is clear so far that we as researchers should take the participants’ side, even if it has consequences for the quality of the analysis.

One specific variant of the balancing act is especially relevant to my PhD thesis; the research interest in geographical place versus the confidentiality of the participants. This thesis focuses on spatial inequality in education, and there is a need to illuminate context and unpack the types of places that the case municipalities are in order to address spatial inequalities. Examples of interesting aspects include – but are not limited to – population size, geographic location, religion, ethnicity, socioeconomic status, occupational composition of the population, and the historical background of the place. A deep discussion of these factors can facilitate a triangulation that may compromise not only the places of data collection but also the profession, gender, age cohort, ethnicity, and work place of a participant, among other factors. In the end, this may facilitate a triangulation that identifies specific teachers or students. In such a situation, it may not matter if the researcher assigns pseudonyms to the participants; in an age of social media, this possibility for triangulating individuals may be available in anyone’s pocket at any given time. In order to address this balancing act, I now present the specific ethical choices made in this thesis to address the triangulation issue.

The identity of the urban case municipality, Tromsø, is disclosed as the residing place of the author. The disclosure is defensible simply by scale. There is a significant number of lower-secondary schools and teachers in the urban case municipality; as long as the school where the teachers are working remains undisclosed, contextual data about the municipality can be provided, and both the school and the teachers are granted the anonymity and confidentiality they were promised.

The rural case municipality is different; it was given the pseudonym ‘Grønnavik’, and greater efforts were made to safeguard the identity of this place and its research participants. Great effort was put into disclosing just enough contextual info in order to describe the place without giving away too much. Disclosure of place identity, as well as individual identity markers such as gender and age of the participants, can lead to direct triangulation of both students and teachers. Facilitating a triangulation of critical voices leading to harm against the person behind the critical voice would mean a breach of promise on confidentiality, and it is therefore untenable. Other members of the research group are investigating student perspectives in the same case municipalities, and the same issue in disclosing place identity applies.

#### **4.5.2 Bringing back results and leaving a research footprint**

A research footprint involves not only the disturbances made by a researcher and his/her methods and enquiries, but also the long-lasting ripples and repercussions of the relationship between him/her and the research participants and community. This footprint may vary in size, and it may be both disadvantageous and beneficial to the research participants (Kvalsund and Hargreaves, 2014). Although an everyday presence of a researcher in itself leaves some traces of a footprint, presenting research results is an even more precarious intervention. Presenting results also includes the presentation of the analysis, and, along with it, theory. The research presentation itself runs the risk of altering the perceptions of the research participants, the researcher-participant relationship, as well as future research with these participants by leaving a theoretical and analytical imprint from an external expert system (ibid.).

Conducting participant observations and qualitative interviews means being reciprocally involved with the research participants, and one expectation is that participants may be interested in the results of the research that they have taken part in. Answering this expectation is ethical in the sense of giving back in a reciprocal relationship, and the participants also have the opportunity to respond to the results of their consent, opening up the possibility of any alteration or correction to the research if necessary. There is a caveat here, as the researcher runs the risk of leaving a footprint not only through day-to-day interaction, but especially in bringing back research. This has also been the case of this PhD, where I brought some results back to the participants in the rural case municipality about 18 months after the data collection.

The results were brought back as a presentation of the articles in the thesis. The participants who voiced their opinions mostly agreed with the research results. This was unsurprising, as a large part of the research was based on data collected from these participants, and efforts were made to present the data in a clear and concise

manner. The presentation did, however, create a research footprint in an unexpected way, as its focus on structural properties such as demographics and educational funding policy, as well as its demonstrable impact on the funding of their school, resonated with the participants. The school owner (the rural case municipality of Grønnavik) was once again in a situation of budget cuts, and an unintended consequence was the realisation that the teacher density was higher than the legal minimum standard. The municipality used this as a rationale to cut teaching positions. The research presented provided an argument to push back against the school owner using a theoretical framework and analysis, as well as documentation on the poor funding situation of the educational sector in Grønnavik.

The example above shows that the research footprint can be managed to a degree, although never completely, and research results should therefore be thoughtfully presented in a manner and language that makes sense to the participants, with the highest degree of transparency possible and open to locally meaningful interpretation. The distinction between the emic and etic perspectives was already mentioned earlier in the chapter (Harris, 1976). While this distinction is important to uphold for methodological reasons, the researcher still needs to ensure reflexively and check with research participants that the potential footprint is fair and acceptable to them. In this case, it entails a sharp and clear division between empirical data, theory, and analysis, so that the participants can clearly distinguish the parts and interpret the results themselves in a locally meaningful way (Kvalsund and Hargreaves, 2014).

## 5 Summary and main findings in Articles 1–4

This chapter gives an overview of the work presented in the four articles included in this thesis. Collectively, they address different parts of the overarching research questions presented in the introduction:

- (1) What are the work experiences, constraints and enablements that teachers experience in different spatial contexts, and are there spatial inequalities?
- (2) Are the structural properties that constrain and enable teachers (and students) in rural areas in a state of change or reproduction?
- (3) How can these structural properties be changed for a more spatially just education system?

The first research question is empirical, and different aspects of this question are addressed in the first three articles. The second and third research questions are partly answered in the articles, and they are discussed and elaborated further in the analysis chapter.

The order of the articles is not coincidental, and the sequence of the first three articles is to start with the rural case municipality Grønnvik in Article 1 and expand the horizon through a specific comparison between Grønnvik and Tromsø in Article 2, followed by a broader comparison between the two case municipalities in Article 3. Article 1 investigates education and the local educational system in the rural case municipality, as well as how two specific historical and structural aspects have influenced and constrained the local teachers' work experiences. Article 2 takes a policy stance in comparing the two case municipalities in terms of constraints and enablements experienced by the teachers in the creation and enactment of local educational content and curriculum. Meanwhile, Article 3 has a broader focus, as it categorises and compares the main structural differences between teachers' work experiences in the two case municipalities. Note that while Article 2 is published in a peer reviewed journal, and Article 3 and 4 is reviewed and accepted as chapters in an academic anthology, all articles are referred in the form of *Article N* (e.g. Article 1) in this thesis. The reason for this naming is the order of the articles explained above; their time of publication does not coincide with their order of presentation in this thesis.

Article 4 is slightly different from the first three articles; although it focuses on spatial inequality in education, it draws its data material from the student perspective in another rural case municipality of the same region, as well as in Tromsø. It examines student transitions between lower- and upper-secondary education by investigating the connection between structure and agency on an individual level. It is relevant to the

parts of second research question, as well as the third research question (in particular on unequal structural conditions), arguing that reflexivity and opportunity structures are important to understanding student transitions.

Articles 1 and 3 were written by the author of this thesis as sole author. Article 2 was co-written with Professor Unn-Doris Bæck as co-author, and Article 4 was co-written with Anna-Maria H. Stenseth as first author and Daniel Rød as co-author.

## **5.1 Summary Article 1: On Teacher Work Experiences in a Rural Case Municipality in Northern Norway – Consequences of a Lack of Resources, School Closures, and a History of Ethnic Assimilation**

Author: Daniel Rød

The first article (Rød, unpublished 2020) is currently in a review process in an academic journal. It explores the structural constraints on teachers in a rural case municipality in Northern Norway. The analysis is based on qualitative interviews with teachers and participant observations, predominantly within a school environment in 2018, in the case municipality Grønnevik. The main finding is a lack of resources caused by the Norwegian municipal funding system and rural demography, leading to a shortage in education materials, school closures, and distrust towards local politicians in the case municipality (Solstad and Thelin, 2006; Solstad, 2009; Solstad and Andrews, 2020). According to the teachers, the lack of resources has affected the offerings provided to their students. The paper also suggests that the lack of resources should be understood with reference to the local context and history, in this case the assimilation of the Sami and the Kven, which was official policy between 1850 and 1950.

The main theoretical framework for this paper is parts of Archer's morphogenetic approach (Archer, 1995), further substantiated especially by her typology of the centralised and decentralised educational systems (Archer, [1979] 2013), as well as Solstad's argument on the effects that changes in municipal funding reform have on rural education and the increase in rural school closures (Solstad and Thelin, 2006; Solstad, 2009). The analysis illuminates the role of the centralised educational system in both processes and shows a need for a more place-sensitive policy in education. This includes the funding system of schools through municipalities, and the article points out that educational change in the centralised Norwegian educational system is mostly effected through pressure on the leading group of central politicians in the national parliament. While the analysis is specifically tied to one specific case study,



both ethnic assimilation politics and economic adversity facing rural schools are well known not only in most of Northern Norway but also elsewhere in the country.

## **5.2 Summary Article 2: Structural enablements and constraints in the creation and enactment of local content in Norwegian education**

First author: Daniel Rød. Second author: Unn-Doris K. Bæck

The second article by Rød and Bæck (2020) explores some structural enablements and constraints tied to teachers' opportunities to make use of local content in the curricula of lower-secondary schools in two case municipalities in Northern Norway. The article also investigates rural-urban differences, as curriculum is often created with an urban bias. One finding of this paper is that the design of the national curriculum allows for local content based on its competence aims. The idea is to allow individual adaptation for students to ensure attainment of the competence aims. This serves as an enabler for teachers to create and enact local content in education. However, several constraints limit local adaptation for teachers: time pressure, lack of access to content due to finances and distance, and losing school control of local curriculum. These constraints also seem to have a different impact depending on geographical context, as the same funding system may yield very different results on material resources.

This article continues in the same theoretical field as the first article, as it employs Margaret Archer's theories on centralised and decentralised educational systems to analyse these structural enablements and constraints (Archer, [1979] 2013). The paper offers a structural explanation of why the enablement and constraints in creating and enacting local content and curriculum have emerged by exploring the structure of the educational system itself. Archer's concepts of centralised and decentralised educational systems allow us to understand why and within which structures the constraints have surfaced, as the power relationships in a centralised or decentralised system direct how educational change (or reproduction) can happen (Ibid). This paper also includes Solstad's insights presented in Article 1 in order to examine the spatial inequality in the economic and material context that has emerged in the centralised educational system in Norway (Solstad and Thelin, 2006; Solstad, 2009; Solstad and Andrews, 2020).

Furthermore, the article suggests some research-based ways to address the factors that constrain teachers' opportunities to create and enact local content and curriculum. Part of the time pressure can and potentially is being dealt with through central negotiations for new educational reforms (e.g. reducing the number of competence aims). Economic inequality can also be managed through central negotiations with the

funding system of school owners, in this case municipalities. In the Norwegian case, this can be addressed, for example, by expanding the discretionary funds given to county governors. The last category of constraints, losing school control of local curriculum, is the most fleeting, because it may not exist in the exact same form across municipalities. However, the paper suggests some possible compromises on the local level that may address this problem.

### **5.3 Summary Article 3: Structural Constraints on Teachers' Work: Comparing Work Experiences in Rural and Urban Settings in Northern Norway**

Author: Daniel Rød

The third article by Rød (upcoming 2021) discusses differences between teaching in rural and urban municipalities in Northern Norway, comparing work experiences and especially constraints on teachers' concerns between Grønnevik and Tromsø. As such, it encompasses Articles 1 and 2, painting an even broader picture. The teachers all view delivering high-level education and ensuring student well-being as their main concerns. This concern has encountered different constraints based on geography, and these constraints are sorted into three categories: (1) lack of economic resources, support functions, and cultural institutions; (2) different levels of involvement by the municipal school owners in their schools; and (3) uneven supply of qualified teachers.

The first category, economy, is investigated in Articles 1 and 2, but the focus in the first article is on the rural municipality; while the second article compares the two municipalities, it does so in a very specific manner. This article makes the comparison broader, and it also establishes a link between municipal economy, funding policy, and the second category, which is the municipality as a school owner. The third category is also discussed. While the problem of recruiting and retaining teachers is a well-known rural issue, it is not as visible, although still present in the rural case municipality in this paper.

This paper is congruent with the first other two in that it also utilises Archer's centralised and decentralised educational systems as a theoretical starting point in analysing the above constraints (Archer, [1979] 2013). The main finding of this paper is that many of the abovementioned differences are traceable to the centralised educational system, and/or rural demographic issues. As discussed in the first two papers, the Norwegian educational system is centralised in terms of power distribution, with highly unified funding models, educational laws, and curricula. In combination with the rural depopulation of people of working age and resulting demographic profile, these two factors are found to be causes of many differences (and problems

that poorer rural municipalities face). This goes for both economic differences and differences of perception among the school owners, as the political-manoeuving space for school owners is tied to the economy, which in turn is tied to both local rural demography and the centralised educational system with its push towards unification. Lastly, access to qualified teachers is somehow related to demographics and the larger issue of a general lack of teachers nationwide, as well as rural depopulation of working-age people.

#### **5.4 Summary Article 4: Reflexivity and educational decision-making processes among young students**

First author: Anna-Maria H. Stenseth. Second author: Daniel Rød.

The fourth article by Stenseth and Rød (upcoming 2021) discusses educational decision-making processes among Norwegian students in the transition from lower- to upper-secondary education. The data material is based on student interviews and therefore different from the rest of the data in this thesis. The article argues that the concept of reflexivity and different reflexive modes can be used to advance the understanding of how young people make their choices within existing opportunity structures for educational options and future work opportunities. The article argues that Margaret Archer's work on reflexivity can provide good insights on these decision-making processes, as it encompasses culture, structure and agency, and interactions between the two over time (Archer, 2007).

This article differs from the three above it; it addresses spatial inequality in education from the viewpoint of the students and not the teachers. It reveals two points: (1) individual agency does to a certain degree impact the educational trajectory. The analysis suggests that the educational system favours certain dominant modes of reflexivity over others, which may again affect future social transitions. The educational system seems to favour autonomy; as such, it favours the autonomous reflexive. However, this happens within a context that provides affordances and rewards for certain actions. In this case, students are placed by or against their will into a system that is not of their own making, namely the centralised educational system. We also found that (2) opportunity structures, meaning access to work and education, represent barriers to potential individual educational trajectories/projects regardless of the dominant mode of reflexivity. The centralised educational system shapes parts of the opportunity structure, as it specifically decides the upper-secondary offerings and their accessibility. Place matters; rural areas give the students worse access to education and certain types of work, and differences between opportunity structures by place raises the question of spatial equity.

## 6 Analysis

This thesis highlights the work experiences of teachers and spatial inequalities in education based on place of residency. Furthermore, it identifies structural properties that both enable and constrain teachers and students, but doing so differently depending on whether one is situated in a predominantly rural or urban context. This final analysis chapter adheres to the genre of an article-based PhD thesis; its aim is to summarise and analyse the four articles, taking the discussion to a higher level of analysis. This chapter clarifies the contribution of the single articles taken together as a whole, and it also analyses them beyond the content of the articles themselves. First, I revisit the research questions from the introductory chapter:

- (1) What are the work experiences, constraints and enablements that teachers experience in different spatial contexts, and are there spatial inequalities?
- (2) Are the structural properties that constrain and enable teachers (and students) in rural areas in a state of change or reproduction?
- (3) How can these structural properties be changed for a more spatially just education system?

I contained in the introduction and in chapter 5, that the articles and the thesis summary answer different parts of the research questions, both empirically and analytically. Unsurprisingly, the articles as summarised in chapter 5 contained that there are spatial inequalities in education, and, in the case of this thesis, the rural case municipality came out worse than the urban case municipality.

This chapter focuses especially on elaborating on the second and third research questions: whether the structural properties that affect rural education and its teachers (and students) are in a state of change (morphogenesis) or reproduction (morphostasis), and if there are ways to address the constraints affecting the teachers and students in rural areas.

*Rural education* has not been stringently defined so far in this thesis. This analysis is concerned with the work experiences of teachers, and, when referring to rural education in this analysis, it first and foremost refers to the teachers and students at a local level. It also includes the local school, school owner, and local community to some degree, but as we will see, at least the local school and school owner are also part of the state educational system. In order to answer the research questions, the analysis chapter starts with a revisit of the theoretical framework of this thesis and my intentions for its use in this chapter. The rest of the layout is presented afterwards.

## 6.1 Revisiting theory

The reason behind the choice of Archer's theories over others for this analysis has only been implied, but not clearly expressed, up until now. One reason that Archer's approach to social science works well with this analysis is its solid ontological foundations. A certain degree of naturalism is necessary in speaking about current-day issues such as unequal resource distribution, climate change, globalisation, and – most recently – pandemics. This also includes the position of education vis-à-vis these issues. Of similar importance is a certain degree of interpretivism. The interpretivism is needed to acknowledge that both society and social science are full of people who live in it; it is in large part socially constructed, and the product of people's actions in the past. Another of Archer's main points is the inclusion and separation of *structure*, *culture*, and *agency*, and not giving priority to one of the three *a priori*. A solid ontological foundation makes it possible to divide social reality into layers that are irreducible to each other: structure cannot be reduced to agency or vice versa, nor can both be centrally conflated into one. In addition, the inclusion of all three is a good fit for discussing how structure affects people without determining them (Archer, 1995: 195-196). The analysis takes this idea further, illustrating its aptness as a framework for understanding what these structures are, the imbalances that lead to injustice, and their effects on people, in this case teachers (and, implicitly, their students) in rural areas. What I am about to present is a use of Archer's morphogenetic approach, especially the morphogenetic cycle as presented in the theory chapter, to answer the research questions. An illustration of the model is given below to refresh the reader's memory (Figure 4).

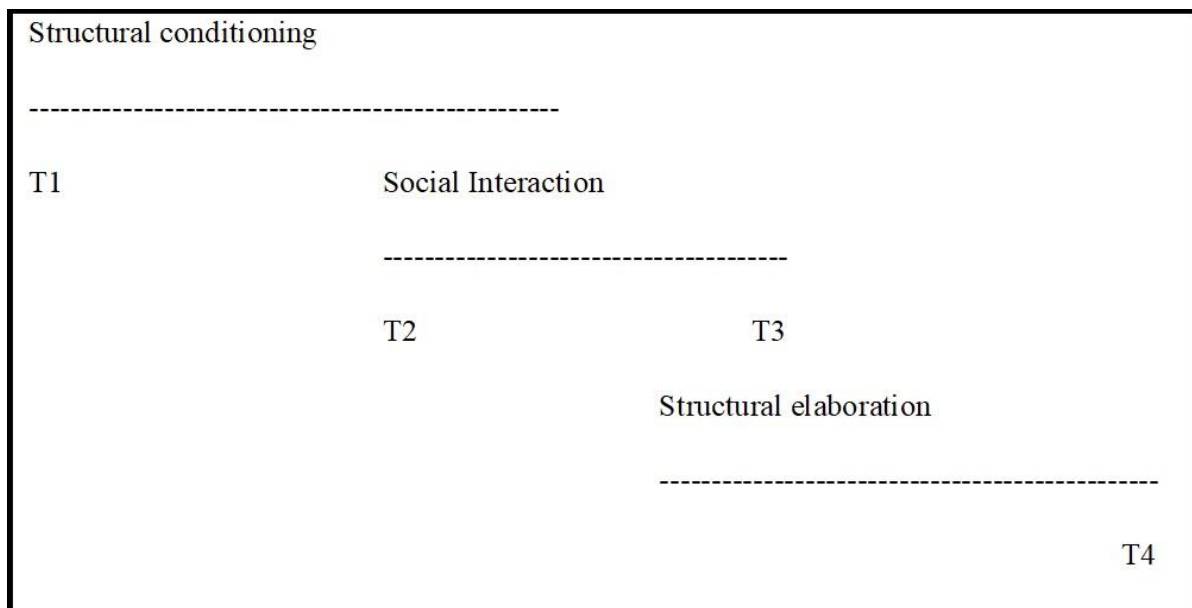


Figure 4. The morphogenetic cycle (Archer, 1995: 77-79, 157)

First, the analysis (re)introduces the agents who are relevant to this analysis. It then follows the different structural and cultural properties that affect and shape the situations that the rural teachers in Articles 1 to 3 and agents on a national level find themselves in. The structural and cultural emergent properties that both condition the rural teachers and students, as well as agents on a national level, are at T1 in Archer's model, and they are sorted into first- and second-order emergent properties. Second-order emergent properties do not have any *a priori* priority over first-order emergent properties or vice versa in terms of constraining or enabling agents or people who inhabits the system, as this is a subject that needs to be empirically established on a case-by-case basis. This does not mean that the first- and second-order emergent properties are subjective, as they exist regardless of the knowledge or interpretation of the agent or person who encounters them; agents and people may be unaware, interpreting them differently or even misconstruing them.

It is important to note that many of these properties originate from – and can only be changed on – a national level. The consequence is that the morphogenetic cycle, with its interaction and elaboration, is only applied on that level. The distinction between levels is discussed in a separate section after introducing the agents.

After investigating the conditioning at T1, I explore the social interaction between T2 and T3 and discuss whether the agent interaction between T2 and T3 has led to morphostasis or morphogenesis of the structural emergent properties at T4, with T4 as the time of writing this analysis, which is 2020. At the very end, I discuss how especially the teacher profession may introduce changes between T2 and T3 in order to potentially reach a better situation for rural teachers and students at another T4 in the future; this includes specific policy implications.

Lastly, I repeat that the analysis is interested in unequal structural conditions in education based on place of residence. The structural and cultural properties, agents involved, their interactions, and possible policy changes proposed in this analysis are therefore geared specifically towards spatial inequality in education, with the teacher profession, rural teachers, and rural students as the main foci of interest. This is only a subset of the general subject of educational inequality, and the analysis may or may not be applicable to other types of injustices within the field of education.

## **6.2 (Re)introducing the agents**

Before introducing the structural and cultural conditions, it is necessary to recapitulate *whose* interactions these conditions affect. These are presented shortly below, with a short explanation and a pointer to the articles in which they appear in. Note that many of these agents correspond to those within Archer's centralised education system

(Archer, 1984: 118; [1979] 2013). Archer's division between primary and corporate agents as discussed in the theory chapter still applies. Corporate agents are collectivities with an active and articulated interest in a given subject; they have the resources and are in the position to do anything with it. Primary agents may be disgruntled or discontent with a situation, but without organisation, any active and articulated interest in a given subject, and/or the resources and positions that corporate agents have (Archer, 1995: 259).

The first agent is *the teacher profession*. Teachers are, as the thesis title and research questions imply, the most important corporate agent and the protagonists in this analysis. In Norway, the teacher professionals are organised into unions, with the Union of Education Norway (Utdanningsforbundet) as the largest organisation. While they technically are several different unions, they are treated as one agent in this analysis, as they often cooperate in their efforts. As shown in the theoretical chapter, the importance of teachers and the teacher profession in any educational system is underscored by Archer, who argues that teachers are one of the main agents within education, not only through their necessary relation to the students, but also as instigators of change within any educational system, although more so in a decentralised system than in a centralised one (Archer, 1984: 92, 101-111). The methodological chapter further argues that the teacher is imperative for student attainment (Stronge, 2010). The teaching position is also a unique one, as it is in the middle of a relational web of agents with an interest in education (Barter, 2013). The data material in the articles concerns teachers' work experiences and investigates the situations of both rural and urban teachers and spatial inequalities between them. Rural teachers, a subsection of the teaching profession, are of particular interest for this thesis, and they are the ones subjected to the structural and cultural constraints and enablements presented later.

The second major corporate agent not only within the Norwegian education system, but also within the subject of spatial inequality in education, is the *central government*. The central government are sectioned, and only a few of these sections are directly concerned with education. The most important sections for education are the Norwegian Parliament and the Norwegian Government, which pass legislation and execute national educational policy. The Ministry of Education and Research and The Norwegian Directorate for Education and Training administer and operationalise educational legislation, policy, and funding. Further down the chain are the local school owners, who are responsible for operating the schools in accordance with the conditions set by the levels above. Municipalities are the local owners of kindergarten, elementary, and lower-secondary schools, while counties are responsible for upper-

secondary education, and the state is responsible for higher education. However, policies that concern one ministry or department may very well impinge on another, as the concerns of ministries and departments often overlap. For example, the municipal economy is simultaneously a concern for the Ministries of Local Government and Modernisation, Finance, Education and Research, and Health and Care Services, among others. It is necessary to note that, although the central government is considered one agent here, the different sectors within may be at conflict with each other or within (e.g. differing interests between ministries or between/within political parties in government and/or parliament, or conflicts of interest between the government and counties or municipalities). The central government play a role directly or indirectly in all four articles, especially in the ones discussing the centralised educational system.

The third agent, only briefly discussed in the articles, is a set of external interest groups: *supra-national and international organisations with an interest in education* such as the EU or the OECD. The latter, especially, have affected Norwegian politicians and education in general through their reports on Norwegian education (Smith, 1989) and their international testing regime system, PISA (Skinningsrud, 2014). The influx of global ideas such as new public management/management by objectives/neo-liberalism into education is often associated with the EU, OECD, WHO, and EES (Solstad, 2009; Solstad and Andrews, 2020), but for this thesis, the OECD are the most interesting. Their role as a corporate agent in light of the spatial inequality in education is indirect, as their main role in this analysis is through their impact and funnelling of global ideas into Norwegian education in general.

Archer's model of education systems does not completely encompass these 'new' actors on the block as of now (Archer, [1979] 2013). This challenge was briefly introduced in the theoretical chapter. A possible approach is to either introduce these new agents as a whole new category that influences the central government in both decentralised and centralised educational systems; the argument of giving them a category to themselves lies in their supra-national reach. Another possibility is to put them into the existing category of *external interest groups*. I maintain that significant work has to be done to explain the role that these new institutions play in shaping the educational system, and that is beyond the scope of this thesis.



The fourth agent in this analysis, *FUG*,<sup>5</sup> has not been introduced in the articles as of yet. FUG are a Norwegian parental interest organisation for children in elementary, lower-secondary, and to some degree upper-secondary education (Foreldreutvalget for Grunnsopplæringen, 2020). Following Archer's models of different educational systems, FUG are sorted within the category of external interest groups, although this status could be debated, as the organisation formally sort and receive their funding from the Ministry of Education and Research and the Norwegian Directorate for Education and Training, and their members are appointed by the King-in-Council. The reason for including FUG here and as an external interest group is because of their considerable large membership, which includes parents with children in education. Another reason is that FUG have voiced an interest in spatial inequality in education, specifically rural education, in communication with RUR-ED. As such, they are considered a corporate agent in the context of spatial inequality in education, although a small one in their current form.

The fifth agent found in the articles is *students*. A rationale for the existence of education systems is that the students, as recipients, can access knowledge that can benefit both the individual student, the collectivities that they are a part of, and society as a whole. The literature on spatial inequality in education is especially concerned about students, as their unequal attainments based on place of residence are a main concern for both individuals and marginalised communities. This thesis is, for the most part, concerned with teachers, but Article 4 discusses student educational trajectories. However, students as a group are mostly primary and not corporate agents in this analysis, even though student councils exist at all schools, student interest organisations exist, and individual students act with interest and in reflective manners about their own educational trajectories. Although students are given a less prominent place than teachers in the rest of the analysis, they are in a necessary relation to the latter, and the focus on spatial inequality from the teachers' perspective is therefore implicitly about students as well.

There are also other agents involved in the field of rural education. Those are, however, mostly there as either primary agents or as agents without a corporation that matches any of the abovementioned actors. Most operate on a meso-level below the national level.

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<sup>5</sup> FUG is an abbreviation for Foreldreutvalget for Grunnsopplæringen, which roughly translates to the parental committee for basic education (elementary and lower and upper secondary).

The first example is the municipalities as *school owners* and individual *schools* affected by spatial differences in education. It is true that both teachers and students have their everyday work within the institutional framework of a school. Many of the issues raised in the articles (e.g. economic issues in rural municipalities) not only limit teachers and students, but they actually impinge on the entire school. It is equally true that the school owners have some autonomy; it is they who decide on the funding for individual schools, for example. Articles 1 to 3 all illustrate that school owners matter to the conditions that teachers work under. However, neither school owners nor the individual schools seem to be a helpful analytical unit or agent for use in this analysis, as this analysis is interested in structural properties that originate from a national level. They are mostly dwarfed by the centralised education system and its subsections, the teacher profession, and external interest groups, and their say in creating change is limited. In addition, both school owners and schools are heavily tied in with the educational system itself, as they are a part of the Norwegian centralised education system. A probable exception would be a situation whereby a school finds itself in a conflict with its school owner, or the school owner is in conflict with departments and ministries (e.g. over economic issues such as closure, budgeting, or staffing).

A similar fate can be ascribed to *local communities*, which contain the individual schools affected by spatial differences in education, especially those that experience school closures and consolidations. These local communities often operate as corporate agents when in conflict with the local school owner; they are capable of mounting a significant opposition and sometimes even emerging victorious in situations tied to education, including but not limited to school closures. An example of this is found in Article 1, although the local community found themselves unable to stop the school closures and consolidations. However, a general status as a corporate agent is not always given even in these situations, as not all communities organise themselves and remain primary agents. In the context of spatial differences in education, these local communities are not organised together in a way that enables them to be reasonably treated as a corporate agent in the analysis presented in this chapter.

### **6.2.1 A comment on the different levels**

Below is an illustration of the different levels of agents and where they reside in terms of social strata or societal level. This relates to the point about emergence and layers of society, as discussed in the theory chapter (Archer, 1995: 14). It also relates to the illustration of the centralised educational system presented in the same chapter (Archer, 1984; [1979] 2013). In a way, it is a re-illustration of the centralised education system shown in the theory chapter, accentuating the different levels in the

Norwegian context, where the accentuation of hierarchy comes at the cost of obscuring the power relations and their interaction within to some degree.

1. Globalisation trends impact national decision makers through supra-national organisations such as OECD.
2. The central government, especially the national parliament in this case, decides the educational policy in a centralized system. The teaching profession (represented by teachers' unions) and external interest groups such as FUG attempt to influence politicians in parliament. Policy is then carried out by relevant ministries and departments. Note that most corporate agents in a centralized system operate here.
3. School owners (in this case municipalities) operate their schools according to the relevant policies such as funding or curriculum. In some way an extension of level 2, although some autonomy applies.
4. Teachers (who may organize themselves through teachers' unions) teach students in schools within the framework set by the above levels.

*Figure 5. Illustration of levels in the Norwegian educational system*

Levels 1 and 2 are both macro-levels, but the former is supra-national and the latter is national. Most of the relevant education policies are decided at level 2, as Norway has a centralised educational system. Level 3 is the meso-level, and, in terms of education, it is somehow closely tied to level 2; in some ways, level 3 is a bureaucratic extension of the centralised educational system at level 2, although some autonomy exists. At the very end is level 4, which is a micro level where teachers and students reside.

The first- and second-order emergent properties presented below were retroduded from teachers' work experiences in one rural and one urban case municipality at level 4.

*This thesis is especially interested in the rural teachers at this level.* However, as we have seen, many of these properties originate from various strata of society altogether; they do not originate from local contingencies and decision-making in the case municipalities on micro- and meso-levels 3 and 4. Rather, they originate from the result of negotiations and interactions on a national level between – but not limited to – the parliament and the government, representatives for the teacher profession, and external interest groups at level 2. Some are even traceable above the national level, like the globalisation trends in education at level 1. Addressing the emergent properties that constrain and enable teachers at level 4 will also take place in the same central arena at level 2, as educational changes in a centralised educational system

such as the Norwegian one is done through political manipulation of central politicians. As mentioned earlier, this is why the morphogenetic cycle is applied to the analysis at the national level.

Below are the first- and second-order structural emergent properties that affect both teachers and students in the rural case municipality. They correspond to level 4 in figure 5 above. Many of these properties also affect agents at level 2. Note that, for the second-order emergent properties, only the institutional configurations are included in this subsection, as situational logic has been given its own section. The reason for this division is that the first- and second order emergent properties below restrict teachers and to some degree students at level 4, as well as agents on a national level (level 2). However, the situational logics presented below do not restrict the individual teachers at level 4; they only constrain the agents at level 2 who are part of the institutional configurations on a national level.

### **6.3 Structural and cultural properties conditioning social interaction**

This subchapter does two things at the same time. It is presenting the first- and second order emergent properties that is conditioning teachers in rural areas. These emergent properties are retroduced from teacher's work experiences as discussed above. In a way, it sums up the main findings from the individual articles in this thesis and each emergent property includes a reference to which article in this thesis it is discussed in. The properties below also condition the current social interaction between educational agents at a national level. As such, these structural properties are at T1, according to Archer's morphogenetic cycle.

#### **6.3.1 First- and second-order structural emergent properties conditioning current rural teachers *and* social interaction on a national level**

The first structural emergent property is the *centralised education system* and its inherent power relations. The institutions is a first-order emergent property, while the institutional configuration that makes up the centralised education system is a second-order emergent property. Margaret Archer's typology between centralised and decentralised educational systems (Archer, [1979] 2013) was presented in the theory section and mentioned in Articles 1, 2, and 3, placing Norway within the category of countries with centralised educational systems (Skinningsrud, 2013; 2014; 2019). The centralised educational system is noted here, as its origins and transformations are the results of political battles between different groups with an interest in education that exist prior to and that constrain the current teachers and students. The centralised education system is a specific institutional configuration, with specific power

relationships and asymmetries between the various agents; the manipulations, negotiations, compromises, and concessions between different parts are also not symmetrical. The power imbalance between the central government and the teacher profession, is evident in several areas; the former possesses not only superior resources but also stronger positions in terms of mandates and is indirectly, the employer of the teachers through municipalities. I would refer back to the theory chapter for a fuller presentation of the agents within the educational system and their relationships.

The second structural emergent property relevant to spatial inequality in education found in the articles is *rural demography*. Unlike the other four emergent properties, rural demography affects rural teachers only indirectly through resource distributions, and it impacts students through local opportunity structures. However, it directly constrains agents on the national level who have to create national policies; where people live is important to effective policy design. Rural demography is the result of rural depopulation of people in working age and the ongoing centralisation of people; the net natural increase in population is larger in urban areas, net national migration flows from rural to urban areas, and net immigration goes by and large to urban areas (Johansen, 2009). This is also the case in Norway, which has seen a decrease of inhabitants living in the least central areas of the country and an increase in the most central areas (Johansen, 2009; Onsager, 2019). Similarly in Northern Norway, people have moved to cities with access to higher education (Stein, 2019). Rural depopulation is, as we have seen in the section on previous research, a general issue in much of rural inequality research as a whole, stretching beyond education and into access to public services such as health, infrastructure costs, and future local opportunity structures (Johansen, 2009; Onsager, 2019). Rural depopulation of people of working age leads to an ageing population profile in rural areas, which decreases the tax payer base and increases welfare costs. While depopulation in itself is problematic, the ageing population profile will create challenges for the sustainability of the Norwegian welfare state, both in terms of finances and access to qualified personnel, especially in the health sector (Norman et al., 2020). Rural demography are problematised in Articles 1 and 3.

The third aspect of emergent properties is *resource distribution among rural and urban schools*, a recurring theme in Article 1, 2, and 3. In short, the rural case municipality Grønnevik is poorer than the urban case municipality in terms of resources, here defined in terms of resources needed to operate a school, including both financial and human assets (Archer, [1979] 2013: 91-98). It is included as a first-order emergent property, as the distribution of economic resources in rural education is a direct result of political negotiation and policy. According to Solstad (Solstad and

Theelin, 2006; Solstad, 2009; Solstad and Andrews, 2020), two of the main culprits for poor school finances and school closures are the NIS-86 reform act of 1986 and the municipality reform of 1992. The reforms are described in Articles 1 through 3 and in the theory section, but a very short recapitulation may suffice here: NIS-86 shifted the economic responsibility for public schools from the state to the municipalities for the elementary and lower-secondary levels and the county for the upper-secondary level, so that municipalities could move money between different sectors such as health and education. This has led to a state of competition between health and education, especially in rural municipalities with poor economies, due to a smaller taxpayer base as a result of *rural demography* and state transfers which do not sufficiently take rural challenges into account. Examples of rural challenges are high infrastructure costs per capita due to low population density; overhead differences per capita between school of varying sizes due to, for example, teacher salaries and building maintenance; and higher travelling costs for public (school) transport. This has led to school closures as municipalities gained increased autonomy over school structure as part of the 1992 municipality reform, as well as poor economy in the education sector in many rural municipalities, as shown in the theoretical section and in Articles 1 to 3.

I argue that it is also important to note the role of the centralised education system here. In a decentralised system, local interest groups can influence local schools, and local (and rural) schools – especially private schools – can actually receive money from outside the state-mandated funding system. This is different from a centralised system, where (rural) school funding is decided by the central government. Solstad also argues that there has been influence on NIS-86 from globalisation trends, such as *neo-liberalism; new public management; supra-national institutions* such as the EU, EES, OECD, and PISA; and lastly *ICT-driven compression of time and space* (Solstad and Andrews, 2020). Solstad’s argument is persuasive, as the influx of these kinds of ideas and actors into education policy is both documented and debated in education discourse (e.g. Hopmann, 2003; Hopmann, 2008; Nordkvelle and Nyhus, 2017). The cultural aspects of neo-liberalism and new public management are discussed in a separate section on globalisation trends in education.

The fourth structural emergent property is *local opportunity structures*, categorised as a first-order emergent property. Places can be analysed as opportunity structures; ‘that is, they [places] provide different conditions and barriers that directly and indirectly provide certain opportunities for individuals, and close others off’ (Bæck, 2019). In the case of spatial inequality in education, this mostly refers to two specific things: access to relevant work and access to education and other basic welfare services. Local opportunity structures are mentioned in Articles 1, 3 and 4, and it is important to note

that opportunity structures are here defined as an amalgam of access to relevant work and access to education, which again are related to other emergent properties (e.g. rural demography).

Access to relevant work in rural areas is not a focus in this thesis. However, rural depopulation and global urbanisation of people (and with it, the work force) is one of the main stories of the 20<sup>th</sup> and 21<sup>st</sup> centuries. Centralisation of people and work places is a self-energising process according to Johansen (2009), who argues that there has been an ongoing centralisation of work places in the Norwegian private and public sectors due to market and recruitment advantages. The same analytical point is also found in Onsager (2019), who also argues that the developing knowledge economy, as well as more stringent climate and environmental requirements, increase competition.

Onsager further points to economic agglomeration theories; co-localisation reduces costs (e.g. transaction costs), and centralisation of work places provides better access to specialised and qualified labour and customers (Onsager, 2019). Access to relevant work in rural areas is not the only factor important to local opportunity structures; access to educational institutions is also part of these structures. The access to educational institutions that are geographically close enables or constrains the access to education at the lower-secondary level, as discussed in Article 1, and the upper-secondary level education for students as discussed in Article 4. The same factors that lead to the current *resource distribution among rural and urban schools* also impact access to educational institutions and therefore local opportunity structures; rural demography and the NIS-86 reform, in combination with the 1992 municipality reform, as decided in a centralised educational system, have led to school closures and consolidations.

Our take-away point is that the centralisation of workplaces in urban areas, along with school closures and consolidations impacting access to education, creates a different opportunity structure depending on place of residence. While opportunity structure is clearly relevant to student educational trajectories, as it incurs a higher cost on further education for rural students vis-à-vis urban ones, it is also relevant to the recruitment of qualified labour into rural contexts and communities, including that of teachers and families. Recruitment of qualified teachers is discussed in Article 3, and it is an often-cited challenge in rural education. While the rural case municipality had a fully qualified and stable teaching staff, Grønrvik also mentioned some recruitment problems. Potential rural teachers may have partners who are looking for careers as well, and rural families also take future access to education and work for their children and other members into account when moving.

The fifth emergent property is *spatially unaware curriculum and educational policy*. Note that this emergent property is not a structure, but it qualifies as an emergent property from social interaction that conditions agents and individuals. This is discussed in Articles 1 to 3, especially in article 2. While it also includes the NIS-86 reform discussed above, this category is mostly concerned with curriculum. The Norwegian curriculum is split into two: one general part and another containing subject-specific competence aims. Solstad argues that the awareness of place and rurality in the national guidelines was present from the 1970s but decreased with the introduction of LK06. This decrease in awareness has continued with the new general part of the core curriculum, which contains overarching values and principles for primary and secondary education (Solstad and Andrews, 2020).

Article 2 argues that the creation and enactment of local curriculum is enabled to some extent. However, this latitude is a way to accommodate the adaptation of curriculum to the individual student to ensure that student output is in line with the stated knowledge goals (competence aims). As such, it was not created with spatial inequality in mind. Article 2 further argues that local creation and enactment of local curriculum may be more labour-intensive in the rural and northern areas of Norway than in the more urban parts of the south, as teaching material comes with an urban and/or southern bias, according to the participants in this thesis study. The issue is further exacerbated for all rural areas, due to the time pressure experienced by all teachers across spatial contexts due to an increase in administrative tasks and documentation work, for instance, which hinders the creation and enactment of local curriculum.

This focus on student output and the increase in documentation work that follows for the teachers can be understood as a result of politicians' increasing interest in external and product control within education, further exemplified through national and international test regimes (e.g. PISA). An important aim in this regard seems to be a reassurance to the public that all measures that can increase school outcomes have been implemented (Hopmann, 2003; 2008; Mølsted, 2015). This is related to globalisation trends in education, which are discussed later in this thesis.

Another aspect of spatially unaware curriculum and educational policy is discussed in Articles 1 and 2. This is the *assimilation of the Sami and the Kven* that took place in Norway, especially in Northern Norway, from 1850 to 1950 and afterwards (Minde, 2003; Jensen, 2005; Niemi, 2017). Article 1 argues that the assimilation policy targeting the Sami and the Kven, followed by the revitalisation efforts, has made a footprint especially in Grønnevik, and this must be taken into account when attempting to understand education in Grønnevik and other similar municipalities. Article 2 argues



that the enablement for using local content in education benefits those interested in bringing topics related to the Sami and the Kven into education.

There are some challenges in discussing the consequences of the assimilation of the Sami and the Kven and its role in rural education; the extent of the assimilation policy and its impact on rural education today are difficult to describe and analyse, in both quantitative and qualitative terms. Part of the challenge is the stigma tied to these ethnic identities, which leads to concealment of aspects of personal identity and important accounts of symbolic, structural, and personal/physical violence. This in turn leads to an under-reporting of the issue, which makes empirical analysis difficult due to the missing pieces. The temporality aspect presents some additional challenges and further complicates the picture when discussing the impact of assimilation on rural education in Northern Norway today. The pre-1950 history is different from that of today's data material. There has been a turn from assimilation to a movement towards ethnic revitalisation for the Sami and the Kven. There is also a geographical aspect: the assimilation has different effects in different places. The extent of underreporting, how the assimilation politics were practiced locally, and the emergence and extent of the revitalisation movement all vary depending on place. The issues of ethnic stigmatisation and underreporting, geographical differences, and varying degrees of local revitalisation taken together mean that untangling the effects of the assimilation in today's situation and within the context of spatial inequality in education is very difficult. According to Archer, not all emergent properties are evenly exercised or exercised at all due to other contingencies (Archer, 1995: 195), and uneven exercise seems to be the case when discussing the role of ethnic assimilation in rural education in this thesis.

### **6.3.2 But what about culture?**

Most of the emergent properties related to spatial inequalities in education as presented in the articles and the section above are structurally related, with cultural explanations taking the back seat. This does not mean, however, that there are no cultural properties involved.

An important cultural emergent property is *globalisation trends in education*. Cultural ideas on what education is (or at least should be) have always impacted education. Some main cultural ideas discussed in the articles that impacts spatial inequality and rural education are characterized as globalisation trends. This includes ideas such as neo-liberalism and new public management, which both lead to the design of the municipality funding system IN-86 (Solstad and Andrews, 2020).

Nordkvelle and Nyhus have also investigated the influx of management by objectives in education. They argue that objectives have always been a part of education; for example, historically, nations created schools to teach students to become soldiers. According to Nordkvelle and Nyhus, New public management came into Norwegian education in the late 1980s and early 1990s, and a very clear expression of this is an OECD report from 1988 claiming that educational statistics and reports were lacking, and that educational authorities lacked control over resource flow; it also highlighted what worked and did not work in education. This led to several white papers and documents from the Norwegian state which introduced accountability as a way to follow up on the strong influences from the OECD, EU, UN, and others (Smith, 1989; Nordkvelle and Nyhus, 2017). These globalised ideas also have impacted other aspects of educational policy, such as curriculum design and the introduction of management by objectives formulated as competence aims as in LK06, discussed in Article 2 (Mølstad, 2015).

Solstad also argues that globalisation trends such as *neo-liberalism*, *new public management*, *supra-national institutions*, and *ICT-driven compression of time and space* (Solstad and Andrews, 2020) have also impacted the municipality funding system and the NIS-86 reform, as explained earlier in this thesis. An important point here is that, while these cultural ideas do affect rural education, they do so indirectly. Globalisation trends do not impact teachers or students directly. Rather, these trends influence policy designers and politicians by ideologically legitimising policy such as curriculum or funding systems.

Local cultural deficits have been anecdotally mentioned by some local informants in Grønnevik. Examples are claims of cultural lack of appreciation for the utility, value, and necessity of education among the local community. However, I was not able to find substantial empirical evidence for an actual local ‘culture of deficit’, neither in the teacher interview material nor in the data material based on participant observation. Rather, Article 1 suggests that many in the local community feel discontented and display a lack of trust towards the local education sector, due to the lack of resources as discussed in *resource distribution among rural and urban schools* as presented in section 6.3.1. The assimilation of the Sami and the Kven in education may also have played a part in these sentiments.

However, some cultural discontinuities between the rural case municipality and mainstream education are discussed in the articles. Some informants relayed the major cultural differences between the local culture and the educational curriculum from the government. While these curriculum differences have been substantiated in literature as well (Edvardsen, 1996), they are only secondary, albeit related, to the structural

injustice created by the assimilation policy from 1850 to 1950 and the power gap between the Norwegian state and the Sami and the Kven. Article 2 discusses local content in the curriculum and examines the urban bias in curriculum versus local rural needs. Part of this gap is certainly due to cultural differences, but it is important to note that, according to the article, the urban bias can be mostly attributed to structural properties, especially policy originating from the central government.

### **6.3.3 Situational logics: Continuing on second-order emergent properties**

One of the most important results of the first- and second-order emergent properties are the relative positions of agents with their respective concerns vis-à-vis each other in institutional configurations. These configurations create situational logics for the agents, whereby certain directions of action carry a higher penalty or reward than others. Situational logics, then, exists partly at the conditioning level T1 and partly in the social interaction between T2 and T3, as it 'conditions' actions but never determines them. I start with the structural situational logic, before ending with some reflections on cultural situational logic. It is important to note that I am only discussing the situational logic that applies to the most important corporate agents; agents such as students, school owners, schools, and local communities are not included here, as they would only be of hypothetical interest, at least as long as they are unable to create changes on a national level.

The teacher profession and the central government have to deal with the position and relation they are given vis-à-vis each other in the *centralised educational system*. The teacher profession and the government are currently in a relation of *necessary incompatibilities*, meaning that they do not always agree, yet they cannot do without each other as of now. The central government need teachers and preferably as much control as possible over what kind of education the teachers give their student without causing unbearable opposition. The teachers, as persons and actors that make up the profession, want autonomy, but they need jobs, and the teacher profession is not in a position to introduce competitive alternatives, nor to hijack/overturn the centralised system, as both of these options are contingent on collaboration with other agents and massive resources which they are not currently embellished with.

This creates a general guidance towards *compromise* as situational logic between the teaching profession and the central government. This means that the agents are conditioned in the direction of compromise at the SS level, with containment being the dispositional tendency at the SI level (Archer, 1995: 218-225). This fits well within the institutional configuration in a centralised education system, in which the way for the

teacher profession to create change in education is through political manipulation of the central government.

The other first-order structural emergent properties also constrain and enable the teachers in this study as presented in the articles. Even though these SEPs themselves does not create a situational logic on their own (as they are not an institutional configuration *per se*), they seem to provide at least rural teachers with an area of improvement, and – if picked up as such – a propellant and motivation to create better compromises for themselves and for rural education. In particular, the ones tied to *resource distribution among rural and urban schools* and part of the *local opportunity structures* relevant to access to education seem to be a natural place to start in terms of negotiations. This is further discussed in the later section on policy implications.

Many of the other first-order structures and structural properties are contingent upon other agents and other parts of society at large, such as *rural demography* and *local opportunity structures*. In these cases, the teacher profession must seek out alliances with other agents or recruit to increase their numbers, as well as negotiate with the central government. This would not be easy, as teachers as a corporate agent are unlikely to involve themselves in all aspects of rural issues. Moreover, issues such as rural depopulation are major ones which concerns Western society at large; hence, the teacher profession and other agents, including the central government, become a drop in the sea, regardless of corporation. The situational logic in such situations depends upon what kind of agents are involved, and, in terms of rural demography and rural access to work, the number of agents is high. This might serve as another good illustration of what an emergent property is, as both rural demography and rural access to work are results that emerge from what persons, agents, and actors do, but they are hardly controlled in general by the agents involved and as such have a certain autonomy.

However, there are other corporate agents presented earlier in this chapter with relevance to rural education. This is especially the case for the agents in the external interest groups: FUG and the supra-national and international organisations with an interest in education, such as the EU and OECD. Their relationship and situational logic vis-à-vis the central government are somewhat harder to determine; as a parental committee, FUG have voiced their interest in spatial injustice and rural education, but they are at the mercy of the central government. They are constituted and funded by the central government through the Ministry of Education and Research and the Norwegian Directorate for Education and Training and constituted by the King-in-Council, meaning that the degree of externality can be questioned. The organisation are placed in the external category, because the collective of parents (and their

interests and concerns) that make up FUG are external to the government. Their relation to the central government and situational logic must therefore be further investigated to reach a conclusion.

When it comes to the supra-national organisations, it is clear that not all of them are equal in their relation to the central government in the educational context, and the situational logic that exists between the two must be decided case by case. The unpacking of the role, relationships, and situational logic that organisations such as the OECD and the EU have with regards to the other agents in education is a substantial work not fit for this thesis, although I have some brief thoughts on their involvement. It is clear that these organisations do have an interest and impact on education among member countries, and their effect on rural education is seemingly mostly through their cultural impact on decision makers, in this case mostly politicians in parliament who decide on national education politics. The influx of management by objectives, new public management, and neo-liberalism in education is often associated with the organisations above (e.g. the results of OECD's PISA).

I have decided not to elaborate much on the cultural situational logic that faces the agents involved, beyond stating that the ideas in *globalisation trends in education* often associated with OECD and PISA are present in education, but not without opposition. Following Archer, it seems that the teacher profession, central government, and supra-national and international organisations with an interest in education must live with both globalisation and other ideas on education being in contradiction with each other, as they cannot choose one over the other and be done with it (Archer, 1995: 230-234). This is termed a *constraining or necessary contradiction*, where two ideas are in a relation of necessary incompatibility with each other, but the agents are forced to live with both.

The situational logic it creates for the agents who have to confront this incompatibility is also one of *correction*, whereby one lives with both sets in ideational syncretism at the C-S level, interpreting and adjusting one or both positions, resulting in unification at the S-C level. Here, position A can be adjusted to be more or less similar to position B, or vice versa, depending on the relative powers of the respective adherents of position A or B; otherwise, both A or B can be adjusted so that they become mutually consistent. This part of Archer's theory is not empirically substantiated for analysis in this thesis, and this point is left to future research (e.g. incorporating supra-national and international organisations with an interest in education into Archer's models of the educational system). I now leave the first- and second-order emergent properties in order to discuss some possibilities for change on the national level.

## 6.4 Social interaction and structural elaboration

The last subchapter discussed the structural (and cultural) emergent properties at T1 in Archer's morphogenetic cycle that condition rural teachers and students at a local level, as well as the current interaction of agents at the national level. This subchapter explores the interaction from T2 to T3 on a national level in the latter decades (in some instances going back to the 1980's) up to now in order to decide whether these emergent properties are in a state of morphogenesis (change) or morphostasis (reproduction) at T4, with T4 being placed at the time of writing this analysis. This subchapter also discusses some possibilities for future change in these emergent properties by exploring the current interaction between T2 and T3, and some possible alternatives that may benefit rural teachers (and students) at a T4 in the future.

### 6.4.1 Morphogenesis or morphostasis in structural properties affecting rural teachers?

According to Skinningsrud, there has been a long consensus in educational politics in Norway, and the Norwegian educational system has maintained the main characteristics of a centralised education system regardless of political party in government through the 1990s and 2000s (Skinningsrud, 2014). If anything, the political parties have continued standardising, unifying, and centralising the education system, for instance by decreasing the number of vocational tracks at the upper-secondary level and introducing management by objectives through competence aims into the curriculum (Skinningsrud, 2014; Nordkvelle and Nyhus, 2017). Retroducing backwards, this seems to be in line with the situational logics that conditions the agents, namely, compromise and containment in the structural realm.

Social interaction between teachers and the central government is generally one of negotiation and compromise over educational reforms. Skinningsrud agrees with Archer that a change that poses a real threat to the structures in a centralised educational system must be grounded in dissatisfaction of an order of magnitude that forces action from political parties within (Skinningsrud, 2014; Archer, [1979] 2013). Such an upheaval has not been present, and the Norwegian education system has kept its centralised characteristics. I argue that the *Norwegian centralised education system* is and has been morphostatic for quite some time. This is in line with the typical pattern of change within a centralised educational system, following a stop-go-pattern of morphostasis before sudden morphogenesis (Archer, 1984: 173). Furthermore, morphostasis does not mean no change at all; it just means that the main relationships and conditions remain the same. There has been an increase in unification and systematisation in the centralised system, as briefly mentioned above and in the theory chapter, and this is further discussed below (Skinningsrud, 2014).

*Rural demography* is an important structural property for rural education. There is a decrease in population in rural areas, and the population is ageing, as established earlier in this thesis. This thesis does not take a stance on whether this steady change has resulted in morphogenesis or morphostasis as of now; further analysis is needed to confirm whether and when the steady change has created a structural change large enough to warrant morphogenesis. However, this thesis does take a stance on the importance of this structural property to rural education: it has clear consequences for education in rural areas, as it is closely tied to *resource distribution among rural and urban schools* and *local opportunity structures*, as illustrated in the corresponding sections. I would also like to repeat that the current rural depopulation in Norway is likely to continue over the next 20 years (Leknes et al., 2018), meaning that the negative consequences seen today are likely to be exacerbated. This has become a concern for the Norwegian government, who are currently investigating how to address both rural depopulation and the ageing rural population in order to address the challenges that will arise in the welfare system due to demographic changes (Norman et al., 2020).

*Resource distribution among rural and urban schools* has also been relatively morphostatic since the introduction of the NIS-86 municipality funding system and the 1992 municipality reform. The combination of NIS-86, the 1992 municipality reform, and *rural demography* is the most significant change on the structural side to rural education in recent decades, with poor school finances for rural municipalities (and counties) and subsequent school consolidations and closures as the most significant consequence. Articles 1, 2, and 3 argue that the municipal funding system that supports education is centralised and part of the centralised educational system in Norway, as it is decided upon by politicians in parliament. Furthermore, Article 3 argues that the current municipal funding system is a unified formula-based system that, in its current form, is a push towards intensive unification in education, creating better impact on state politics.

The funding system of municipalities has been revised several times and is due for revision again (Regjeringen.no, 2020b). However, this periodic update of the system, as well as the yearly political tug-of-war between parties and external interest groups on the state budget and the amount to be allocated to the municipalities, is not a morphogenetic change; rural schools are still closing down, rural schools are still losing out vis-à-vis urban ones in terms of resources needed to operate, and, most importantly, the format of the municipality funding system, with the state giving block grants, is still the same. While some are voicing dissatisfaction with the current system, no larger educational agent seems to have systemic change high on its agenda,

and there is no current upheaval from outside the centralised education system that can make changes to the municipality funding system probable.

*Local opportunity structures*, meaning exogenous factors that frame the latitude for possible choices and – in the long term – trajectories for certain persons, agents, and/or actors, are also changing. Currently, people are moving to urban areas to seek work and education, including in Northern Norway. Access to education and work follows this pattern of centralisation due to agglomeration effects, as shown earlier in this chapter. Current merging of municipalities and counties is also driven by the same agglomeration effects. Depopulation is driving welfare costs, and, in many places, welfare costs are deemed too high, and offerings are being shut down. Articles 1 and 3 illustrate examples of school closures, which are a general worsening of local opportunity structures. A decrease in welfare offerings, including schools, may also affect immigration patterns. Article 3 illustrates an increasing lack of teachers in rural areas, which also may degrade access to high-quality education; Article 4 illustrates that students from rural areas have to move in order to obtain an education that may not be relevant for their home context. While a closer investigation may be necessary to establish morphogenesis, just like in rural demography above, local opportunity structures are undoubtedly worsening in rural areas, even more so in the future if the projected rural demographic trends are correct. As mentioned earlier, the government is currently investigating how challenges of the projected demographic trends can be met, suggesting a need for young people to move into rural areas in order to create a sustainable welfare system. This is thought to be incentivised by offering, among other things, better rental conditions, free kindergarten and before- and after-school care and moving governmental workplaces into rural areas. Furthermore, they also argue a need to rethink access to work and especially in the health sector, as the projected situation in rural areas are not one of lacking work places, but rather people to fill in the positions (Norman et al., 2020).

One area of relevance that has seen changes are those discussed in the first-order emergent property *spatially unaware curriculum and educational policy*. Note that policy and curriculum are not structures in the sense of being a relationship between groups of people. Policy and curriculum can change, but they do not go through morphogenesis *per se*. They are, however, emergent properties, as they are the result of interaction between agents that condition agents in the future. They also result from agents interacting under the cultural situational logic that they are under; the



educational reform and national curriculum are compromises taking place more or less once in a decade.<sup>6</sup>

Globalisation trends have been creeping into curriculum and policy, impacting not only the NIS-86 reform but also the reform of R94, which has significantly decreased the number of options for upper-secondary education in order to create more similar educational offerings nationwide. The latter reform, especially, was a move towards extensive unification (Skinningsrud, 2014). Another noteworthy move is the national curriculum LK06 (and its successor, the LK20), whereby the curriculum changes from input control of more classical curricula such as the L97 towards competence aims and student output control from LK06 onwards (Mølstad, 2015); this output control is a push towards intensive unification (Skinningsrud, 2014). It is difficult to say which direction this change will take in the future, and arguments can be made in favour of globalisation trends in education, due to the influx of accountability through output-oriented curricula, testing regimes, and quality control systems to ensure efficiency (Hopmann, 2003; 2008).

Some changes of late may also be positive for creating a more spatially aware curriculum. The current national guidelines and the LK06 from 2006 have been revised into the LK20 for implementation in 2020 due to an aggregation of educational demands for education to be both up to date and able to meet the demands of a changing society (Utdanningsdirektoratet, 2017). Part of the changes made in the new curriculum is the decrease in competence aims in order to facilitate deeper learning and to respond to teachers' feedback from the old reform. This decrease in competence aims may very well be a welcome change to rural education, as it may alleviate time pressure, which was cited in Article 2 as a main issue in creating and enacting local content in the curriculum. These changes to the curriculum will hopefully lead more local content in the curriculum in both rural and urban settings, which will ensure a more just educational system.

In summary, this section argues that many of the structures and structural properties constraining and enabling teachers and students in rural areas are either in morphostasis or changing in ways that does not seem to be in favour of teachers and

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<sup>6</sup> The national educational reforms and curricula in Norway over the last 50 years were/are the M77 of 1977, the M87 of 1987, the R94 of 1994, the L97 for 1997, the LK06 of 2006, and the LK20 to be installed in 2020. The R94 was limited to upper secondary, the L97 to elementary and lower secondary, and the rest of the reforms to both elementary and secondary education.

students in the future. However, not all changes are negative for education in rural areas, nor is this a deterministic fate, as some of these properties may be changed.

#### **6.4.2 Creating change for (teachers in) rural areas**

This section discusses possibilities for changing the structural emergent properties that condition rural teachers (and students). In terms of Archer's morphogenetic cycle, this means introducing change in the current interaction between agents on a national level between T2 and T3, which may lead to a change in the structural emergent properties at a future T4 that will benefit rural teachers and students.

Change may have many origins. Structural and cultural conditioning in a specific context may change due to morphogenesis at large in the rest of the society. For instance, climate change may have implications for rural education as well, not only through national policy and curriculum, but also through the rural communities in which the schools are situated (e.g. through a change in possible livelihoods and hence in the patterns of place of residence). Furthermore, change may happen in the long run if the status quo is upheld; if the current trend of rural depopulation continues, it will likely lead to the weakening of the situation for teachers and students in rural areas, as the number of people who are able to incorporate themselves into agents against rural depopulation and the population foundation for keeping welfare offerings will diminish.

Another way to create change is if sufficiently powerful corporate agents decide to take matters in their own hands. The central government may very well decide to do so in a centralised educational system such as the Norwegian one; however, as this thesis is interested in spatial inequalities and a more just education system for rural teachers (and students) in particular, this thesis will continue to talk about the teacher profession as the protagonist. The changes presented in the next section do not imply anything akin to a full structural or cultural morphogenesis, as that type of change normally comes from dissatisfaction that is currently not present in Norwegian education or contingencies outside the education system. However, possibilities for change are achieved rather through creating better compromises for rural education within the centralised education system by solid corporation within the teacher profession and meaningful cooperation between the teacher profession and others. Internal corporation and cooperation with others is not enough; it is also important to articulate goals for solving the problems encountered by rural teachers in their day-to-day work experiences.

### 6.4.3 Possibilities for corporation in order to instigate change

The chapter on previous research postulated that issues related to rural education have been given relatively little attention by educational authorities, despite close to 20% of the population living in rural areas, citing the Norwegian national guidelines (LK06) as an example (Bæck, 2016; SSB, 2019b). This is further substantiated, for instance, in the first-order emergent properties of *resource distribution among rural and urban schools* and *spatially unaware curriculum and educational policy*, both of which substantiate a lack of understanding regarding rural issues. It seems that rurality has fallen out of importance in Norwegian educational policy, and, if spatial equity is to be reached, rurality has to be put on the agenda by corporate agents as a matter of educational equality. No intentional change happens without agents wanting change and taking action to achieve it. The elaboration of structure and culture is, after all, activity-dependent. This is not to give a free pass to agential action with the sky as the limit. The actions of agents are, as this thesis has demonstrated, constrained and enabled by structural and cultural emergent properties from the past. However, without agents willing to change their situation, changes that happens to them are only results of other agents taking action and/or contingencies impinging from other parts of the social system.

In order to create a better situation for rural teachers and students, a stronger case has to be made for them. In a centralised system such as the Norwegian one, this can be done through the teachers and/or or through external interest groups, as well as through the pressure that both groups can put on the central government to create better compromises. In Norway, the leading teacher's interest groups are organised as teachers' unions. Teachers' unions have previously voiced their opinions on rural issues on their own web pages and in national news: such as a lack of qualified teachers in some areas and the effects of poor municipality and county economies on school closures and opportunity structures (access to upper-secondary education; (Lund and Karlsen, 2013; Lund and Wedde, 2019; Juven, 2020). I argue that the teacher profession, especially teachers' unions, can make an even stronger case for spatial issues and rural education by putting rural education issues even higher on their priority list than they currently do.

To make a better case for spatial equality and rural education, spatial issues may be comprehensively articulated as a set of issues that constrains a large part of the teacher profession. A good starting point is to have a look at the structural and cultural first- and second-order emergent properties that constrain, enable, and shape the situation that rural teachers finds themselves in. A typical further step is then to form an agenda or comprehensive strategy tied to the articulated issue. An articulated comprehensive

strategy is a stronger way of articulating a concern or agenda than various strategies that are not articulated together. Most unions are democratic institutions, meaning that issues tied to spatial inequality in education must be raised from within in order to be put on the agenda. A significant number of teachers in the unions are the rural teachers experiencing specific rural constraints, so this task is a matter of having enough persons raising this as a concern within the unions. This is not an impossible or improbable task: about 20% of the population live in the rural regions of Norway (SSB, 2019b), with many schools having catchment areas including areas characterised as rural, urban, and anything in between. In the next section, I present some policy implications which address the structural and cultural emergent properties that rural teachers face, including some implications for cooperation with other agents.

## **6.5 Policy implications for rural education in Norway**

Two things that teacher unions are very aware of are: (1) the necessity of an agenda with well thought-out concerns on specific issues tied into a comprehensive strategy and (2) strong alliances in interactions with the central government in order to create compromises that the teacher profession as a whole can live with. This thesis contains parts of the raw material to create well thought-out concerns for rural teachers and rural education. The articles, along with the subchapter introducing the structural emergent properties, all contain analyses of some current issues and conditions facing teachers in rural areas, as well as the situational logic that these conditions create. They also describe some of the main agents involved and how their interaction generally proceeds from an observer's perspective. I now explicitly express some of the policy implications found in this thesis, as this is easier for the reader than re-reading the specific articles and reading in between the lines in the presentation of the structural emergent properties. Not only do these policy implications point out some ways to deal with the structural and cultural emergent properties that constrain and enable rural education and the teachers within, they also imply some possible ways for creating concerns and cooperation for the teacher profession.

### **6.5.1 Implications for funding and local opportunity structures**

The demographic issues in rural areas, with the depopulation of working-age people and an ageing population, may develop further (Leknes et al., 2018), and it is legitimate to ask whether the depopulation trend can be stopped at all. While a stop to this development is beyond the scope of educational policy, access to public services (within which education is a part of) is an important reason for deciding if and where to move. Basic welfare and its funding are therefore important to maintain or increase the attraction for people to stay or move in, and a healthy municipal economy is highly relevant to addressing rural depopulation (Stein and Buck, 2019). In addition, the

principle of universal rights and equal opportunity (including access to quality education) still applies, even if the metaphorical train of rural depopulation should prove to be unstoppable. Failing to address the economic issues that rural areas face is to downgrade the priority of the education of what is currently about one-fifth of the population. This would be unjust to the affected students, who are put into an educational setting not of their own choosing.

The first policy implication is to negotiate for a more differentiated funding system targeting the challenges that poorer rural municipalities face in order to change the material context for students and teachers in rural schools. It is important to repeat that educational funding is tied to state transfers and the taxpayer base, which again are tied to demographics. The importance of the municipality funding model to spatial equity is not only important to education, as stated in this thesis and multiple times by Solstad (Solstad and Thelin, 2006; Solstad, 2009; Solstad and Andrews, 2020), but also to public services in general, for instance the health sector and infrastructure (Onsager, 2019; Norman et al., 2020). Negotiating for a fair funding system can be done by increasing and adjusting state transfers to rural municipalities in a more differentiated manner to compensate for the dwindling taxpayer base and specific rural challenges such as the additional costs associated with rural areas and small-scale operations. This may address the first-order emergent property of *resource distribution among rural and urban schools*, as well as indirectly affect *local opportunity structures*, as the latter includes access to education; economy is the main reason behind school closures and consolidation (Solstad and Thelin, 2006; Solstad, 2009).

Systemic educational change is difficult to attain locally; due to the characteristics of the centralised educational system, changes have to go through the national parliament. A change to the county and municipal funding system affects all public services offered at these levels of government, which in Norway means some parts of the infrastructure, public transport, and upper secondary on the county level, as well as health, education, and other parts of the infrastructure at the municipal level. This means that the number of agents with vested interests is high, and their conditions, relations, and interactions are complex. It is therefore fair to assume that a push for a change in funding policy would not go unchallenged or at least unnoticed, and strong cooperation and collaborations between the teacher profession and external interest groups such as FUG could very well strengthen the situation. The added pressure from parental interest groups such as FUG can further legitimise the quest for equal conditions in rural and urban education: a cooperation between these two corporate agents is more likely to yield concessions from the central government.

In addition, while agents from the health and education sectors are in competition for funding at the municipal level, a push for better municipality funding is in the interest of both sets of agents; a larger pot not only benefits the concerns of both agents, it also eases the somewhat artificial competition between the two.

Political pressure in this direction has already been exerted at the time of writing. Critique has been raised from government-ordered reviews on rural demography, who argues that the current system are currently unable to provide ample resources for rural municipalities with certain challenges (e.g. resource-demanding inhabitants over 67 is not provided for in the current municipality funding system), and that the current iteration of the municipality funding system is a ‘hinder for optimal service development, both qualitatively and economically’ (Norman et al., 2020: 198-199). The demographic challenges tied to rural depopulation and inadequacies in the funding system have resulted in a government-ordered review of the municipality funding system to improve the situation (Martinsen et al., 2020; Regjeringen.no, 2020b).

However, municipalities are free to prioritise where to put their funds, and more money in the accounts in poorer rural municipalities may also go to more pressing circumstances, such as health instead of education. Another possible way of looking into the municipality and school funding systems, at least for elementary and lower-secondary education in Norway, could be to explore opportunities for the establishment or expansion of funds which address rural challenges in particular. The importance of discretionary funds to rural municipalities with economic challenges is mentioned by Onsager (2019), among others, as a way to mitigate spatial inequalities to some degree. A way of doing this within existing structures in Norway can be an expansion of the county governor’s discretionary funds and mandate. The county governor<sup>7</sup> has the inspection authority over its municipalities to ensure that governmental decisions are implemented correctly, and with the mandate comes discretionary funds from the government that can be given to municipalities to address local inequalities that are not accounted for by the municipal funding model. The annual size of this fund nationwide is slightly below 1 billion NOK (approximately 100 000 000 EUR) for 2020 (Troli and Sande, 2019). One suggestion is to expand the fund itself, as an eventual change in the municipality funding formula for the state transfers may not necessarily address all local inequalities and issues as long as the

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<sup>7</sup> ‘County governor’ is a translation from the Norwegian term *fylkesmann* or *fylkesdirektør*. The county governor is not to be confused with the county’s elected political leadership or administration. State supervision of the county’s affairs and political apparatus exist in parallel. The county governor is appointed by, and represents, the state. The governor is not involved in county-level political decision making.

municipalities themselves are responsible for prioritising education in their own economies.

Access to qualified teachers is also mentioned as general problem for rural municipalities, due to a national lack of teachers which is projected to increase and to people of working age migrating out of rural areas and into urban areas. A lack of teachers negatively affects the quality of education and opportunity structures. Recruiting students to become teachers may counteract the projected lack. As mentioned above, maintaining local opportunity structures – such as access to work, education, and basic welfare – retains or increases migration attraction and addresses the rural depopulation problem (Stein and Buck, 2019). Teacher-education institutions can also help by offering decentralised study programs. Preparing teachers for a diverse set of spatial contexts throughout their education via relevant curriculum and rural teacher placements in campus-based teacher education can also help, as it may increase students' willingness to teach in rural areas (or at least prepare the ones who wish to do so).

### **6.5.2 Implications for a spatially (and ethnically) aware curriculum**

When reviewing the literature on rural education, curriculum came up repeatedly as an important battlefield for spatial inequalities and rural education. This thesis follows in the same vein, as presented in Articles 1 and 2, as well as in the first-order emergent property of *spatially unaware educational policy*. This thesis postulates in several places that rurality is not a very explicit part of education policy, and that corporate agents must put it in for it to be included. Educational policy, including both the general and subject-specific curriculum is up for evaluation every decade or so, and it is important for corporate agents to have articulated aims and strategies for spatial inequality (including rurality) for when these negotiations arises. However, this may not be very helpful, as both the general and subject-specific curricula have just been under recent review, and it will take some time until the next reform revision (Solstad and Andrews, 2020).

A pragmatic proposition presented in Article 2 is that alleviating time pressure on teachers would take away the constraint in the creation and enactment of local curriculum. Part of the time pressure can and potentially is already managed through central negotiations for new educational reforms (e.g. reducing the number of competence aims in the LK20 (Utdanningsdirektoratet, 2017; 2019), but a reduction of time pressure through an examination of documentation routines or delegation of administrative responsibility may be possible, even locally. Economic inequalities that cause uneven conditions for the creation and enactment of local curriculum can also be dealt with through the funding system, as discussed above.

Furthermore, one can consider the possibility of organising education in a slightly different way, by giving the teachers or schools more autonomy in enacting central curriculum and creating local curriculum. A juxtaposition between the Norwegian and the Finnish education systems is given below as a possible starting point in such a discussion. There is an important caveat here; increasing autonomy is meant here as an increase in latitude, not by delegating more tasks from other parts of the education system over to lower levels without ample resources to follow, disguising delegation and an increase in work as greater autonomy.

The next point is not a policy implication *per se*, but it is relevant to rural education. It is difficult to determine the degree of impact of the assimilation of the Sami and the Kven on education in Grønnevik as discussed in Article 1, although the importance of this subject in affected case municipalities is undeniable. In any case, cooperation between teacher profession and Sami and/or Kven interest groups can potentially strengthen not only the current revitalisation but also education in rural areas where the Sami or Kven identities are marginalised. This kind of cooperation is already happening in many areas, as shown in Articles 1 and 2, but it can be taken even further when Sami and/or Kven interest groups are in negotiations with the central government. Strengthening the claims put forward by the interest groups, especially ones tied to education, often also strengthens the rural education in Northern Norway, as rurality and ethnicity are very much intersectional as shown in Grønnevik in Article 1.

### **6.5.3 Alternatives for the organisation of the educational system**

While not a policy implication in itself, it would also be beneficial for agents to note the contributions of Archer's theory to the centralised and decentralised education systems for the analysis in this thesis. One reason is that Archer's work presents a working map of the power relations and imbalances in educational structures. Not only does it lay out the relevant agents and their relations, it also shows that the educational structure is man-made and should not be taken as 'natural' or the only way. I continue with a juxtaposition of the centralised Norwegian educational system against the Finnish state educational system. This juxtaposition is a short one; its function is not a full comparison, but rather to illustrate that other education systems can differ from the Norwegian one and that some of these differences can serve as the foundation for possible educational changes in rural education.

The Finnish educational system is one of the most well-known educational systems in Europe. One reason is that Finnish students have repeated high scores on OECD's PISA tests (Bulle, 2011). Another reason is that their teachers also enjoy a high status in Finnish society. The Finnish education system is in some ways a hybrid between a



centralised and a decentralised education system. In Finland, the legislative assembly have strict control over educational policy, with binding policy documents at a national level. Finland has a *national core curriculum* which schools and teachers must teach. In this way, it is most reminiscent of a centralised education system. However, municipalities as local education providers are obligated to organise education by developing their own curriculum, the *mandatory local curriculum* in relation to the core one, either at the municipal or the school level (Mølstad, 2015; Autti and Bæck, 2019). This differs from the Norwegian context; as discussed in Article 2, local curriculum in Norway is an adaptation of centrally established competence aims, with the state as premise deliverer. This means that the Finnish education system is not completely centralised, as the teacher profession can create a significant part of curriculum locally, with minimal involvement from the central government. However, it is not a decentralised educational system either, as the teachers' possible avenues of local influence are limited to parts of the curriculum only, external interest groups are not given formal access to this local influence, and the central government maintain their position as the strongest source of policy.

I have only two arguments to make from this short juxtaposition: first, the Finnish education system seemingly provides more autonomy to teachers than its Norwegian counterpart. This autonomy has the potential to be a win-win situation for both rural education and the central government in the Norwegian system; the central government can decide the National core curriculum and keep their structural position, while rural schools get to create curriculum autonomously, adapted to their local contexts and students as they see it fit. Furthermore, the autonomy granted to teacher profession to create this local curriculum is probably strengthening their position in the education system, improving recruitment of competent teaching staff and securing significant status in the eyes of the public. Recruitment should be of special interest for the central government in Norway, as there is an increasing lack of teachers nationwide in both rural and urban contexts (Fredriksen, 2018).

Second, while the merits of the Finnish education system are often lauded in public educational discourse, the structural differences between the two education systems that have been briefly touched upon here are rarely discussed in public discourse. Both the teacher profession and other agents in the Norwegian education system should take note of these differences, as they may serve as a starting point in articulating concerns for a potentially more just educational system for rural education and a better position for the teacher profession.

#### **6.5.4 Information and Communication Technology as a double-edged sword**

One of the challenges in rural areas in general is the recruitment of qualified labour, including of teachers. ICT-based solutions have been lauded as a part of the solution to many rural education issues, but the results have been varied; their impact may be negligible, and, while there is a need for connectivity, rural areas are often under-connected (Neal, 2016; Saleminck et al., 2017). In addition, while they are a great opportunity for curriculum delivery; social relationships, depth of relationship, professional community building, and trust are not built into technology (Barter, 2013). The use of ICT solutions may offer certain subjects in rural areas through agglomeration as a way to share teacher resources more efficiently. An example may be that one or more municipalities have pooled resources to employ a foreign language teacher, and ICT solutions could be a way to teach and follow up on students on top of in-person contact. One possible scenario can be online lectures catered to students in remote areas where travelling would be too resource demanding, eventually in addition to in-person contact concentrated in shorter periods. Another possibility is to circulate the location of the lectures, whereby some students are present in person while some are present online.

Not only does this enable wider access to certain subjects (or education as a whole) for students in rural areas, it may also be a cheaper solution for the municipality, and the pooling can mean that positions that otherwise would be part-time are now full-time. The caveat, however, is that ICT-based solutions can be a double-edged sword. They may lead to a more spatially just education system if used to provide or uphold an offering that would not exist otherwise. However, they may also be a way for school owners to save money on their already small budget, and, if used as austerity measures, they may actually decrease the quality of education provided to rural students (or other students experiencing such measures).

#### **6.6 Ending remarks**

This thesis ends in the same way it began, by revisiting its title: *Spatial inequalities in education in Northern Norway from the teachers' perspective – Enquiring rural-urban differences in teachers' work experiences*. I wrote in the introduction that the title is a shorthand answer to the common question of what I do. The title points towards spatial inequalities in education, and this thesis is – in a metaphorical sense – a map over some of these spatial inequalities in education in Northern Norway, seen from the vantage point of teachers. The map is not the territory, but I argue that this thesis is at least a decent map of the current territory, and this judgement rests on the strong

footing of this thesis all the way from the philosophy of science with its critical realist foundation, through its methodological, empirical, theoretical, and analytical aspects.

More specifically, this thesis points to a set of structural constraints and enablements conditioning both rural teachers and students on a local level, as well as the agents on a national level who, in varying degrees, are trying to control and operate in the centralised Norwegian educational system. These constraints and enablements have led to unequal conditions for teachers and students depending on geography; teachers and students in the rural case municipality are losing out vis-à-vis those in the urban case municipality.

The constraints are sorted into first- and second-order emergent properties, as they are respectively the result and the result of the result of what people have done in the past. The structural emergent properties that specifically condition the teachers in my study are (1) *the centralised education system*, (2) *rural demography*, (3) *resource distribution among rural and urban schools*, (4) *local opportunity structures*, and (5) *spatially unaware curriculum and educational policy*. The centralised education system also creates the second-order emergent property of a situational logic of *compromise* between the central government and the teacher profession, with a directional guidance towards compromise and containment.

However, the current structural elaboration for the structural emergent properties above is either: (a) morphostasis for *the centralised education system* and *resource distribution among rural and urban schools* or (b) change in an unfortunate direction for rural teachers and students, possibly ending in morphogenesis for *rural demography* and *local opportunity structures*. Lastly, there are both positive and negative changes to what is currently a *spatially unaware curriculum and educational policy*. The morphostasis and the current changes are not determinate or forever; future changes may come from external contingencies outside education, exemplified by but not limited to pandemics, climate changes, or changes in the state economy. They may also come from the issues identified: the continuation of rural depopulation may lead to a dwindling rural population and the disappearance of potential agents receiving and advocating for rural education. Changes may also come by as a result of active negotiations between agents with articulated concerns; there is some potential for the teacher profession to change the conditions for rural teachers and students through articulating an agenda for rural education. It is important to note the power imbalances in the centralised educational system; the teacher profession are most served by entering into alliances with other agents such as parental interest organisations (e.g. FUG) in order to put pressure on the central government.

This thesis also presents certain policy implications, which is largely derived from and meant to address the structural constraints and enablements found among the first- and second-order emergent properties. Changing the funding system, including available discretionary funds for education, may change several of the structural constraints tied to a lack of resources. This thesis also proposes some ideas tied to achieving a spatially (and ethnically) aware curriculum; most of these provide greater latitude to the teachers, in terms of an increase in both resources and autonomy in the creation and enactment of local curriculum. Finally, some ICT-based solutions are discussed as being a double-edged sword that may help rural education, but, if used wrongly, exacerbate spatial and rural inequality in education.

### **6.6.1 The quality of the study**

This thesis is a qualitative study, and its quality must be judged as such. I have chosen to adopt the terms validity and reliability, although in a critical way; the two concepts cannot be applied in the same manner as they would be in quantitative research (Fangen, 2010).

Validity often points to whether the research actually measures what one seeks to measure, or whether the findings are really about what one seeks to explore and understand (Ibid.). This thesis aims to research spatial inequalities in education through teachers' work experiences. Here, both the participant observation and the interviews score well, as the participant observation took place among rural teachers, and the interviews were conducted with teachers in different spatial contexts. The interview questions were designed to investigate spatial inequality. Furthermore, both the participant observation and the interviews (as shown in the articles and the summary in Chapter 5) reveal results that are not only analysed on empirically relevant grounds but also key to the thesis topic. The level of truthfulness of the interviews and the validity of my observations, as well as the validity of my interpretation and analysis, are also important in terms of the overall validity of my work. I argue that the combination and crosschecking of methods was helpful for gaining some confidence in the truthfulness of the interviews and the validity of observations. It is difficult to put an absolute value on this form of validity, but the combination of the two data-collection strategies means a higher validity than only utilising one of them.

The validity of my interpretation is also difficult to measure, but the method chapter attempts to provide a transparent account of how the data material was collected and how I systematically conducted reflexive work to ensure as little conflation between my personal bias and the research results as possible. The ethics chapter also shows how I took the research results back to some of the participants, and the outcome was seemingly agreeable. Parts of this thesis have also been presented at scientific

conferences, one of the articles was accepted by a peer-reviewed journal and two as chapters in a scientific anthology, which shows that the validity of parts of my research passes the bar of scientific scrutiny. I then argue that my interpretation of the data is at least a probable one, as opposed to one that is possible or speculative (Døving, 2003).

Reliability, or whether another scientist would obtain the same or similar observations and findings and reach similar interpretations and conclusions in the same context, is even more difficult to verify than validity (Fangen, 2010). The method chapter shows my systematic attempt to clearly present and separate data from interpretation. This at least presents an opportunity for other researchers to investigate my work – from the data material to the categories and analysis – to see if they would reach similar conclusions. Another part of the reliability discussion is transferability: whether my interpretations can be used in other contexts. The comparative dimension of having two case municipalities in this thesis, as well as the inclusion of several researchers and even more case municipalities in the same research project, provide possibilities for comparison that improve reliability. In addition, parts of the analysis point to structural properties causing inequalities based on geography. Here, similar empirical work in other contexts can investigate if my analysis is transferable (e.g. national policy such as municipal funding models and curriculum apply to the nation as a whole, and its consequences elsewhere can be observed or measured and analysed).

### **6.6.2 Implications for future research**

It is impossible for any single piece of research to cover everything of relevance and/or interest, and there are many topics that I would like to have included or follow up at a later time, but had to leave in the wayside for now. Below are some that I find both important and interesting as follow-up ideas.

Some recent developments in the organisation of counties and municipalities warrant further research. Several of the counties were consolidated in the year of writing of this thesis: from 19 to 11 counties and a reduction from 428 (422 in 2019) to 356 municipalities (Regjeringen.no, 2017; 2020a). In addition, the municipal funding system is under revision (Martinsen et al., 2020; Regjeringen.no, 2020b). Both factors have implications for the future resource allocation to rural education and possibly school consolidations or closures, and it would be interesting to investigate if the consolidation of counties and municipalities, along with a revised municipal funding system, helps to decrease or exacerbate spatial inequality in education.

The implementation of the new education reform LK20 also needs follow-up research, especially in terms of whether the new policy is empirically more spatially just than its

predecessor LK06. The reduction of competence aims is a promising start to the creation and enactment of local curriculum. However, LK20 is also a continuation of the seemingly here-to-stay-for-now impact of globalisation trends in education, as it continues the trend of output-oriented curriculum. It would be very interesting to research the actual consequence of the new LK20 on rural education, especially on whether it actually results in more latitude and autonomy for the teachers creating and enacting local curriculum.

This thesis also hints at an interesting theoretical development: the inclusion of international agents such as the EU or OECD into Archer's models of the centralised and decentralised educational systems. This is a considerable amount of theoretical work, and much empirical leg-work and a closer investigation of these agents and their impact on education systems in different countries must be done before a working model can be presented.

This thesis, especially the chapter on previous research, claims a lack of research on rural education, as well as a need to take context seriously in education research. The thesis is only part of the answer in filling this gap, and, while there has been an increase in research on these subjects, there is obviously need and room for more studies in this general area, both in Norway and internationally. The research project RUR-ED, which this thesis is a part of, has employed various methods and case municipalities in several countries. I believe there is place for more similar approaches, both in Norway and internationally, to cultivate an even more substantial body of research to illuminate spatial injustices in education.

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# Appendix



Unn-Doris K. Bæck

9006 TROMSØ

Vår dato: 24.10.2017

Vår ref: 56704 / 3 / STM

Deres dato:

Deres ref:

## Tilråding fra NSD Personvernombudet for forskning § 7-27

Personvernombudet for forskning viser til meldeskjema mottatt 19.10.2017 for prosjektet:

56704	<i>RUR-ED Spatial inequalities and spatial justice in education</i>
Behandlingsansvarlig	<i>UiT Norges arktiske universitet, ved institusjonens øverste leder</i>
Daglig ansvarlig	<i>Unn-Doris K. Bæck</i>

### Vurdering

Etter gjennomgang av opplysningene i meldeskjemaet og øvrig dokumentasjon finner vi at prosjektet er unntatt konsesjonsplikt og at personopplysningene som blir samlet inn i dette prosjektet er regulert av § 7-27 i personopplysningsforskriften. På den neste siden er vår vurdering av prosjektopplegget slik det er meldt til oss. Du kan nå gå i gang med å behandle personopplysninger.

### Vilkår for vår anbefaling

Vår anbefaling forutsetter at du gjennomfører prosjektet i tråd med:

- opplysningene gitt i meldeskjemaet og øvrig dokumentasjon
- vår prosjektvurdering, se side 2
- eventuell korrespondanse med oss

### Meld fra hvis du gjør vesentlige endringer i prosjektet

Dersom prosjektet endrer seg, kan det være nødvendig å sende inn endringsmelding. På våre nettsider finner du svar på hvilke [endringer](#) du må melde, samt endringskjema.

### Opplysninger om prosjektet blir lagt ut på våre nettsider og i Meldingsarkivet

Vi har lagt ut opplysninger om prosjektet på nettsidene våre. Alle våre institusjoner har også tilgang til egne prosjekter i [Meldingsarkivet](#).

### Vi tar kontakt om status for behandling av personopplysninger ved prosjektslutt

Ved prosjektslutt 31.12.2022 vil vi ta kontakt for å avklare status for behandlingen av personopplysninger.

Se våre nettsider eller ta kontakt dersom du har spørsmål. Vi ønsker lykke til med prosjektet!

*Dokumentet er elektronisk produsert og godkjent ved NSDs rutiner for elektronisk godkjenning.*

Vennlig hilsen

Marianne Høgetveit Myhren

Siri Tenden Myklebust

Kontaktperson: Siri Tenden Myklebust tlf: 55 58 22 68 / [Siri.Myklebust@nsd.no](mailto:Siri.Myklebust@nsd.no)

Vedlegg: Prosjektvurdering

## KJÆRE LÆRER

Du inviteres med dette til å delta i forskningsprosjektet "RUR-ED Spatial Inequalities and Spatial Justice in Education". Hensikten med undersøkelsen er å undersøke hvordan det er å gå på skole i rurale områder. Målet er å bidra til økt kunnskap om hvorfor elever i rurale områder gjør andre utdanningsvalg enn elever i mer urbane området.

Prosjektet er finansiert av Norges forskningsråd. Prosjektet vil bli utført av forskere ved Universitetet i Tromsø.

## HVORDAN DELTA?

### Intervju:

Vi ønsker å rekruttere lærere ved din skole til personlige intervju. Under intervjuet vil det bli benyttet lydopptaker. Intervjuet vil ta 30 til 45 minutter og vi blir enig om tid og sted med den enkelte. Vi ønsker primært å foreta intervju i arbeidstiden, der dette kan avtales med skoleleder.

## GENERELL INFORMASJON

De eneste som har tilgang til intervjuene er forskerne på prosjektet.

Det er frivillig å delta. Du kan når som helst og *uten å oppgi grunn* trekke ditt samtykke til å delta i undersøkelsen. Dette gjør du ved å sende e-post til oss: [ubaooo@uit.no](mailto:ubaooo@uit.no).

Det er ingen andre enn forskerne på prosjektet som vil få tilgang til de personidentifiserbare opplysningene. Forskerne er underlagt taushetsplikt og opplysningene vil bli behandlet strengt konfidensielt. Resultatene av studien vil bli publisert som gruppedata, uten at den enkelte kan gjenkjennes.

Forskningsprosjektet forventes å være avsluttet til jul 2022. Datamaterialet vil lagres med personidentifikasjon i ti år etter prosjektslutt i påvente av eventuelle oppfølgingsstudier. Dersom det ikke blir aktuelt med oppfølgingsstudier, vil datamaterialet være anonymisert senest innen 31.12.2032. Du vil motta ny informasjon og ny forespørsel om å delta dersom det blir aktuelt med oppfølgingsstudier.

Prosjektet er tilrådd av Personvernombudet for forskning, Norsk senter for forskningsdata.

Vennlig hilsen

Unn-Doris K. Bæck  
professor

## Samtykke til deltakelse i studien RUR-ED Spatial Inequalities and Spatial Justice in Education

Jeg har mottatt informasjon om studien, og er villig til å delta

---

Sted, dato, signatur av prosjektdeltaker

## Appended papers





**Article 1: On Teacher Work Experiences in a Rural Case Municipality in Northern Norway -Consequences of a Lack of Resources, School Closures, and a History of Ethnic Assimilation**

RØD, D. A. V. unpublished 2020. On Teacher Work Experiences in a Rural Case Municipality in Northern Norway -Consequences of a Lack of Resources, School Closures, and a History of Ethnic Assimilation.



# On Teacher Work Experiences in a Rural Case Municipality in Northern Norway

Consequences of a Lack of Resources, School Closures and a History of Ethnic Assimilation

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**Keywords:** Rural education, school closures, teacher's work experiences, Sami education, Kven education

This manuscript is not published elsewhere, nor is it presently under review elsewhere, and it will not be submitted elsewhere as long as it is under review for JRRE. The manuscript is a part of the research group RUR-ED at UiT the Arctic University of Norway, and approved by NSD (Norwegian Centre for Research Data), which approves whether the research is ethically sound in terms of data protection of sensitive information.



## **Abstract**

*This article explores structural constraints on being a teacher in a rural case municipality in Northern Norway. The analysis is based on qualitative interviews with teachers and participant observation, predominantly within a school environment in 2018, in a case municipality in rural Northern Norway. The main finding is a lack of resources caused by the Norwegian municipality funding system and rural demography, leading to a lack of education materials, school closures, and distrust towards local politicians in the case municipality. This paper also suggests that the lack of resources should be understood with reference to the local context and history, in this case the assimilation of the Sami and the Kven which was official policy between 1850-1950.*



## Introduction

There has been an increasing recognition of the importance of place in educational research since the 2000s, e.g., Farrugia (2015); Gulson and Symes (2007); White and Corbett (2014). However, education research has mostly taken place in urban contexts, placing rural contexts in a minority position (Beach et al., 2019; Biddle et al., 2019; Bæck, 2016; Hargreaves et al., 2009; Paulgaard, 2017). This paper is a contribution to the focus on place, context, and especially rural context in education research, concerning itself with the structural constraints that condition teacher work experiences in a rural case municipality in Northern Norway with the pseudonym *Grønnvik*.

A focus on context and place is necessary to adequately address and discuss inequalities in educational institutions (Bæck, 2016; Gruenewald, 2003; Hargreaves et al., 2009; Roberts & Green, 2013; Schmitt-Wilson et al., 2018; White & Corbett, 2014). In Norway, students from rural areas are doing worse in terms of national test scores in mathematics, reading, and English in the eighth grade and on the national exams in tenth grade, with the latter being part of the foundation for admission into upper secondary education (Bæck, 2019). Furthermore, students from Northern Norway have higher dropout-rates from upper secondary school (Bæck, 2012; Kvalsund, 2009; Markussen et al., 2012; SSB, 2019a; Vibe et al., 2012). Also, according to The Norwegian Directorate for Education and Training, schools in Troms and Finnmark county are also contributing less than average to student's national exam results in the tenth grade after adjusting for parental background (Utdanningsdirektoratet, 2020).

Whether this means that rural schools are worse than urban schools is contested, and many argue that this is not the case (Hargreaves et al., 2009; Solstad, 2009; Solstad & Thelin, 2006).

In 2009, Rune Kvalsund argued that much of educational research consists of single cases in an urban setting, often locked inside a classroom, and then further argued for contextual detail

and new, large multiple case studies (Kvalsund, 2009). Since 2009, several studies have addressed rural issues and rural-urban differences in education in Norway. The *Learning Regions Project* analysed the differences in educational attainment levels between two Norwegian counties, developing a methodology for schools and municipalities to use in improving their attainment levels (Langfeldt, 2015). Norwegian research networks have released special journal issues on the subject; comparative attention to *Place* is important to understanding differences in, e.g., student attainment based on location (Reegård et al., 2019). Local opportunity structures are important in understanding rural-urban differences; a lack of nearby access to relevant education for the local labour market can partly explain, e.g., drop-out rates from upper secondary school in Northern Norway (Bæck, 2019). In addition, rural-urban comparisons shows differences not only in local employment opportunities but also in local culture and the understanding of education (Hegna & Reegård, 2019).

One of the structural constraints analysed in this paper is education funding and the related phenomenon of school closures. In Norway, the Norwegian Ministry of Education and Research is responsible for all levels of education, setting the national curriculum for primary and secondary education and training through the Norwegian Directorate for Education and Training. In accordance with the Education Act, the governance of the education system is divided into three levels. Municipalities are responsible for primary and lower secondary schools, county authorities are responsible for upper secondary education, and the state is responsible for higher education (Kunnskapsdepartementet, 2019). Before 1986, local school budgets were approved by the state, and funding was earmarked and transferred based on the approved budget. In 1986, the municipality funding system changed and became the *New Income System* reform (NIS-86). School funding, at the primary and lower secondary levels, became based on local taxes and state transfers given as a part of a block grant for school, health, and other services carried out at the municipality level. This allowed for local



autonomy over the reallocation of money between, e.g., school and health funding (Kvalsund, 2009; Nordkvelle et al., 2017; Solstad, 2009; Solstad & Andrews, 2020; Solstad & Thelin, 2006). In 1992, the parliament passed a new municipality act, which gave municipalities significantly more freedom to decide on school structure, without interference from the state. The combination of NIS-86 and the 1992 municipality reform has led to school closures in poorer rural municipalities in order to save money because the state transfers often do not adequately reflect rural challenges (Solstad, 2009; Solstad & Andrews, 2020; Solstad & Thelin, 2006), e.g., an ageing population and the depopulation of people of working age (Johansen, 2009; Onsager, 2019).

School closures and consolidations are often a response to declining and ageing rural populations, and they are used as a primary strategy with which to save money and reach fiscal accountability (Bushrod & Wilson, 1999; Corbett & Tinkham, 2014; Corbett, 2014; Cuervo & Wyn, 2012; Galway, 2012; Mathis, 2003; Tieken & Auldridge-Reveles, 2019; Aasland & Søholt, 2020). According to *The Norwegian Directorate for Education and Training*, there were 284 fewer public primary and lower secondary schools in 2018 than in 2008, and closed schools had an average of 63 pupils in the year of closure (Utdanningsdirektoratet, 2018). The consequences of school closures on Norwegian students in general is debatable. School closures and consolidations are a process that often leads to a high level of conflict, with polarisation between fronts and a search for trump cards as a strategy to overcome the opposition instead of entering into serious, difficult, and respectful negotiations (Corbett & Helmer, 2017; Søholt et al., 2017; Aasland & Søholt, 2020). Autti and Hyry-Beihammer (2014), who are from Finland, find that local communities have little say in the decision-making process regarding school closures. They also find that school closures lead to a loss of group- and place identity and local social capital in many local communities. School closures and the pressured economic situation among many smaller

municipalities may also reduce “immigration attraction” and make some smaller communities unattractive for people and families who might consider moving there (Autti & Hyry-Beihammer, 2014; Svendsen, 2018; Villa & Haugen, 2016).

The relative importance of school closures is contested, and Johansen argues that while access to services is decreasing in rural areas and centralisation is affecting the perceived quality and economy of rural municipalities, Johansen was not able to conclude that centralisation, in general, had significantly impacted individuals, regions, or Norway as a whole (Johansen, 2009). Slee and Miller (2015) argue that in Scotland, the lack of basic employment is much worse for the vibrancy of local communities than school closures and other public service cutbacks. Egelund and Laustsen (2006) and Barakat (2015) argue that school closures are not a death-blow to the community but rather the end result of a dwindling rural population. However, Barakat warns against translating this into a recommendation to close down schools, because the process is not necessarily cost effective and may still negatively affect the migration balance (Ibid.). Solstad argues that depopulation only ranks second after economy as a rationale behind school closures in Norway (Solstad, 2009; Solstad & Thelin, 2006), which may suggest that many school closures in Norway occur before the schools’ “demographic death”. However, newer research shows that the number of students may have slightly passed economy in terms of the arguments used for school closure (Aasland & Sørholt, 2020).

This paper focuses on teachers’ work experiences. Teacher effectiveness and quality have a huge role in students’ academic success, and many argue that the quality of teaching is the most important school-related factor in student achievement, i.e., Hattie (2003); Stronge (2010). The teacher position is also in the centre in a web of educational relationships between the educational system and its policies, students, parents, and the local community. Teachers are therefore uniquely practical as a source when considering policy implementation

(Barter, 2013). Enquiring into teachers' narratives and work experiences may provide insights into both teachers' professional identity (Beck, 2017; Connelly et al., 1999) and the highly structured frames of education (Goodson, 1999; Goodson, 1996). Teachers' experience, knowledge, and pedagogical thinking are context bound and affected by the environment (Connelly et al., 1999; Goodson, 1996; Karlberg-Granlund, 2019), and teachers' narratives should be investigated within a context of history and social construction (Goodson, 1999). Context is many faceted, and this paper is mostly interested in the structural aspects of context, especially material and external context (Clarke & O'donoghue, 2017). There are also specific rural challenges for teachers, e.g., attracting and maintaining qualified teachers in rural areas (Lind & Stjernström, 2015; Stelmach, 2011) and limited opportunities in rural areas for professional development (Downes & Roberts, 2018). Teachers' work experiences have also been used to enquire rural/urban differences in education elsewhere (Karlberg-Granlund, 2019; Preston, 2012).

Due to the importance of teachers and their position in the educational system, it is important to know what kinds of impediments they experience in their work situations, as well as in specific geographic contexts. In this paper, I address the following research question: *Which factors constrain teacher work experiences in the rural case municipality of Grønnevik?* I start by presenting the theoretical approach, discussing some important aspects of structures in education, before covering methods, the case municipality, and analysis.

## **Theoretical Approach to Studying Teacher Experiences**

The theoretical framework for this paper is derived from the work of Margaret Archer. This framework was chosen due to its focus on the relationship between structure and agency, also in education. A focus on structures is an important part of taking context seriously in

education research, and Archer contributes with a framework with which to understand the power relationships within the educational system.

Archer argues that people are always *involuntarily placed into situations not of their own making*, both on a collective level, as agents (Archer, 1995), and on an individual level (Archer, 2007). These situations are the result of the structural and cultural conditions created by the actions of people in the past, be they institutional configurations, resource distributions, demographic distributions, laws, ethnic and religious divides, or ideologies. These conditions guide the agent or the individual by providing rewards or punishments according to the direction the agent or individual decides upon. Such decisions are often guided by the logic of vested interests that comes with the position one finds oneself in. These conditions are not wholly deterministic regarding what people do; history has shown that both agents and single individuals have defied and/or changed these conditions before. The agents have their own powers to attempt to change, reproduce, or even avoid these conditions, either unknowingly, unintentionally, or intentionally, according to their concerns (Archer, 1995, 2007).

### ***The Norwegian Education System as Centralised***

There is a debate regarding whether the Norwegian educational system is centralised (e.g. Karseth et al., 2013; Kvalsund, 2009; Skinningsrud, 2014; Smith, 1989; Volckmar & Wiborg, 2014). Those arguing for the system being decentralised often refer to a decentralised distribution of decision-making in the Norwegian educational system (e.g. Karseth et al., 2013). Some also argue that centralising and decentralising efforts have occurred simultaneously since the mid-1980s (Volckmar & Wiborg, 2014). According to Skinningsrud, such classifications are only descriptive and do not emphasise who decides upon the delegation of decision making, and, by extension, how changes can happen within the system. Skinningsrud proposes the use of Margaret Archer's analysis of educational systems to focus

on the power relationships within the education system, instead of the distribution of decision-making (Skiningsrud, 2014).

Archer defines the state educational system as ‘*a nationwide and differentiated collection of institutions devoted to formal education, whose overall control and supervision is at least partly governmental, and whose components and processes are related to one another*’ (Archer, 2013, p. 54). According to Archer, a *centralised educational system* is one that is governed *centrally*, in which a small subsystem integrated into the centralised state plays a dominant part. This leading subsystem is often politicians in parliament, who control educational laws and decide upon reforms and guidelines, such as curriculum, as well as funding from a centre of power. Few real channels of influence exist; influence from the teaching profession and other external interest groups must occur indirectly through the political manipulation of central politicians. In a *decentralised educational system*, the structure and content, e.g., funding and curriculum, can be decided more locally, as well as centrally, because external interest groups such as the teaching profession, parent groups and local businesses can influence, e.g., local school boards (Archer, 2013). There are also degrees of centralisation and decentralisation; the division is more of a continuum than a dichotomy.

According to Skiningsrud, the Norwegian educational system became centralised between 1889 and 1940 (Skiningsrud, 2013). In the Norwegian educational system, politicians have direct control over unified laws relevant to education and a strongly unified and standardised curriculum, with low levels of differentiation for students in the age of 6 to 16 in primary and secondary schools (Nordkvelle et al., 2017; Skiningsrud, 2013, 2014). This centralisation has been urban; Solstad argues that there was a sentiment, traceable back to the eighteenth century, that city schools were better due to their larger size and that rural children needed to learn to read and write like their urban counterparts. The laws regarding urban and rural

education differed in Norway until 1959, at which point the two school types became unified, and obligatory primary education for 9 years became the law in 1969. This led to a situation in which the urban school served as a premise supplier for rural schools when they became unified (Solstad & Thelin, 2006). Furthermore, the number of vocational tracks was lowered in the 90s and 00s through the R94 and LK06 reforms, increasing unification and lowering differentiation (Skinningsrud, 2014).

## **Method**

The data collection in this case study includes twelve qualitative, semi-structured interviews with teachers. It also includes three months of participant observation in the first half of 2018 in and around the municipal centre of Grønnevik, primarily in school settings at the lower secondary school. The combination of interviews and observation allows the researcher to address the potential conflict between self-reports and behavior (Fangen, 2010; Jerolmack et al., 2014). The teachers interviewed were chosen pragmatically on the grounds of their availability in between duties during their school days. All of the teachers, except one, are from either the municipality of Grønnevik or a neighboring one. The interviews were recorded with a digital tape recorder, and the teachers all provided written, informed consent.

This paper is concerned with teachers' work experiences as an empirical starting point. Here, these defined as the teachers' own experiences and reflective knowledge of their work. While the teachers are very qualified in terms of understanding their work impediments through their positions in the education system, the structural constraints must be analysed out of the work experiences with a solid theoretical framework. Also, the teachers' work experiences from the interviews, as presented in this paper, are an interpretation of an interpretation; they are the teachers' own interpretations of their work experiences as communicated to and again interpreted by the researcher. To address this issue, a focus on context, aiming for what

Geertz terms a *thick description*, is important in increasing the quality of analysis and substantiating the validity of the researcher's interpretation (Geertz, 2000). To further substantiate this study's validity, I have opted for a specific kind of methodological triangulation: participant observation and the use of former experiences has allowed the researcher to further substantiate work experiences outside the interview situation over time. This combination is both enabling a thicker description and facilitating a higher degree of validity because it allows crosschecking the data derived via the different methods against one another (Fangen, 2010).

### ***Case Municipality***

The case municipality, *Grønnvik*, is one of the country's largest municipalities in terms of land area. It has a diverse natural environment, with dramatic mountains, rivers, valleys, fjords, and rich flora and fauna. Its population is approximately 5,000, and the closest city is a few hours' drive away. Its municipal centre and immediate surroundings contain approximately half the population, while the remainder of the population lives further away from the municipal centre in smaller communities. The largest employer is the public sector, specifically the health sector. A sizeable portion of the working population also works in the private sector, a few work in agriculture and fishery, and very few work in industry. A significant portion of the work force works outside the municipality.

There is one public primary and one public lower secondary school located in the municipal centre and some other public primary schools and private schools elsewhere in the municipality. The only public lower secondary school encompassing grades 8–10 is the main focus of this paper. The municipality has a small education sector within the municipal administration, which is overseen by the municipal council. There is also an upper secondary school in the municipality, which is administered by the county.

While the majority of citizens self-identify as Norwegian, a large part of the population self-identifies as Sami, Kven, or both, often in addition to a Norwegian identity. The Sami are an indigenous people living in Norway, Sweden, Finland, and Russia, while the Kven are an ethnic minority originating from the border area of Tornedalen, in northern Sweden and Finland. The assimilation of the Sami and the Kven were national policy and practice from 1850 to 1950, partly as a reaction to expansionist tendencies on the part of Finland, partly because of Norwegian nation building, and partly as a component of foreign politics against an influx of communist ideas from what is now Finland and Russia (Jensen, 2005; Niemi, 2017). The school was a major area for assimilation policy conducted by Norwegian authorities (Minde, 2003). The Sami and Kven languages were forbidden in school contexts, and the language of instruction was Norwegian. Children were separated from their families in the first grade and placed in state-funded residential schools, where they were not allowed to speak their native language (Jensen, 2005; Keskitalo et al., 2013; Minde, 2003; Nergård, 2013; Nergård & Mathiesen, 1994; Niemi, 2017). Being taken for Sami in public “was a personal defeat”, meaning that this ethnic identity was a stigma and kept as a secret and that such languages were not taught, even within families (Eidheim, 1996; Minde, 2003).

According to a census conducted around 1850, a major part of the population in the geographical area covered by this study was registered as either Sami or Kven. One hundred years later, the majority were registered as Norwegian. Because the census reflects self-reported ethnicity and geographical mobility into the area has not been significant, this shift indicates that the assimilation process was “successful” (Jensen, 2005).

According to Statistics Norway, the case municipal centre does not qualify as rural but, rather, as a town with a relatively dense population (SSB, 2019c). However, the municipality and the municipal centre, with its lower secondary school, are still relevant to rural education because the catchment area of the public lower secondary school is the entirety of the municipality,



including areas that are unequivocally rural. This illustrates that the rural/urban dichotomy, or continuum, is constructed, contested, and difficult to fit to all contexts (Bæck, 2016; Coladarci, 2007; Roberts & Green, 2013; White & Corbett, 2014). For this reason, this paper does not include a rural/urban taxonomy but places its focus on *place* and *context* when addressing spatial inequalities (Bæck, 2016; Coladarci, 2007).

## **Findings: a Lack of Resources**

This section focuses on a lack of resources in the case municipality. This factor is not exhaustive of teachers' work experiences, which among other things, may also include experiences of curriculum or time pressure (Skaalvik & Skaalvik, 2017; Tronsmo & Nerland, 2018). The reason for this uniform focus is this issue's prevalence in the data material; resources came up as a constraint one way or another in most of the interviews, as was observable via participant observation and verifiable through the Norwegian municipality economy database KOSTRA (SSB, 2019b). Not only was the prevalence high in absolute terms but also in relative terms when compared to other case municipalities not included in this paper.

The economic situation in the municipality and at the school was not very good after years of austerity measures. According to the teachers, the lack of resources effects the quality of education the teachers are able to give to their students:

I do believe that we are lagging behind in terms of up-to-date text books and computers. That puts a small limitation on what we could have achieved. This also goes for the use of these kind of tools; we still lack some competency, so that is a constraint in making an even better learning environment. (...) And in city schools, and not only city schools, the students have a computer each, and that opens up ways of teaching. And we don't have that.

A second teacher further elaborates on the situation up until now, pointing to both low points and recent positive changes:

We have had quite large budget challenges, including purchase stops. The earliest purchase stop was in October, two months after school started. We were not allowed to buy anything. We went out of pencils at Christmas that year. (...) There has been a change this year, but the lack of money has been an enormous challenge. There has not been money for anything as long as I have been here.

A third teacher illustrated how she dealt with the lack of resources:

Economy is a key word in the limitations you asked for. I have brought in and bought a lot for this school. Once, I figured it was better to ask for forgiveness than permission, so I bought a loom for 1000 NOK [approx. 100 Euro] online and had my son get it for me. Then, I went to the principle and asked if he could afford it. If not, I told him that I would buy it and gift it to the school. The students deserves proper equipment.

Another teacher compared the situation in education to that in the health sector in the municipality and found that in relative terms, the school sector was well off:

We love to talk about economy. I don't think it is that bad. When I see how we are covered when someone is sick, I realise we are well off. It is not like that in the [municipality] health sector. I have a daughter who works in a nursing home. When she tells her stories, I think, "Thank God, how well off we are." They don't even have people to assist elders who would like some assistance in going outside.

Many teachers are questioning the trust they have in local politicians and the system above that is funding education, also claiming that the sentiment is shared by parts of the local

community. The next teacher argues that the municipality must take education and funding seriously:

Economy is one thing. They [local politicians] have to prioritise school and get the money to go with it. The other thing is to build up an interest in learning.

The economic hardships in both the municipality and the education sector, as described by the teachers above, were also confirmed by observational data and the Norwegian municipality economy database KOSTRA. The latter shows that the case municipality of Grønnevik spends significantly less money, both per student and as a total percentage of the municipal budget, than both similar municipalities and the national average over the last 5 years (SSB, 2019b).

There have also been local school closures and consolidations. The municipal council in Grønnevik closed several public schools and moved the students to the municipal center in the 2000s due to economic hardships. This led to local protests and the emergence of private schools. There was also an ongoing renovation process after the school closures in the municipal centre school, which lasted several years and took place with the students and teachers inside. This renovation process led to many sick leaves among teachers and high turnover in the leadership group due to noise levels and increased stress, and it is probable that this affected student results, according to the teachers. While the situation in Grønnevik may be exacerbated by the renovation process, the underlying issues tied to a lack of resources were a contributing factor in this specific renovation process. The lack of resources is also still an issue years after the renovation period was finished, according to the teachers.

## **Analysis**

The section above outlined a lack of resources that affected the teachers' work experiences and, indirectly, the students. I will now discuss the origins of this lack of resources before returning to the consequences it has for teachers and students.

This paper argues Norway that has a centralised educational system (Archer, 2013; Skinningsrud, 2013, 2014). The degree of centralisation within the system can be viewed in terms of power distribution: the state exerts tight control over education in a centralised system. Issues such as the laws affecting education, curriculum, and funding are decided upon by politicians in parliament, and changes in, e.g., funding can only be achieved through the political manipulation of politicians and their parties by the teacher profession or other interest groups. In 1986, the funding of education changed with NIS-86. Each municipality economy became based on local tax incomes and block state transfers, and the state transfers to education went from being earmarked to being a part of block grants for education, health, and infrastructure. Many rural municipalities ended up with a lack of resources due to rural challenges, which the state transfers did not properly take into account, such as the high infrastructure cost per inhabitant due to low population density, increased overhead costs in the form of teacher salaries, building maintenance per inhabitant for smaller schools, and demographic issues. This leads affected municipalities to make hard prioritisations, often between health, education, and infrastructure, and the 1992 reform allowed municipalities greater autonomy over local school structure (Solstad, 2009; Solstad & Andrews, 2020; Solstad & Thelin, 2006).

The second structural premise influencing the lack of resources in the case municipality is rural demography; many rural municipalities have an ageing population and a domestic out-migration of people of working age. Urban municipalities, on the other hand, experience population growth due to immigration, domestic in-migration of people of working age, and higher birth rates. In total, this creates a situation of rural depopulation and urban centralisation, impacting both welfare costs and the tax base negatively for rural areas (Johansen, 2009; Onsager, 2019). In a way, the rural demographic profile outlined above is a near-constant property of many rural municipalities, including Grønnevik.

The consequences of the combination of rural demography, the NIS-86 reform, and the municipality reform of 1992 within a centralised educational system include both a lack of resources and the closures of rural schools nationwide. Similar findings are supported by Aasland and Søholt (2020), who point out that school closures are one of very few ways municipalities can control education costs because teacher salaries are negotiated centrally. Even though funding was delegated to a lower level of government, Nordkvelle et al. and Skinningsrud argue that there was no change in the educational system, because there were no change in its power relations. The Norwegian state still holds a strong position as a governing and regulating centre of education because its elected assembly, the parliament, still holds power over the law governing education and there is only one national curriculum (Nordkvelle et al., 2017; Skinningsrud, 2014).

### ***Consequences of a Lack of Resources in Grønnevik and beyond***

Austerity measures and school closures have also come to Grønnevik. The findings show the conditioning effect that funding can have on teachers, both as a group and as individuals. The lack of economic resources also led to an unfavorable renovation process, with high leadership turnover and many sick leaves. While the renovation period has ended, the teachers claim that the underlying issue of a lack of resources also affects the quality of education the current students receive, from a relative lack of computers to purchase stops, leading to a lack of basic teaching materials, such as pencils. Structure only conditions and does not determine (Archer, 1995, 2007), and some of the teachers has defied their budget constraints at the cost of spending their own money to ensure that the students have sufficient materials and equipment. The longevity of the economic problems and school closures have led to some of the teachers expressing a lack of trust in local politicians' ability to resolve the issue, a sentiment some teachers claim is shared by many in Grønnevik.

I will propose that the lack of resources in education and especially the school closures can be analysed using the concept of *place as opportunity structures*; “that is, they [places] provide different conditions and barriers that directly and indirectly provide certain opportunities for individuals, and close others off” (Bæck, 2016, 2019). Bæck argues that opportunity structures are more limited for youth in rural areas than those in more urban areas. Access to services such as short commutes to the local school and the situation in the local labor market are a part of the opportunity structure that students face in their choice of an educational trajectory (Bæck, 2012, 2016, 2019). A lack of resources and school closures are lowering the quality of and narrowing these opportunity structures. Within the framework of opportunity structures, a lack of resources and school closures are among the many contributing factors that rural communities face, alongside rural depopulation, the lack of workplaces, and distance creating logistical issues. Currently, a new municipality reform has been implemented, merging smaller municipalities, as well as (among others) the two northernmost counties, against significant opposition within the counties themselves (Regjeringen.no, 2017). This merger took place in early 2020 and has the potential to exacerbate the situation in many rural municipalities because merging municipalities can open up new opportunities for agglomeration and cost-saving like school closures and other austerity measures, worsening access to services and therefore local opportunity structures. It would be interesting to follow this track in future research to determine whether and how these issues will affect rural education.

### ***Understanding the Lack of Resources within the Local Context***

The lack of resources occurred in a place-bound context, and I will now propose one way in which this lack of resources in the case municipality of Grønnevik can be further explored and understood. An important aspect of the historical context of Grønnevik and many other areas, especially in Northern Norway, is the assimilation of the Sami and the Kven within the

educational system. One teacher exemplified some of the effects of assimilation and the current revitalisation in this way:

Currently, it is not negative to wear a Kofte [traditional Sami clothing, *gákti* in Sami] or speak Sami. It is rather an advantage, but when I grew up... My best friend's mother was Sami, and she never spoke Sami when we were present. Now, it is more of an advantage to belong to several camps. It may give job advantages, as many employers prefer a proficiency in several languages.

Some of the teachers thought that the revitalisation of the Kven could not have taken place 20 or perhaps even 10 years ago, and one of the teacher showed me a heated debate in the local newspapers from the mid-1990s, in which she almost lost her job after attempting to promote Kven culture. The negative personal consequences of the assimilation of the Sami and Kven, such as the loss of language, shame, stigma, and defeat, are documented elsewhere (e.g. Nergård & Mathiesen, 1994; Niemi, 2017).

Ethnic history and identity are important parts of the local community, and issues in education should be understood in light of the local community. It would be interesting to investigate whether the historical context of the assimilation of the Sami and Kven through the educational system has affected the interpretation of a lack of resources among the local community of Grønnavik. I suggest that a stigmatised ethnic identity emerged from the assimilation, which in large part, took place in the local school system, with feelings like shame, self-contempt, and distrust being the result of experienced disrespect and a lack of recognition (Eidheim, 1996; Jakobsen, 2011; Minde, 2003; Nergård & Mathiesen, 1994).

While the assimilation policy itself is gone and revitalisation efforts are evident, both in the example above and in literature (Johansen, 2012; Niemi, 2017), it would be interesting to investigate whether these negative emotions were *reactivated* when the municipality began to experience a lack of resources and school closures. This shows the importance of context;

new negative encounters and experiences are perceived and categorised on the basis of former ones, not only on an individual level but perhaps on a collective level as well. These former experiences and encounters do not have to be one's own; they may also be part of prior histories or circulating discourses (Ahmed, 2000). A further empirical investigation of education in Grønnevik and other similar rural communities with a Sami and/or Kven population would benefit from adopting a multi-generational perspective in order to shed light on the intersection between ethnicity and rurality.

### ***Policy Implications***

The theoretical contribution regarding centralised and decentralised educational systems, according to Archer and Skinningsrud, provides direction for policy implications in the Norwegian context. Systemical educational change, including policy change, is unattainable locally due to the characteristics of a centralised education system; changes are made centrally by exerting political pressure on national politicians (Archer, 2013; Skinningsrud, 2013, 2014). This national level is above the micro/meso-level of teachers, schools, and municipalities, and it is larger agents, such as the teaching profession and relevant external interest groups, that must exert pressure on national politicians in order to instigate change in education policy in Norway.

One place to start is with a more differentiated municipality funding system to better compensate for the challenges many poor rural municipalities have. The municipality funding system is currently under review (Regjeringen.no, 2020), and relevant agents, such as teachers' unions, may benefit their members through influencing central politicians. Changing the municipality funding system may not necessarily address all local inequalities and issues, because rural depopulation is difficult to address and the municipalities themselves must prioritise education. One way of investigating education funding could be to explore the



opportunities for specific funds to address the challenges rural municipalities face (Lind & Stjernström, 2015; Onsager, 2019; Rød & Bæck, 2020).

## **Concluding Remarks**

While most Norwegian schools are well off in absolute terms, studying one rural municipality in Northern Norway as a case reveals broader social processes that constrain teacher work experiences in rural contexts. The main finding is the financial constraints these teachers faces, which are caused by framework conditions, such as rural depopulation and the municipality funding system in a centralised educational system. According to the teachers, the lack of resources affects the offerings provided to their students. While this paper has a structural outlook, it is important to note that even in a centralised system, changes may be obtained, e.g., by exerting political pressure on national politicians. We suggest some research-based policy implications to better these conditions: addressing the municipality funding system and exploring the possibilities for funds created to address challenges rural municipalities face. This paper also suggests future research investigate the intersection between rurality and ethnicity, as well as whether the current merging of municipalities and counties has an effect on the opportunity structures of education. Including this ‘wider’ structural and temporal perspective into enquiry and analysis may provide a deeper understanding of both teachers’ work experiences and education in Grønnevik and also the education conditions found in many rural municipalities.

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**Article 2: Structural enablements and constraints in the creation and enactment of local content in Norwegian education.**

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## Structural enablements and constraints in the creation and enactment of local content in Norwegian education

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### ABSTRACT

In Norway, the national curriculum together with the Education Act serves as the foundation for teaching and learning in primary and secondary education and training. Local educational providers are given autonomy to develop local adaptations of the centrally given subject-specific curriculum competence aims. This article explores some structural enablements and constraints tied to teachers' opportunities to make use of local content in curricula in lower secondary schools in Norway, including rural/urban differences. The analysis is based on data consisting of 18 qualitative interviews with teachers in two municipalities and participant observation in one of the municipalities in Northern Norway. The finding of this paper is that the design of the national curriculum allows for local content based on its competence aims. This serves as an enabler for teachers to create and enact local content in education. However, there are several constraints that limit local adaptation for teachers – time pressure, lack of access to content due to finances and distance and losing school control of local curriculum. Also, these constraints have a different impact depending on the geographical context. The article employs Margaret Archer's theories on centralized and decentralized educational systems to analyse these structural enablements and constraints.

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### Introduction

The curriculum serves as the foundation for the learning experiences and knowledge acquisition of pupils in the course of their education. As stated by Priestley and Philippou (2019), the curriculum is the heart of any learning institution. In countries such as Norway, where a national curriculum is set up to provide nationwide uniformity of content and standards in compulsory education, adapting national standards to local circumstances is a crucial part of curriculum implementation at the school level.

In Norway, the Ministry of Education and Research is responsible for all levels of education. The Ministry sets the national curriculum for primary and secondary education and training through The Norwegian Directorate for Education and Training, with a *core curriculum* describing the fundamental values, cultural elements and learning objectives. According to the Education Act, governance of the education system is divided into three different levels. Municipalities are responsible for compulsory education, that is, primary and lower secondary schools; county authorities are responsible for upper secondary education; and the state is responsible for higher education (Kunnskapsdepartementet, 2016). Each level is also responsible for funding; in the case of municipalities and counties, this is based on tax income and state transfers (Solstad, 2009; Solstad & Andræ Thelin, 2006).

Implementation of the national curriculum in schools includes local curriculum development, which school authorities are obliged to facilitate. An important aspect of this has to do with developing a shared understanding of the curriculum, its concepts, principles and competence goals among teaching staff, administrators and school leaders. This is accomplished through dialogue and discussions. Another important aspect of local curriculum development concerns adapting the curriculum to local circumstances to ensure that local needs and priorities are considered. Introducing local content in education is a central part of this effort, which allows regional, geographical and contextual variation in the learning experiences and knowledge acquisition of students. However, there is limited knowledge regarding what degree this actually occurs in Norway and regarding how such efforts are experienced by different actors in the field. Researchers from many countries claim that curriculum is often developed without an explicit spatial awareness or with the urban population in mind (U. D. K. Bæck, 2016; Gruenewald, 2003; Roberts, 2013, 2017; Roberts & Green, 2013), meaning that regional, geographical and contextual variations are missing. The research also shows that introducing local content into teaching can make school more relevant for pupils, for example, for those on the verge of dropping out

(Dentzau, 2014; Solstad & Andræ Thelin, 2006). By integrating local content into the curriculum, learning can be based more on familiar experiences from the pupils' own lifeworld, potentially creating more meaningful learning contexts and improving learning processes. The effect also goes the other way, as local content in education can benefit the needs of local communities (Clarke & O'donoghue, 2017; Roberts & Green, 2013). In this article, we direct readers' attention to how this plays out in Norway by focusing on lower secondary school teachers' experiences with developing and using local content in curriculum in two different geographical contexts.

Teachers play a crucial role when it comes to developing and enacting local curricula. Their knowledge about local circumstances, their willingness to make use of local context in their teaching and their manoeuvring space afforded by circumstance, e.g. policy (Autti & Bæck, 2019; Clarke & O'donoghue, 2017; Solstad & Andræ Thelin, 2006; Tronsmo & Nerland, 2018). According to Priestley et al. (2012, such manoeuvring depends upon available resources and its material and social configuration in the present context, e.g., through educational policy and funding (see also Priestley & Drew, 2017). Furthermore, Priestley et al. (2012) claim that such manoeuvring, together with the beliefs, values and attributes teachers, is able to mobilize in particular situations can provide them with an agency, thus enabling them to engage in processes of change and innovation. Local curriculum is created between general standards and local needs, and if there is considerable distance between general standards and local needs, tensions may arise, as shown in Autti and Bæck (2019)'s study from rural Finland. They state: *'There is a disconnect between a policy level relating to a predominately urban frame of reference and a more practice oriented local level based in rural viewpoints'* (Autti & Bæck, 2019, p. 1). As shown by Autti and Bæck, the urban bias in education policy and the tensions this brings up in work on local curriculum are highly relevant for the processes we document in our study, as we investigate the development of local curricula under circumstances that in many ways differ considerably from general standards.

Local content in education became an important matter in Norway in the 1970s as part of decentralization processes taking place within the national education system at the time (Eilertsen & Solstad, 1980; Høgmo et al., 1981; Solstad & Andræ Thelin, 2006; Solstad & Andrews, 2020). The importance of local content and the link between school and local communities were emphasized in national education guidelines, starting with the national curriculum of 1987 (M87), continuing with the curriculum of 1997 (L97) and to a lesser degree the current Knowledge Promotion reform (LK06) of 2006 (Solstad, 2009; Solstad & Andrews, 2020).<sup>1</sup>

The LK06 consists of a general part and a subject-specific part.<sup>2</sup> The general part of the curriculum acknowledges the differences in pupils' abilities, social backgrounds and local belonging and states that education must be adapted to such differences (Utdanningsdirektoratet, 2015). The subject-specific part includes *competence aims* for each school subject in primary and lower secondary education. A similar template exists in upper secondary education, differentiating between academic and vocational tracks. The *competence aims to provide direction* in terms of the knowledge and ability of the pupils rather than prescribing predefined curricula that the pupils should master.

In order to differentiate between and accommodate for different students and their needs, local school leaders and teachers have the option of developing local learning aims based on the nationally set competence aims of the LK06. It is up to the schools to decide how the aims are to be achieved, and the teachers are granted increased methodological freedom with the intention to facilitate achieving the competence aims under diverse local circumstances. Following this came a set of guidelines for the LK06, the 'Guidance of Local Work with Curriculum', provided by the directorate upon the request of schools and municipalities that served to limit the increased local autonomy introduced by the LK06 (Mølstad, 2015). These guidelines state:

Subject-specific curricula are formulated in a way that gives the school the opportunity to choose content, teaching materials, activities and teaching methods. Local flexibility provides the schools with the opportunity to adapt teaching to the pupils, and through the choices they make contribute to increased learning outcomes (Utdanningsdirektoratet, 2016).

According to Mølstad, stating competence aims is a way of steering learning outcomes through product control rather than the process control represented in the classical way of thinking about curricula. This product control can be understood as part of 'the age of accountability' (Hopmann, 2003, 2008; Mølstad, 2015). The increased level of accountability by focusing on student outcomes can be seen as challenging school and teacher autonomy and the trust in teachers (Mølstad, 2015; Priestley & Drew, 2017). In this way, the intention of developing a local curriculum appears to be to operationalize and deliver the existing national curriculum. This is different from Finland, for example, where teachers are creating a local curriculum approved at the municipality level to exist side by side with the national curriculum (Andreassen, 2016; Autti & Bæck, 2019; Mølstad, 2015). As a consequence, the manoeuvring space for teachers to construct local curriculum and the opportunities for teachers to exert agency both as a group and as individuals are limited by national educational policy and curriculum.

In this article, we take a policy stance to examine the processes and factors that may enable or constrain the making and enactment of local curriculum as understood through the experiences of lower secondary school teachers in two different contexts. We address the following research questions:

(1) *Which processes and factors may enable and constrain teacher's opportunities to make use of local curriculum?* (2) *How has the structure of the educational system and education policy impacted these enablements and constraints?*

We start by presenting the case municipalities before discussing the method and the theoretical framework on the structural context for the use of local content and local curriculum in compulsory education in Norway. This contextualization is important in order to understand the role of local curriculum and the framework it is created and enacted within.

### Case municipalities

Case municipality 1, hereby referred to as the municipality of Grønnavik,<sup>3</sup> is one of the largest municipalities in Norway in terms of land area. It is diverse in terms of geography and nature, with dramatic mountains, rivers, valleys, fjords and rich flora and fauna. It has a population of approximately 5000 people and is approximately a two-hour drive from any significantly larger municipality. Half of the population resides in or close to the municipal centre, with the rest residing in smaller communities scattered around the municipality. The largest employer is the public sector, particularly the health sector. Many people also work in the private sector, some work in the agriculture and fishery sectors, and a few work in the industry. A significant portion of the workforce works outside the municipality and commutes on a daily or weekly basis.

A significant part of the population in case municipality 1 identifies as Sami and/or Kven as well as Norwegian. The Sami is an indigenous group primarily situated in the northern parts of Norway, Sweden, Finland and Russia, and there are several different Sami languages. The Kven is an ethnic minority who emigrated to Norway from Tornedalen on the borders between what is today Sweden and Finland from the 1700s onwards. Both have been subject to assimilation by the Norwegian state, which was a policy between 1850 and 1950. The educational sector played an important role in the assimilation process during this period, negatively affecting the Sami and Kven (Jensen, 2005; Keskitalo et al., 2013; Minde, 2003; Nergård & Mathiesen, 1994; Ngai et al., 2015; Niemi, 2017).

Case municipality 2, Tromsø, is one of the largest cities in Northern Norway, but it also contains areas that are more rural. The great majority of the municipality's more than 70,000 inhabitants reside in the

city, and there has been a constant increase in the population for decades. The city functions as a regional centre, and central institutions include a large hospital, a university, county administration and a significant retail sector. The majority of the population is employed in the public sector.

The two municipalities can be understood to represent different positions in the rural/urban continuum or dichotomy. However, distinguishing between the rural and the urban is in no way easy or straightforward, at least as a binary concept, as both terms are constructed and contested (U. D. K. Bæck, 2016; Roberts & Green, 2013; White & Corbett, 2014). Even so, it is important to keep in mind that the size of the municipal centre alone does not qualify it as rural, as is the case for the municipality of Grønnavik. Instead, the municipal centre of Grønnavik may be considered to be a town with a relatively dense population (SSB, 2019), as it has many features usually associated with more urban-like locations. At the same time, however, this vast school district's only public upper secondary school draws its pupils from the entirety of the municipality, including remote villages that are certainly more rural in nature.

Therefore, this article does not include a working taxonomy of the rural/urban continuum but instead focuses on *different spatial contexts, putting forward contextualization* as a way to address spatial differences (U. D. K. Bæck, 2016). However, in the discussion part of the article, we will address how case municipalities 1 and 2 can in certain ways can be understood to represent more rural versus more urban features, respectively, and as such may represent interesting cases for understanding how the development and enactment of local curricula may vary in terms of rural versus urban locations.

### Methods

The empirical analyses in this article are based on 18 qualitative semi-structured interviews with teachers in the two case municipalities and on participant observation in the case municipality of Grønnavik over a period of three months during the first half of 2018. The interviews were semi-structured one-on-one interviews with a thematic interview guide and lasted about an hour long on average. They were collected with the written consent of the teachers, recorded electronically and transcribed and analysed using NVivo.

The interviews provided comparative insights into how the teachers experienced being involved in developing and enacting local content and local curriculum in education in the two municipalities. Participant observation provided information about institutional practices as well as valuable contextual information about Grønnavik and proved important in order to

understand and analyse the circumstances under which these experiences were formed. The combination of interviews and participant observation was synergic; observational data informed the interviews and vice versa, and it also allowed addressing the possible conflation between self-report and behaviour (Fangen, 2010; Jerolmack et al., 2014). No participant observation was carried out in Tromsø. However, the analysis also draws upon the authors' knowledge and experience of this case municipality. The background of the main author includes work experience as a teacher in Tromsø, as well as teacher training with work placements as part of becoming a certified teacher. Both authors also live in Tromsø, which also makes access to contextual information for the interviews easier.

The data material and analysis represent the teacher perspective. Teachers are in a very interesting position within the educational system, one that may provide them with insight into their own challenges as teachers and challenges faced by students and insight into how both parties relate to the context, for example, the educational system, national guidelines, school leaders, student families and the local community. The teacher position is in the centre of a web of educational relationships and is therefore uniquely practical when considering policy implementation in practice (Barter, 2013).

### Theoretical framework: the centralized educational system

The relationship between the national curriculum and development and enactment of local content in education can be discussed within the framework of the educational system. An important aspect of the educational system is who can initiate change and how it can be done, as this has implications for the creation and content of curriculum. The terms *centralized* and *decentralized* are often used to define the distribution of decision-making power and strategies of governance *within* the educational system. Interestingly, there have been different conclusions about the Norwegian educational system and its degree of centralization or decentralization (e.g., Karseth et al., 2013; Kvalsund, 2009; Skinningsrud, 2014; Volckmar & Wiborg, 2014). According to Skinningsrud (2014), most definitions of decentralized and centralized educational systems only discuss properties within the system and do not describe the systems as a whole. She argues that in order to overcome these problems, Margaret Archer's analysis of state educational systems is a better way of addressing these issues (Skinningsrud, 2014).

Archer defines the state educational system as 'a nationwide and differentiated collection of institutions devoted to formal education, whose overall control and supervision is at least partly governmental, and whose components and processes are related to one

another' (Archer, 2013, p. 54). According to Archer, as the need for education grew the state educational system evolved from being integrated with the church to being integrated with several interest groups within a nation-state. Whether the national educational system became centralized or decentralized was contingent upon the actors involved in challenging the church/state monopoly of education and the resources and strategies involved in their challenge of domination. Archer shows that in general there were two strategies at play – the strategy of *substitution* (competition), which led to several educational bidders and a decentralized educational system (e.g., England) or the strategy of political *restriction* through laws, which led to the state being in control and as a consequence a centralized educational system (e.g. France).

In Archer's terms, a centralized educational system is an educational system governed *centrally* by a leading group that creates reforms and guidelines from a centre of power. A centralized system has a high degree of *unification* of educational laws and educational policies such as guidelines, curriculum, standards and control over private provisions outside the state system. It also has a high degree of *systematization* in the relationship between educational institutions, such as a lack of bottlenecks between the primary, secondary and tertiary levels of education. Another property of a centralized educational system is the low degree of *differentiation* between educational institutions and other institutions, meaning that the autonomy of the educational system is low. Last, the degree of *specialization* in the offerings given to students is low, as the admission requirements, processes and end competence achieved are universal in a centralized system.

In a centralized system, educational demands go through negotiations between representatives from the teaching profession and/or external interest groups and the aforementioned leading group, which in most cases is a sub-part of the central government. The latter then uniformly makes changes for the educational sector as a whole. The distribution of power in the society in general and within the educational system, in particular, is decisive for negotiating positions, the demands the negotiations are about and the educational changes that may or may not happen.

In contrast, in a decentralized system, the structure and content can be decided more locally, for example, through school boards. The degree of *unification* and *systematization* is lower, while the possibilities of *specialization* and *differentiation* are higher, as the greater number of educational actors with actual power allows for a more diverse and institutionally autonomous educational offering. Here, educational change is not only dependent on decisions made by a central government but also on direct pressure from representatives from the teaching profession or other

interest groups. Interest groups like teacher unions and others try to push for educational change not only towards a leading group like in the centralized system, but also more on a local basis, such as towards a local school board (Archer, 2013).

According to Archer's understanding of decentralized versus centralized educational systems, the Norwegian educational system would fall in the latter category. Researchers arguing the same have pointed out that in Norway, the unification and systematization are high and the differentiation and specialization are low. Politicians have direct control over unified laws relevant to education and its institutions, with a strongly unified and standardized core curriculum with low levels of specialization for students aged 6–16 and a high degree of systematization (e.g., lack of bottlenecks) between primary, secondary and tertiary schools (Nordkvelle et al., 2017; Skinningsrud, 2014, 2013; Solstad & Andr  Thelin, 2006). Furthermore, national education reforms in 1994 and 2006 (the R94 and LK06 reforms) brought with them increasing unification and a decreasing degree of specialization at the secondary level (Skinningsrud, 2014; Solstad & Andr  Thelin, 2006). For example, the 1994 reform reduced the number of vocational study programmes from 110 to 13, steering pupils into more unified educational trajectories (Solstad, 2009; Solstad & Andr  Thelin, 2006; Solstad & Andrews, 2020).

Within a centralized system, few real channels of influence exist. It takes a lot for the educational system itself to change, as it has to happen indirectly through a leading group, in this case, politicians in the government and parliament. According to Archer (2013), centralized systems rarely if ever change to decentralized systems, as that would mean both a loss of power and a loss of political capital to spend for the politicians in charge. To the extent that freedom and autonomy are given to actors within the system, it will be in ways that do not compromise the already established power distribution. Freedom and autonomy can, therefore, be thought of as *concessions*, meaning that the freedoms granted by the leading group do not change the power distribution (Archer, 2013; Nordkvelle et al., 2017). Next, we turn to the empirical data and focus on teachers' accounts of how local content and local curriculum are developed and used in practice.

### Categories of structural enablements and constraints

In this section, we attempt to answer the first research question, which concerns *which* processes and factors may enable and constrain teacher's opportunities to make use of the local curriculum. The categories of structural enablements and constraints are based on the qualitative data collected, and relevant examples and quotes are provided.

The first category of constraints and enablements relevant to creating local content and local curriculum comprises an enablement and mandate found within the national curriculum and guidelines in LK06. As mentioned, the process of including local content in teaching is based on local operationalizations of the competence aims given in the national curriculum and the guidelines in LK06. This is done differently in various municipalities. In Gr nnvik, this was done at the school level, where teachers met at the beginning of each school year to discuss the content of the local learning aims. In Troms , this was taken care of at the municipal level. Representatives from each school would meet to discuss the local learning aims for the municipalities as a whole for a set amount of years. As will be shown later, the different ways of organizing this part of the work had consequences for the implementation of local content at the school level.

The teachers in both case municipalities embraced the idea of local content in education and saw it as an advantage for the pedagogical work in school. This is in line with the intentions of LK06, which emphasizes local curriculum from a didactical point of view, that is, as a tool to help engage a broader range of students. The teachers said they often found that introducing pupils to local topics increased pupils' motivation to do schoolwork. It could also be a way of re-engaging pupils who showed a disinterest in certain subjects or in school as a whole. One of the teachers described how she experienced this:

We are doing quite exciting things, and the most exciting is that the students are getting ownership to these histories. Students that haven't shown much interest earlier on are coming forward, and it is so great to see. They are getting a kind of "wow, this famous person is from the neighbouring municipality? And the great-grandchild is a teacher here?" It is very fun to observe.

The teachers were generally satisfied with the possibility of including local content in their teaching. They saw it as inherent in LK06, and one of the teachers pointed towards the open way that the competence aims were formulated as a possible explanation for this:

For example, when working in history and social science and larger conflicts, there are no mention of which conflict [in the competence aims] to teach. And when working with WWII, it is natural to look into the local context. There were prisoner camps only a couple of hundred meters away from here, and teaching about the prisoner camps and the histories of the incarcerated [seems natural].

The formulation of competence aims was perceived by the teachers as a possibility for manoeuvring and

creating local content. Schools and municipalities are encouraged to make local adaptations on didactical grounds, but for the teachers, local adaptations also meant an opportunity to include a focus on local culture and identity. The teachers emphasized the importance of teaching students about their own local culture and history and saw this as important to help the pupils gain a sense of pride about where they come from and to nurture their local identities. One of the teachers expressed this in the following way:

It is important that the children here gets a sense of ownership to our culture, to Northern Norway, to the war. We have had people in here that experienced the evacuation during WWII. And it is important that the children experiences that, it is their history, and it is important that they become proud of their identity (...). In that way, they can gain ownership to what they learn. And that is what we have used local curricula for.

Local curriculum as a space to promote local identity and culture was particularly prevalent in the Grønnevik interviews. As mentioned, Grønnevik is a multi-ethnic community where the presence of both indigenous Sami and the Kven minority is important (Jensen, 2005). The teachers were conscious of making connections to the ethnic history of the place in their teaching and also to do this across different subjects, as the following quote illustrates:

And Kven culture, we have a Kven history. And when one teaches Norwegian [as a subject], it is natural to work with the history of the Kven, also across subjects. This is also the case with the history part in social science, I think it is very fun, and the possibilities are endless.

Another way of incorporating Kven ethnicity into education was through an annual Kven week. Building up to the Kven week, the teachers would incorporate some basic Kven history and language into the regular classes, ending in an open day at school with student presentations, etc. For the local teachers and the students and their parents, the Kven week and the school also became an arena for revitalizing the Kven identity, which historically has been looked down upon and which has only quite recently begun to be revitalized in northern Norway (Jensen, 2005; Johansen, 2012; Kommunal- og Moderniseringsdepartementet, 2018; Norske Kveners Forbund, 2018; Storaas, 2007). It is interesting to note that when it comes to the incorporation of the ethnic historical legacy of this rural municipality into teaching, it was clear that for the teachers, the ethnopolitical project of ethnic revitalization played an important part. In other words, it not only had to do with fulfilling the obligation of introducing local content in school (inherent in LK06) but it was also about local

identity and ethnopolitics. Indigenous education and ethnic revitalization were thus to some degree included in the local content category by local teachers.

Even though the teachers in this study appreciated and emphasized the importance of local content in their teaching, they were also aware of issues that made it harder to prioritize. These problems are categorized into three types of constraints having to do with *time pressure*, lack of *access to content due to finances and distance* and *losing school control* of local curriculum. These will be analysed in more detail in the discussion part of the paper.

### **Time pressure**

Teachers in both case municipalities embraced the idea of local content in teaching, and they were interested in increasing the use of local content in their own teaching practice. The most cited reason for not being able to increase local content was '*not having time*'. The teachers put forward the amount of competence aims in the curriculum as one explanation for the shortage of time. In their critique of the competence aims in LK06, teachers' interest organizations have also stated the aims are too numerous and too comprehensive, leading to superficial treatment of the curriculum (Ulvestad, 2018). The teachers also felt that more and more tasks were given to the educational system and the teachers, taking away valuable time to focus on the students and their learning processes. They gave numerous examples of activities that take time away from teaching, such as testing regimes and bureaucracy associated with solving bullying cases. According to the teachers, 'paperwork' and reporting were increasingly competing with and sometimes replacing the planning of learning activities, including developing, planning and teaching local curriculum. One of the teachers said she felt that the workload had increased during her years as a teacher and that she experienced this as highly problematic:

I am currently in a process where I am trying to find out whether being a teacher is worth it. The teacher profession has become very demanding in regards to student evaluation. (...) It is very good on a very fundamental level to do so, but it is very time demanding (...) There is a lot of documentation work to be done on top of that; I have meetings with students who need individual training plans, and this demand calling-up papers and reports. And there are student collaboration dialogues with individual students. And then there is our digital platform, where everything is supposed to be documented. (...) So the workload is very big.

Another teacher reflected up some of the reasons behind this:

Well, everything is supposed to happen through the school. (...) I believe that education policy has become hard to anticipate, politicians are making decisions, but they don't understand the consequences, as they do not know enough about school and education, both as an organisation and as a workplace.

The quotes above illustrate a growing concern among the teachers that new things and responsibilities are put into the educational system, but '*nothing is taken out*'. Another concern often brought up by teachers was the need for proactive documentation of classroom activities, often tied to complaints about grades or behavioural problems in school. For example, when a complaint about grades is made to the county by parents or students, the county investigates whether there is any validity in the complaint. The teachers then have to justify the grades by documenting the individual student's ability to vis-à-vis the competence aims. As the teachers cannot know beforehand whether which or any students or parents will complain, they tend to proactively document more than what is really needed as a precautionary measurement, leading to an increased workload.

### **Lack of access to content due to finances and distance**

The second most mentioned issue in terms of challenges when it comes to developing and enacting local content and local curriculum in teaching was related to the financial problems many municipalities are facing. As mentioned earlier, municipalities are responsible for funding public elementary and lower secondary schools through tax income and state transfers. The municipality of Grønnvik, in particular, had economic problems, and this also affected the education sector. There had been a round of school closures, and periodic halts on purchasing had also led to a lack of educational tools, such as pencils and sketch books. There was also a lack of computers at the time of the interviews, and according to some of the teachers, this impacted students' computer literacy. The lack of economic resources also manifested in limited access to content deliverers, such as museums. In Grønnvik, visits to such places were also made challenging by the high cost of travel:

I miss going to museums with students. I like museums and my own children has visited almost all museums in the North Calotte, but there is not many others who have. I grew up [in a neighbouring municipality] with museums and art displays, but those who grew up here, the parent generation and those a bit younger have not.

While the above quote is concerned with access to museums, the economic worries also extend to any travelling outside the immediate surroundings of the

school due to increased costs and time spent away due to long travel distances. Several of the teachers sometimes spent their own money and time to acquire tools to teach local traditional crafts or to take children out into the local environment. They spoke about the financial and logistical difficulties at length, arguing that economic problems extend far beyond the occasional museum visit, visiting local places and investigating local nature.

The municipality of Tromsø had also experienced economic problems, but at the time of writing these were not as pronounced as in Grønnvik. The discontent of the teachers in Tromsø was more connected to the actual priorities of the politicians and the municipality rather than the lack of resources. None of the teachers mentioned finances as an issue in using or creating local content. They described the local offering of museums and other cultural institutions in the municipality as good.

### **Losing school control of local curriculum**

The last type of constraint was found only in the urban municipality of Tromsø, and it is important to note that this issue is not necessarily found in the same form in other municipalities. According to the teachers, local competence aims were reworked at the municipality level; a selection of local teachers from different schools was grouped together to formulate local competence aims based on the national guidelines. These 'reworked' local competence aims were then regarded as obligatory for the schools in the municipality.

Not much is found about this practice in municipality policy papers, except that the articulated aim behind this practice is to unify the Tromsø school. One of the tools is to create a common progression between the different schools, and that the practice started back in 2014 (Tromsø Kommune, 2015). The motive behind creating locally unified competence aims according to the teachers was to streamline the progression in education, giving the students and their families a choice of which school to attend and allowing a smooth transition if they decided to change schools. According to some of the teachers, the idea behind the first sentiment is to create a 'market' for education, creating competition between schools while offering students the possibility of choosing which school they would like to attend based on student and family preference. While the idea is to benefit both the municipality as a school owner and the student as a 'customer', the practical implications of this local centralization can become an issue; these are discussed below.

## Discussion

The teachers interviewed for this study were predominantly positive when it came to introducing local content in their teaching practice, and the mandate given to them through the LK06 reform was experienced as a positive enablement. At the same time, the data showed that there are processes and factors that serve to constrain the teachers' opportunities for actually doing so. The two most common constraints were lack of time and lack of resources. In this section, we try to address the problem as formulated in the second research question '*How has the structure of the educational system and education policy impacted these enablements and constraints?*' We will answer this question by explaining the structural focus on educational systems and Archer's centralized educational system (Archer, 2013).

To understand why the enablement of local adaptation of curriculum is the way it is, we revisit Archer's arguments on centralized educational systems and specifically the concessions a centralized educational system makes (Archer, 2013). The local operationalization of centrally given competence aims as a whole can be seen as a concession and a compromise between general standards and local needs. It gives teachers the opportunity to create local content adapted to the student's needs and the local identity, including ethnopolitics. At the same time, allowing teachers this opportunity does not change any power relationship or positions, as the state still has a strong role as deliverer of the competence aims. The local operationalization of centrally given competence aims can, therefore, be thought of as a currently working concession or compromise, where both teachers and the state get sufficient of what matters to them.

Time pressure and an excessive workload for teachers as exemplified in the result section have been pointed out by several researchers as problems strongly related to teachers' working conditions, which can lead to emotional exhaustion, teacher attrition, burnout or leaving the profession (Beck, 2017; Skaalvik & Skaalvik, 2017, 2015; U.-D. K. Bæck, 2015). According to the teachers, time pressure came from many sources, but the amount of competence aims in LK06 was considered the main culprit. Could this constraint to introducing local content in teachers' teaching practices be overcome in any way? As outlined in the theory section of this article, Archer (2013) argues that there are few channels of influence in a centralized educational system and that change is usually introduced by a leading group, in this case by central politicians. This means that the amount of competence aims can be changed only through negotiation between the leading group and interest groups of a certain size, position and power,

such as teacher unions. This will be different within a decentralized system, where the municipality or even a local school board can decide their own curriculum, and local interest groups such as local industry or teacher groups can impact the negotiations (Archer, 2013). At the time of writing, the teachers' concern about too many competence aims in education has been recognized to a certain degree by central politicians and has been addressed in the new guidelines and educational reforms set for 2020. A significant decrease in competence aims has been decided upon; in some subjects the number of competence aims will be only half of what there were in the fall of 2020 (Utdanningsdirektoratet, 2019). This change is welcomed by the Union of Education Norway, who believes the decrease in competence aims will increase teacher manoeuvring space (Skjong, 2018).

Some of the time pressure also seems to derive from the accumulation of documentation tied to student evaluations, quality control systems, etc. The increase in documentation work can be understood as a result of politicians' increased interest in external controls and product control within education, for example, through national and international test regimes (e.g., PISA). An important aim in this regard seems to be to reassure the public that all measures that can increase school outcomes have been implemented (Hopmann, 2003, 2008; Mølsted, 2015). Political pressure on leading politicians could be a way to decrease unnecessary paperwork, as shown with the competence aims above.

While time pressure in itself is found to be common in teachers' work experience across different spatial contexts, it may still have an effect on spatial inequalities. Many researchers argue that curriculum is made with the urban population in mind, or at least without much thought for the more rural population (Autti & Bæck, 2019; U. D. K. Bæck, 2016; Gruenewald, 2003; Roberts, 2013, 2017; Roberts & Green, 2013). Spatial awareness in LK06 is somewhat vague. To some degree, LK06 acknowledges the need for local adaptation on behalf of the students, and there seems to be no actual limit in LK06 to create local content as long as one is operationalizing centrally given competence aims. At the same time, as pointed out by Solstad and Andrews (2020), LK06 is less spatially aware than its predecessor L97. The section about the locally oriented school is left out, and there is not 'any mentioning of the pedagogical use of local teaching resources or the school's active role in the local community in the new overarching values and principles for primary and secondary education which was approved in 2017' (Solstad & Andrews, 2020, pp. 300–301). If there is an urban bias in the curriculum in LK06 and subsequent reforms and in teacher materials such as textbooks, etc., then the workload needed to make local adaptations could be greater



in rural contexts than in urban ones. Some teachers argued along these lines, stating that some of the competence aims felt irrelevant for rural Northern Norway and that teaching material and textbooks seemed to have been made for the capital area in the southern part of Norway. Given that time is a valuable asset and time pressure exists equally across contexts, rural contexts could come out as the losers because the adaptation effort would be more time-consuming. However, this argument requires further validation through more empiric substantiation and more in-depth exploration and discussion.

For our two case municipalities, the spatial relevance is clearer when it comes to the second category of constraints to teachers' manoeuvring space for creating local content, namely the lack of economic resources. When it comes to the two municipalities in this study, this problem was more often addressed by the teachers in Grønnevik. If we try to understand this through the concepts of centralized versus decentralized education systems, a relevant point of departure is how school funding is set up. Funding is different in a centralized educational system than in a decentralized one, as the leading group in the centralized system has control over the funding of the educational system. In Norway, the municipal level is responsible for elementary and lower secondary education. Pre-1986, school budgets were approved by the state, and funds were earmarked and transferred to the municipalities based on the approved budget. In 1986, the government gave the municipalities responsibility for the funding and administration of public elementary and lower secondary schools. The funding of schools is currently derived from municipal tax income and transfers from the state. Municipalities in more rural areas tend to experience dwindling populations with ageing demographic profiles and lower socioeconomic status than their urban counterparts, negatively affecting the taxpayer base of the municipalities and thus the funding of schools (Johansen, 2009; Solstad, 2009). The state transfers are primarily based on the number of inhabitants in the municipality, with some modifiers. They do not adequately reflect differences between municipalities in, for example, health or infrastructure costs or the overhead differences between school sizes due to, for example, teacher salaries and building maintenance. When resources are experienced as scarce in municipalities under economic pressure, often due to low tax incomes and high welfare costs related to an ageing population, municipalities have to prioritize between public services, for example, health and education. This has led to a strained economic situation for the educational sector, and in poor rural municipalities schools have been closed down or amalgamated in order to save money (Kvalsund, 2009; Nordkvelle et al., 2017; Solstad, 2009; Solstad &

Andræ Thelin, 2006; Solstad et al., 2016). Similar issues relating to rural schools are also found elsewhere (e.g., Tieken and Auldridge-Reveles (2019), Biddle and Azano (2016), and Stelmach (2011)).

This does not mean that municipalities in more urban contexts do not experience economic hardship that affects the education sector. Tromsø, the more urban municipality in this study, is in a situation where harsh economic priorities affect education every year. However, it is important to note that although economic difficulties are present in both case municipalities, this has had a more severe effect on the development and enactment of local content and curriculum in education in Grønnevik because the more remote location makes it more expensive to visit museums or other relevant institutions both in terms of money and time. In Tromsø, however, schools can rely more on the local offering of educationally relevant institutions and activities, lowering travelling costs and time expenditure significantly, in addition to benefitting from being part of a large-scale operation.

Changes in the central funding system occur like most other political changes in a centralized educational system; political pressure and negotiation with the leading group of politicians are necessary measures. Negotiating for a more differentiated funding system targeted at addressing the poorer rural municipalities could change the material context and increase the manoeuvring space to create more local content (Solstad, 2009; Solstad & Andræ Thelin, 2006; Tronsmo & Nerland, 2018). One of the many possible ways of looking into the municipality and school funding system, at least for elementary and lower secondary education in a Norwegian context, could be to explore the opportunities for expanding the county governor's discretionary funds and mandate. The county governor is the supervising authority over its municipalities, and with the mandate comes discretionary funds from the government that can be given to municipalities to address local inequalities not accounted for in the municipality funding model. The annual size of this fund nationwide is slightly below 1 billion NOK (approximately 100,000 EUR) for 2020 (Troli & Sande, 2019). One suggestion is to expand the fund itself, as an eventual change in the municipality funding formula for the state transfers may not necessarily address all local inequalities and issues.

The third category of constraints has to do with losing school control when it comes to developing and enacting/implementing the local curriculum. Again, it is important to note that this issue is found within one urban municipality, and it may very well be different in other municipalities. It is included and discussed here, as it relates to the definition of power over 'what is local' and what constitutes 'local' in the creation of local curriculum. If the municipality is small and/or the differences among the schools are small, for example, in terms of size, historical context and livelihood

context, the impact of centralizing the creation of local competence aims can be negligible. In larger municipalities with smaller schools in more rural areas outside the cities, the smaller schools might lose out in the process of creating local learning goals based on centrally given competence aims, and the local curriculum could become an urban curriculum. It also has the potential to be an antagonist in terms of losing school control and teacher autonomy and manoeuvring space by taking away the power of individual schools and teachers to make adaptations for individual students as granted by policy by moving it up to the municipality level (Andreassen, 2016; Mølsted, 2015; Tronsmo & Nerland, 2018; Utdanningsdirektoratet, 2016).

The loss of school control over local content is not a direct result of the centralized educational system like the previous two structural constraints. However, some remedy can come from the government and relevant ministry, as they can repeat their insistence upon granting autonomy to create local content and curriculum to the schools themselves (Utdanningsdirektoratet, 2016). However, the solution to this problem is most likely to be found at the municipality level. A possible solution is for the municipality to shift the work of creating local competence aims down to the school level, or at least making participation in creating and using a unified set of local competence aims at the municipality level voluntary. The last possibility would be to assign competence aims to a specific school year without deciding the content, as that would address the political wish of streamlining education without taking away school control and teacher autonomy over the content of the local curriculum and competence aims.

### Concluding remarks

This article has explored and discussed processes and factors that may enable and constrain teachers' opportunities to make use of local curriculum within the Norwegian educational system. The competence aims of the national curriculum in combination with a local adaption of those aims serve to enable the creation of a local curriculum. This enablement can be analysed as a concession given from the state, as allowing teachers this opportunity does not change any power relationship or position, as the state still has a strong role as deliverer of the competence aims. While the current educational reform gives teachers a certain amount of autonomy, it does not necessarily mean a larger manoeuvring space for teachers to include more local content and local curriculum due to the structural constraints of creating and enacting curriculum.

These constraints fall into three categories – *time pressure*, *lack of access to content due to finances and distance* and *losing school control of local curriculum*. None of the constraints are intended consequences of the national guidelines and national curriculum, but

all affect the manoeuvring space teachers have when trying to create and use local content and local curriculum. This paper offers a structural explanation of why the enablement and constraints have emerged by looking into the structure of the educational system itself. Archer's concepts of centralized and decentralized educational systems allow us to understand why and within which structures the constraints have surfaced, as the power relationships in a centralized or decentralized system direct how educational change (or reproduction) can happen.

We suggest some research-based ways to address the factors that constrain teachers' opportunities to create and enact local content and local curriculum. Some of the time pressure can and potentially is already dealt with through central negotiations for new educational reforms (e.g., reducing the amount of competence aims). Economic inequality can also be dealt with through the funding system of school owners, in this case municipalities. In the Norwegian case, this could be addressed, for example, by expanding the discretionary funds given to county administrations. The last category of constraints, losing school control of local curriculum, is the most fleeting because it might not exist in the exact same form across municipalities. However, compromises such as assigning competence aim to certain age classes but letting the schools themselves fill in the local content and curriculum are possibilities. The finding that the issues presented in this paper are contextual and that the power struggle between general standards and local needs is found to be strong outside of national guidelines underlines the need for researchers and policy designers to look into context and practice as well as relevant national guidelines in order to understand how educational policy affects its recipients and how to improve it.

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### Notes

1. The national guidelines for the curriculum are also currently being reformed, set to be introduced in the fall of 2020, but this paper is concerned with LK06. See Utdanningsdirektoratet (2019). Fagfornyelsen Utdanningsdirektoratet [The Norwegian Directorate for Education and Training].
2. The reformed national guidelines for the curriculum, set for implementation in 2020, will keep the form of competence aims. See Utdanningsdirektoratet (2017). Strategi for fagfornyelsen av kunnskapsløftet og kunnskapsløftet samisk Utdanningsdirektoratet [The Norwegian Directorate for Education and Training].
3. The authors have chosen to not disclose the real name of case municipality 1 to keep the identity of teachers and students that have participated in the research

project safe as promised to the participants and national ethics board NSD. We have chosen to disclose the name of case municipality 2 for reasons further discussed in the methods chapter; the authors are currently living in Tromsø. We have also found this disclosure admissible because revealing the municipality does not reveal the school, its teachers or students.

## Disclosure statement

No potential conflict of interest was reported by the authors.

## Geolocation information

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### **Article 3: Structural Constraints on Teachers' Work: Comparing Work Experiences in Rural and Urban Settings in Northern Norway.**

RØD, D. A. V. upcoming 2021. Structural Constraints on Teachers' Work: Comparing Work Experiences in Rural and Urban Settings in Northern Norway. *In: ARCHER, M. S., BÆCK, U. D. K. & SKINNINGSRUD, T. (eds.) Social structures and processes in the Norwegian Education System.* London: Routledge.



#### **Article 4: Reflexivity and educational decision-making processes among young students.**

STENSETH, A.-M. H. & RØD, D. A. V. upcoming 2021. Reflexivity and educational decision-making processes among young students. *In: ARCHER, M. S., BÆCK, U. D. K. & SKINNINGSRUD, T. (eds.) Social structures and processes in the Norwegian Education System.* London: Routledge.





