

## **EQUITY, ECONOMICS AND GEOGRAPHY: TOWARDS A COMPREHENSIVE DEVELOPMENT OF THE SOCIAL DIMENSION OF SKILLS FOR LIFELONG LEARNING**

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The classic issue of the distribution of income and wealth and the criteria in order to establishing a desirable distribution axiologically, equitable, have brought back to the center of public debate in developed countries. The recent economic crisis and the mass unemployment levels from European societies, the questioning of the institutions of the Welfare State, the reformulation of the international division of labor stemming from globalization (Castells, 2006), and the impact on environment of a growing world population have all been key contributors. In the same sense, the concept of sustainable development incorporates environmental and economic dimensions with a perspective of great interest for the teaching of economics and geography. Besides, the new globalized society has revealed that we need to revise the traditional educational conceptions and methodologies and redirect them to the development of skills that enable lifelong learning possibilities. In this context, one of the challenges facing educational systems is to explore the incorporation of new contents and forms of collaboration in order to facilitate a full perception of the complex social reality in which citizens have to operate. This paper analyzes the relevance of the concept of Equity to achieve a genuine development of the social dimension of these key competences and proposes a treatment of it to incorporate the complementary visions of Economics and Geography, as disciplines of the social insufficiently covered so far, that have become essential to develop future citizens integrally formed, critics and socially active in democratic life.

### **1. EQUITY, ECONOMICS AND GEOGRAPHY**

The troubled relationship between efficiency and equity is a central topic of Economics since it was configured as an autonomous scientific discipline in the late

eighteenth century. The most elaborated original formulation was by Ricardo with his analysis of the relationship between wages and profits. Without significant modifications, it is also included throughout Marx's theory of labor value and surplus. In a more refined and mathematically formalized version of neoclassical late nineteenth century, the distribution of income occurs in the markets for productive factors, traditionally grouped in natural resources, labor and capital. Each factor should be paid according to its marginal productivity and the resulting distribution. Under certain assumptions, this can be predicated as technically and economically efficient to configure the mythical Walrasian General Competitive Equilibrium based on the concept of Pareto efficiency. Even this model, orthodox paradigm, assumes that the initial endowments of the factors determine the final distribution of income. This is because agents have different physical and innate intellectual capacities and, besides and also access to different heritages. Random and experience are additional corrective factors that also affect the process.

As a result, the income distribution is unequal and it requires a definition of what is socially desirable. Economics has studied it using the concept of Social Welfare Function that connects Ethics, Economics and Politics (Goerlich and Villar, 2009 for an updated review). From a more heterodox point of view, institutionalists or structuralists (and the center-periphery theories formulated in the sixties and seventies), have stressed the need to overcome the idealized models of liberals. They have adopted multidisciplinary approaches that underline the connections between social and political power relationships, allocation procedures, accumulation of income and wealth in society. This rapid review demonstrates the need to clearly differentiate the merely descriptive aspects of economic relations, linked to the territories and the people involved in them, from those requiring axiological dimension of criteria determining the justice of the distribution.

Therefore, the first group of essential aspects refers to the quantitative and qualitative description of personal, territorial, functional and sectorial distribution of income produced from the information provided by the National Accounts (Carrasco, 1999). We should also add gap analysis between specific groups of the population: women, the elderly, ethnic minorities, disabled and workers by level of educational qualification and experience, immigration status or job insecurity. The definition of social exclusion and poverty in relation to a system of individual and social needs offers a specific field that also requires a separate discussion. The paper reviews different quantitative tools used to measure inequality in income distribution that have educational potential.

These positivist analyses, however, do not answer the question because immediately it is necessary to include the moral issue of equity. Economics was born linked to Bentham's utilitarianism and Moral Philosophy. From its origin, our science has had a clear concern about the ethical aspects of the distribution of resources in society that has been developed in the Economics of Welfare, a specific branch of these knowledges

configured by different authors, since Mill to Sidgwick, Marshall or Pigou and, more recently, Arrow and Samuelson. Sen also made essential contributions, as much in the formal sense of his early works (Sen, 1973), as in those more thoughtful and recent pieces, linking the ideas of freedom and justice in order to establish the severity of poverty as a shortening factor for the development of capabilities in people (Sen, 2000). Other reference works are those from the Economics of Inequality by Atkinson, Lambert and Cowell (Atkinson and Bourguignon, 2000). Our paper also reviews the approaches of Rawls (2008), Nozick (1974) and Doyal and Gough (1994).

Moreover, Geography presents its own challenges and developments. In Spain, for instance, curriculum tradition determined by legal mandates (Capel *et al.*, 1984) was orientated towards Physical Geography. Although indicated by some studies (AGE, 2000), the educational reforms of the eighties had a strong innovation process in methodologies and contents: some groups of teachers began to work in a more coordinated fashion with other disciplines in the social sciences, especially History. They worked with some aspects of poverty and social inequality, including many genuinely no geographical or strictly within the scope of the social sciences. However, even today it has not been immersed in the development, within non-university education or in initial teacher education, in a perspective that emphasizes the relationship between efficiency and equity regarding which would be most useful with the connections between Economics and Geography. Probably, the closest proposal was made by the so-called Radical Critical Geography or Geography in Human Geography and Economic Geography. Although in the seventies there was an international trend to link all social problems and geographical practice, especially from perspectives of neo-Marxist orientation which analyzed aspects such as privatization of public space and its appropriation as a function of social, or from professionals of Geography concerned about the environmental sustainability of development and the status of women or ethnic minorities survival of endangered or acculturation status (Adams, 2000). Anyway, this view did not achieve enough and continuous presence. The impact that globalization has on the territories and populations, along with the incidence of economic crisis in the developed world, might create a good argument to retrieve this approach and boost its presence in Education from an ethical reflection related to the role of geographical knowledge as was proposed by Sack (1997).

## **2. EQUITY AND COMPREHENSIVE DEVELOPMENT OF THE SOCIAL DIMENSION OF SKILLS FOR LIFELONG LEARNING**

The configuration of the social and civic competence in general and, in particular, the civic education and its presence in educational systems is still a controversial issue. Although the idea of citizenship dates back to Ancient Greece (Heater, 2004),

the heated controversy that has produced its recent inclusion in the Spanish curriculum could be a paradigmatic example, repeated in different countries (Sears and Hughes, 2006), regarding the difficulties in defining a balanced consensus on approaches to be considered for its treatment. The reasons are several. First, it is a complex subject and requires a multidisciplinary definition, incorporating diverse perspectives from the historical to the political, the philosophical, the geographical and the economic points of view. Second, and fundamentally, it is heavily loaded with axiological dimensions linked to the perspective of the social role of education and the same conception of how society should be configured. Finally, it requires a methodological debate to address its educational approach. From the selection and sequencing of contents, the initial and continuing teacher education, through to the most appropriate teaching resources and including a deep ethical reflection on the position of the teacher in relation to the social model of reference determined by the curriculum needs to be included.

As Sears and Hughes suggest (1996), a previous issue is the definition of what we mean by citizenship. Different analyses have adopted a variety of perspectives: historical (Heater, 1990; Riesenberg, 1992), philosophical and political (Barber, 1984; Ichilov, 1990; Kymlicka, 1989) or of gender (Pateman, 1970; Phillips, 1993), with others not included. Proponents of educating for citizenship affirm that what turns out to be more relevant is its normative dimension, seeking to define what should be considered desirable citizenship (Hughes, 1994). From democratic liberal perspectives, Woyach (1991) argues that there are different conceptions of democratic citizenship which would be located on a continuum from populism to elitism. In a similar vein, Ichilov (1990) thinks that it can be considered the existence of two ends of citizenship: from restricted to extended. These different views on the role of citizens in society come, obviously, from longstanding philosophical debates (Carnoy, 1984; Heater, 1990; Kymlicka, 1989; Pratte, 1988; Riesenberg, 1992; Woyach, 1991).

Although these works refer to western-style democratic societies, they differ significantly in their vision of the nature of citizenship, especially regarding which citizens should be involved in public affairs and in the conditions for making such active participation possible. In the democratic field, between radical activism today translatable in the movements of real democracy or direct democracy, and the most elitist and conservative or liberal approaches, there is a range of possibilities. Because of this, reaching a consensus on a definition has become increasingly difficult: the individual and personal responsibility versus the collective references, the local or national point of view versus the global or planetary vision, the racial, religious, linguistic and sexual orientation minorities and their identities in opposition to the community or against traditional perspectives or radically conservative governments, etc. In the context of this discussion, a contribution of great interest was made by Turner (1993). He states that

in contemporary European society the issue of citizenship would have come back to the center of political and social debate as a result of the dilution of national borders produced by the process of integration derived from the EU constitution in the broader context of globalization (Castells, 2006), and the reconfiguration of local identities called glocalization (Robertson, 1992). In this new situation, Turner underlines that the problem of citizenship requires the consideration of two fundamental dimensions: on one hand, the nature of the subjects belonging to the nation-states under review, and in the other hand, the equitable and ecologically sustainable management of resources.

The article describes in detail, using a literature review, how most of the institutional proposals on civic education have been concerned about the development of the content of what they consider democratic citizenship in its various expressions. Thus, some have focused on legal and political issues, others used models of citizenship which refer to the active or passive participation of individual and collective character, and others have emphasized the importance of living and arbitrate the dispute procedures for conflict resolution. However, most have a very inadequate treatment of the economic dimension of social reality in general and, in particular the equitable distribution of income and wealth. The final result has been a partial and unbalanced curricular development of social and civic competence. In this sense, from an educational point of view, it is necessary to perform a critical review of the approaches to address the circumstances of the aforementioned global society. Are traditional curricula and teaching methodologies useful and desirable nowadays in so complex and dynamic environments? Should we go on omitting the training of students in these crucial economic and geographic aspects of social life?

An important difficulty comes from the part of the critical discourse that confuses economics as a science, with a strong weight and epistemological identity and a variety of orthodox and heterodox academic discourses, with capitalism as an economic system. From this same point of view, some authors of Critical Pedagogy do not appreciate the potential that these knowledges would have to set up a truly informed and critical citizenship, also formed for social entrepreneurship in order to act in the way they preach necessary. Regarding this issue, the major limitation of all Critical Pedagogical Theory, as in other Marxist and neo-Marxist analysis, is that its good description of reality, is not necessarily followed by an alternative project safeguarding individual freedoms and the deepening of democratic life and the extension of values of solidarity and equality, such as they have been developed in the contemporary world nowadays. Probably, it is necessary to articulate intellectually a realistic proposal for liberation pedagogy in postmodern globalized societies, with an updated and contextualized current western social reality discourse that should go beyond denunciation and denial and to become a strong alternative and possible instrument in the long journey of building a new society

that is more equitable and ecologically viable. At the other end, surely, are those who believe that these perspectives should not be incorporated into the educational system with a depth and breadth that could question the neoliberal model which is at the center of mainstream thinking; they defend a model in which economic contents should not go beyond the transmission of the reproduction techniques for business management. Finally, the omission of economic dimensions of citizenship education could also come from the primacy in the process of setting curricula and teacher training programs of humanists, interpretive and preferably qualitative methodologies speeches, commonly present in disciplines such as History, Philosophy and Pedagogy, above those more empirically oriented social sciences as Economics or Geography. The situation arising from the economic crisis, the global context and the resulting social situation are claiming to overcome these lacks.

### **3. EQUITY, TEACHERS AND PROFESSIONAL ETHICS CONCEPTS**

The professional practice of teaching requires a personal and well founded reflection to make possible the connection between the epistemological features and the content that are subjects of teaching and didactic presentation therefore connecting teacher and student. Without this initial reflection, usually represented by the metaphor of the didactic triangle, teacher's practices are disjointed and conflicting. As stressed by Zeichner (1993), reflective teaching is an essential exercise for the professional development and training of these professionals. This concept was introduced by Dewey from the distinction between routine activities directed by impulse, tradition and authority. These are typical of non-reflexive and uncritical teachers subjected to external address without awareness of the purpose of their work. Alternatively, reflexive actions involving the active, persistent and careful consideration of the fundamentals of all their beliefs or their practices and the consequences to which they lead to would be usual in the reflexive docents.

Since the problem of equity appears strongly impregnated with axiological aspects, it is necessary to specify, through reflection on own teaching practice model, the orientation that should be given to the organization of resources and the selection of contents in order to establish an ethical framework for professional behaviors of teachers in these subjects. Studies such as Evans (1989) for history or Westheimer and Kahne (2004) for Civic Education, for example, explore the conceptions of teachers in this field. In the teaching of Economics, the debate about these questions is wide and deep and refers to the selection of contents and methodologies that are more frequently employed. A review of them can be found in Becker (2001 and 2008), Knoedler and Underwood (2003), Catano (2004) or, with the greatest interest for teaching in secondary schools, in Colander (2004). Synthetically, we could propose three stereotypical categories of

teachers concerned about the introduction of equity issues. These could be used as a reference for further investigations that would verify its existence by empirical research:

a) The aseptic technician. His main concern is the measurement of the distribution processes and/or inequality and productive sectors or geographic location. This kind of teaching does not challenge the established social order or the result of the operation of market mechanisms in the distribution of income and wealth. Also, as this teacher is not involved in the analysis of local problems they might appear to be problematic and does not encourage active social participation.

b) The social reformer. This teacher seeks comprehensive training of students so that they develop conventional skills that will be required in later stages of education for successful technical and scientific training. Simultaneously he or she is aware, from their first contact with the subject that is necessary to review, critically and well founded, the academic and policy proposals. This type of teaching emphasizes the existence of market failures affecting the environment and the distribution of income and wealth, as well as the role of government in regulating them and the benefits of the Welfare State. This teacher is sensitive to the situation of minorities and social exclusion at local and international level and seeks treatment of these topics.

c) The critical activist. This type of teacher analyzes the power relationships in the economic system and the forms of social control that provokes it. This kind of teacher finds an inspiration in neo-Marxist analysis of social reality. Anyway, frequently it could be reformulated from the perspective of the different movements in which the new left has been organized to upgrade itself in the nowadays historical context: environmentalism, feminism, multiculturalism, advocacy groups minorities, etc. Their reference in education and educational research is the sociocritique paradigm. Frequently, they use action research methodologies (McKernan, 1999), not only to explore and improve educational practices, but also trying to transform specific social contexts using these research techniques to deal with social problems and their possible solutions. The ultimate goal would be transforming the social reality in which they are acting.

Obviously these three types represent a simplification but they allow establishing three axes that define a three-dimensional space in which any reflexive teacher should be able to locate himself or herself. In addition he or she should be able to alter their pedagogical approach attributing to a greater or lesser presence to each of the approaches. This reflection should be explicit, in order to become aware of ethical and professional implications of didactic communication, given the asymmetry of power between student and teacher in the selection of content, teaching resources and materials. The ultimate goal should be that students could appropriate the knowledge and develop the skills that would be applicable throughout their life as active citizens in various contexts and in exercise of his freedom of judgment, but only after having had access to a wide range of resources.

#### **4. EQUITY, ECONOMY AND GEOGRAPHY: PROPOSAL FOR A SHARED AGENDA**

After this analysis, the logical step is to identify areas where it could be possible to configure a shared treatment of Equity, Economics and Geography and set a new agenda in the development of the economic dimension of social competences for lifelong learning. Additionally, it would allow exploring which kind of learning resources or integrated perspectives could be used. The complementarity multitude of the merely descriptive dimensions multitude of variables that show the geographic and economic reality is obviously complemented by the description of the processes leading to the distribution of resources observed and the potential for redefining. This gives meaning to a treatment set of both perspectives and the use of technological, procedural and conceptual resources shareable. Without being exhaustive, we can list the following common areas:

- a) Measurement of income distribution: GDP (income, demand and supply), Personal Income Available, Lorenz curve and Gini index. Other complex indices. Human Development Index.
- b) The distribution of wealth. Ownership patterns of the factors. Extension and accumulation. Geography and Economics of the privatization of public spaces and the natural environment.
- c) The labor market: job insecurity, long-term unemployed, women's access to employment and responsibility in organizations, wage inequality, youth unemployment, long-term unemployment.
- d) The local, regional, national and international distribution of income and expenditure. Tax collection. Investment charges and currents. Transfers and subsidies. Fiscal balances. Tax fraud.
- e) The Welfare State. Local, state, national and international distribution of education, healthcare, contributory and non-contributory pensions, unemployment helps and dependent people.
- f) International asymmetric mobility of productive factors : product, capital and skilled labor versus unskilled work.
- g) Globalization and Offshoring: workers' rights, social security systems, mechanisms for union representation, labor conditions, international redistribution of manufacturing job.
- h) Globalization and governance. Geography and Economics of political corruption. Integration processes and methods. Global presence of multinationals and relative weight in local economies.



- i) Geography and Economics of Exclusion: elderly, the sick, women, disabled, prisoners, poverty.
- j) Geography and Economy of ethnic, linguistic and sexual orientation minorities.
- k) Geography and Economics: transformative projects of social reality. Other ways to manage social integration and sharing of resources. Microcredits. Self-managing communities. Government of the commons (in the sense of Ostrom , 2011).