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Education Today
The OECD Perspective

Chapter 8

Equity and Equality of Opportunity

Analyses of developments and policies that influence equity have been an underlying priority in much of the OECD educational work. The persistent patterns of inequality have been highlighted, with the increasingly quality of international data permitting analyses relating to many pertinent groups of learners and their educational experiences. OECD analysis has shown that there need be no contradiction between equity and efficiency, and indeed has underlined how damaging to economic as well as social goals is the phenomenon of exclusion and widespread under-achievement. A major international review of equity in education, published in 2007, outlines ten broad policy directions around the design of provision, practices, and resourcing. The charting of the opportunities, outcomes and policies towards different population groups who may well be disadvantaged has been undertaken across the many sectors of education and training, including longstanding work on special educational needs.

8.1. Key findings and conclusions

There is no contradiction between equity and efficiency in education: There is a widespread argument that the redistribution of resources to those in greatest need helps equity but damages efficiency. The OECD in its analysis of equity, as well as the World Bank in a recent report, argue that equity and efficiency are in fact complementary. This is clearly the case within basic education: school failure has large costs not only to those involved, but also to society, because the welfare costs of marginalised persons are large. Reasonably-priced, effective measures to address failure benefit both efficiency and equity. Some analyses even suggest that an equitable distribution of skills across populations has a strong impact on overall economic performance.

📖 *No More Failures: Ten Steps to Equity in Education*, 2007, Chapter 1; World Bank, 2005.

The countries with high quality and high equity have embraced student heterogeneity and avoided premature and differentiated structures: Evidence from PISA (and comparison with evidence at the primary school phase from the Progress in International Reading Literacy Study [PIRLS]) and from countries which have introduced comprehensive schooling, suggests that early tracking is associated with reduced equity in outcomes and sometimes weakens results overall. In countries with early selection of students into highly differentiated education systems, differences among schools are large and the relationship between socio-economic background and student school performance stronger.

📖 *No More Failures: Ten Steps to Equity in Education*, 2007, Chapter 3.

The general upgrading of attainments and qualifications increasingly excludes those who have not shared in this advance: Many adults remain unqualified and some young people still do not successfully complete secondary education. Across the OECD nearly one in three adults (31%) has only primary or lower secondary education – a real disadvantage in terms of employment and life chances. In all OECD countries, those with weak basic qualifications are much less likely to continue learning in adult life and there are big differences between countries. That there are fewer proportionately with these very low attainment and qualification levels increases the risk of their exclusion and detachment from economic and social life.

📖 *No More Failures: Ten Steps to Equity in Education*, 2007, Chapter 2.

Choice may stimulate quality but with risks for equity: There are quality arguments to be made in favour of creating a degree of choice as a vehicle for stimulating improvement. When choices exist, schools must then look beyond their own walls at what others – their potential "competitors" – are doing; without some room for "exit" to be exercised, parents and students have no threat to back up "voice" or participation. OECD work confirms that better educated, middle-class parents are more likely to avail themselves of choice opportunities and send their children to what they perceive to be the best school, widening the gaps between the sought-after schools and the rest. Across countries, greater choice in school systems is associated with larger differences in the social composition of different schools.

📖 *No More Failures: Ten Steps to Equity in Education*, 2007, Chapter 3; *Demand-sensitive Schooling? Evidence and Issues*, 2006.

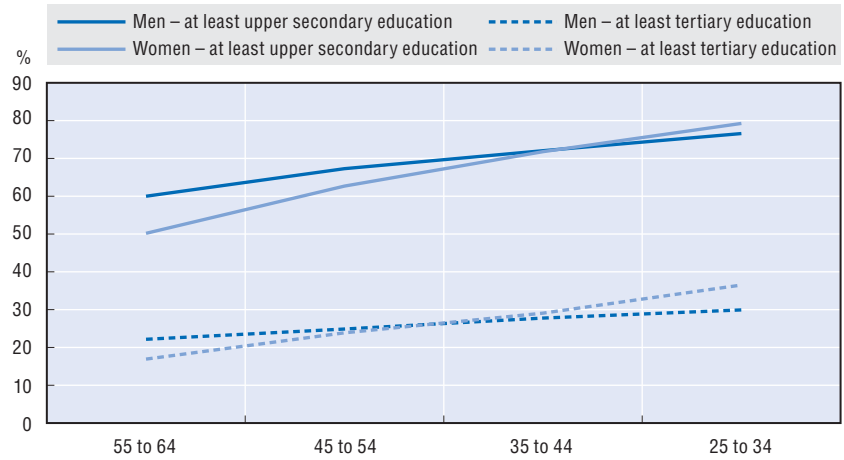
Girls and women have now moved clearly ahead of boys and men in education: The number of expected years in education between ages 15 and 29 years across OECD countries enjoyed by young women – 7 years – now surpasses those of young men who average only 6.6. It was higher in all countries in 2006 except Australia, Austria, Germany, Japan, Mexico, the Netherlands, Switzerland and (in 2005) Turkey among OECD countries. Female graduation rates from upper secondary education are higher in 22 of the 24 countries permitting the comparison – the exceptions being Switzerland and Turkey. The female advantage gap is more than 10 percentage points in Denmark, Iceland, Ireland, New Zealand, Norway, and Spain. Only in Japan, Korea, Switzerland and Turkey do the entry rates of men to tertiary education now exceed those of women.

📖 *Education at a Glance: OECD Indicators – 2008 Edition*, Chapters A and C.

Relatively small proportions of compulsory school students receive additional funding for their education due to special needs, though there are cases where this amounts to 1 in 5 students: In the countries supplying data on additional funding across the three categories of needs (disabilities, difficulties and disadvantages), a nearly 3% median of students (2.7%) receive additional outlays because they are assessed as disabled, rising to just over 5% in the United States. Additional spending on those with difficulties is in general low (2.4%) rising to 3.3% for those counted as "disadvantaged". Much higher proportions are found in some countries – such as the 17% of United Kingdom compulsory students qualifying for funding due to learning difficulties, or the 15% and over in the Netherlands, Flemish Belgium, the United States, and Mexico because of their disadvantage.

📖 *Students with Disabilities, Learning Difficulties and Disadvantages: Policies, Statistics and Indicators – 2007 Edition*, Chapter 4.

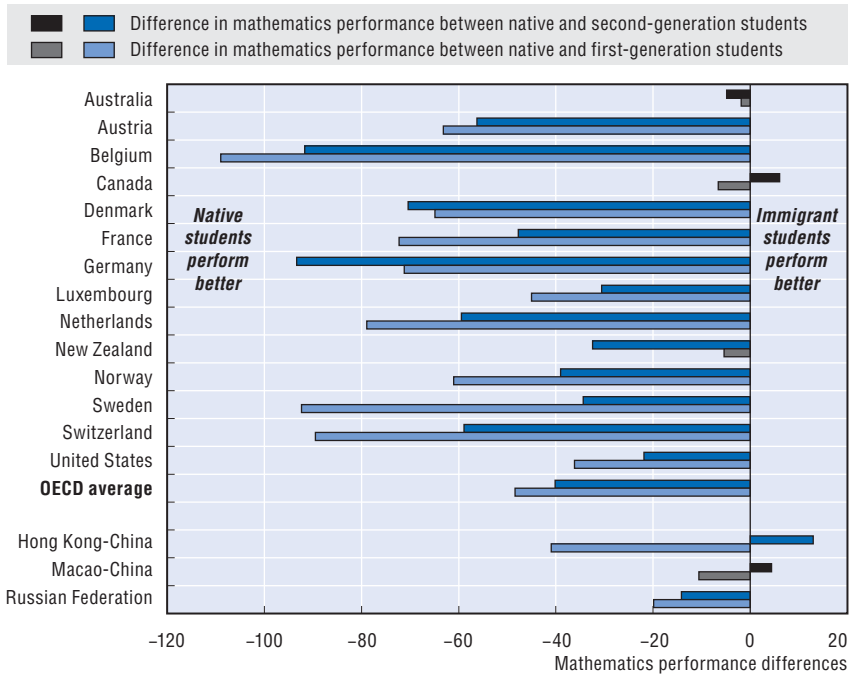
Figure 8.1. **Women have overtaken men in upper secondary and higher education attainments, as shown by attainments of different age groups in the adult population in 2006**



Source: OECD (2008), *Education at a Glance: OECD Indicators – 2008 Edition*, OECD Publishing, Paris.

StatLink http://dx.doi.org/10.1787/401474646362

Figure 8.2. **Mathematics performance by migration status in 2003**



Note: Statistically significant differences are marked in blue tones.

Source: OECD (2007), *Education at a Glance: OECD Indicators – 2007 Edition*, OECD Publishing, Paris.

StatLink http://dx.doi.org/10.1787/068061288083

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Boys with disabilities and receiving additional resources outnumber such girls by approximately 60 to 40, rising to two-thirds to one-third in their call on specific resources for learning and behavioural difficulties: These are consistent results, repeatedly found in different studies with different methodologies. There is a consistent majority of males over females in special needs education provision or in receipt of additional resources for disabilities and learning difficulties. Whether done by location (special school, special class, regular class), cross-nationally or nationally, age of student or stage of education, boys outnumber girls. For learning difficulties, the difference is even larger with males outnumbering females by two-thirds to one-third.

📖 *Students with Disabilities, Learning Difficulties and Disadvantages: Policies, Statistics and Indicators – 2007 Edition*, Chapter 4.

Immigrant students tend to perform at levels significantly lower than their native peers, though with some notable exceptions: The degree to which immigrants lag behind native students is most pronounced in Austria, Belgium, Denmark, France, Germany, the Netherlands, and Switzerland, though in some places they are at similar levels – in three traditional settlement countries Australia, Canada, and New Zealand, as well as in Macao-China. Second-generation students perform significantly better than first-generation in Canada, Luxembourg, Sweden, Switzerland, and Hong Kong-China. There is lower performance despite generally positive attitudes towards learning among immigrant students and there is not a significant association between the size of the immigrant student populations and the performance difference between immigrant and native students.

📖 *Where Immigrant Students Succeed: A Comparative Review of Performance and Engagement in PISA 2003*, 2006, Chapter 2.

In many OECD countries, tertiary education remains dominated by students from well-educated backgrounds: Evidence from the 1990s showed that young people whose parents had tertiary education themselves were between two to six times as likely to complete tertiary studies as those whose parents had only secondary level qualifications. Only a few countries have data to permit such calculations; among those that do, students with fathers who had completed higher education were more than twice as likely to be in higher education in Austria, France, Germany, Portugal and the United Kingdom. It is substantially less in Spain (1.5 as likely) and Ireland (1.1). Countries providing more equal access to higher education – such as Finland, Ireland and Spain – are also the countries with the more equal between-school performances in PISA 2000.

📖 *No More Failures: Ten Steps to Equity in Education*, 2007; *Education at a Glance: OECD Indicators – 2007 Edition*, Chapter A.

Social background strongly influences teenage expectations to go on to complete higher education, with the influence seen most powerfully in the Slovak Republic, Switzerland, and Hungary: PISA information on students' social backgrounds allows their categorisation into "high" and "low" socio-economic status and the comparison between them regarding their expectations to complete higher education. In all countries, there is a clear relationship between expectations to get an advanced education and social background, with the odds mainly in the range 2.0 to 2.9. The odds are lowest – expectations least shaped by background – in Finland (1.8). They are over 2.9 in Austria (3.0), Belgium (3.0), Greece (3.0), the Slovak Republic (3.1), and Switzerland (3.1), rising to 4.0 in Hungary.

📖 *Education at a Glance: OECD Indicators – 2007 Edition*, Chapter A.

Countries share the fact of large inequalities in access to adult learning: The disadvantaged groups regarding adult learning are mainly the low-educated, older individuals and those working in small- and medium-sized enterprises. There are no common trends relating to employment status. While the employed have higher participation rates in half the countries supplying evidence, the unemployed have higher participation in four, and those out of the labour force in another four.

📖 *Promoting Adult Learning*, 2005, Chapter 1.

8.2. Orientations for policy

The OECD advances ten steps – major policy recommendations which would reduce school failure and dropout, make society fairer and avoid the large social costs of marginalised adults with few basic skills. These concern **design** (points 1-4), **practices** (5-7), and **resourcing** (8-10):

1. **Limit early tracking and streaming and postpone academic selection:** The OECD suggests careful review of early differentiation into schools of different types in those education systems that practise it and holds strong reservations about introducing it in those education systems that do not. The early tracking and streaming of school students need to be justified in terms of proven benefits given that it so often poses a risk to equity. Systems that use early tracking should consider raising the age when it first takes place and academic selection needs to be used with caution.
2. **Manage school choice so as to contain the risks to equity:** The exercise of choice poses risks to equity and requires careful management to ensure that it does not increase the differences in social composition of different schools. When there is the exercise of parental choice, the oversubscribed schools need to find ways to even out the social mix – such as through lottery systems as selection methods – and financial premiums to schools with disadvantaged students may also help.

3. **In upper secondary education, provide attractive alternatives, remove dead ends and prevent dropout:** Early prevention of dropout is the best cure and monitoring those at risk should be linked to interventions to improve outcomes and prevent dropout. Basic schooling should support those who are struggling rather than focus primarily on those who excel. Upper secondary education should be attractive, offering good quality pathways with effective links to the world of work. Special programmes to smooth the transitions at the end of basic schooling can help encourage students to stay in school. Good quality vocational tracks are essential: removing an academic hurdle from entrance to general upper secondary education, as Norway and Sweden have done, can serve to increase the status of vocational tracks.
4. **Offer second chances to gain from education:** Second chances are necessary for those who lack basic education and skills. These include programmes that provide literacy training, primary and secondary education, work-based programmes and arrangements to recognise informal learning. Across OECD countries, many adults and young dropouts without basic education obtain school qualifications through second chance programmes. In the United States, almost 60% of dropouts eventually earn a high school credential (GED certificate).
5. **Provide systematic help to those who fall behind in school and reduce high rates of school-year repetition:** The high repetition rates in some countries should be reduced. They should change incentives to schools so that they do not so readily use repetition and instead develop alternatives for those who are struggling. One way is through greater interventions in classrooms which have proved to be effective in addressing learning needs of weaker students, like the Finnish approach of offering a sequence of intensifying interventions for those with difficulties to draw them back into the mainstream. Teachers need a highly-developed professional repertoire aimed at supporting those who are falling behind.
6. **Strengthen the links between school and home especially for disadvantaged families:** Parental involvement – working with children at home and actively participating in school activities – improves results. Disadvantaged parents tend to be among the least involved: schools need to target their efforts to improve communication with the most disadvantaged parents and help develop environments conducive to learning in homes. After-school homework clubs offer one way to support those with weak home support.
7. **Respond to diversity and provide for the successful inclusion of migrants and minorities within mainstream education:** Incentives to encourage immigrants into early childhood education are important. Particular attention needs to be given to language learning at all levels, including through teacher professional development – for this and for all other aspects of teaching in

multicultural environments. At the same time, segregation must be avoided including the tendency for too many immigrant children to end up in special education institutions.

8. **Provide strong education for all, giving priority to early childhood provision and basic schooling:** Where fees are involved in early childhood education, they should be moderate and remitted for those too poor to pay. Countries which charge fees for early childhood but not tertiary education need to re-examine their policies on equity grounds. A strong focus is needed in basic education on those with learning difficulties, and the implicit incentive for some to drop out provided by linking grants to families with school performance means that this practice should be reviewed on equity grounds.
9. **Direct resources to the students with the greatest needs, so that poorer communities enjoy at least the same level of provision as others better-off, and to support schools in difficulty:** Countries need adequate mechanisms to redistribute resources and minimise regional inequities in provision with the aim of reaching acceptable minimum standards everywhere. Additional resources need to be channelled through schools to help disadvantaged students while the stigma of labelling particular schools as "for disadvantaged students" should be avoided.
10. **Set concrete targets for more equity, particularly related to low school attainment and dropouts:** Numerical targets are a useful policy lever through articulating clearly what is to be achieved rather than simply the means to improvement. Countries can usefully adopt a small number of numerical targets, particularly for reducing the numbers of school-leavers with poor basic skills and of early school dropouts. Policy needs also to manage and respond to the public debate which follows publication of school-level test results, so that it does not exacerbate the equity problems themselves, and it should give energetic support to those schools with weak results.

📖 *No More Failures: Ten Steps to Equity in Education*, 2007, Summary and Policy Recommendations.

Equity for students with special needs requires sustainable inclusive education policies, with a resource-based approach to satisfy individuals' needs: A resource-based approach to special needs helps to quantify how needs are being met, but the additional resources should be used efficiently and effectively in enhancing inclusion in school settings and access to the labour market. Equity in access for students with disabilities, difficulties and disadvantages depends on effective co-ordination between welfare, health and education services and with the private and independent sectors. Inclusive education requires all those who work in educational settings to have some understanding of special needs issues and of the ways in which other non-teaching professionals work. Sustainability of inclusion policies is

limited because the training of teachers, academics and other professionals to work in such situations is under-developed.

📖 *Students with Disabilities, Learning Difficulties and Disadvantages: Statistics and Indicators*, 2005.

Policy actions to improve the situation of the Young Adults with Low Levels of Education (YALLE) group need more precise targeting criteria than age or qualification level: The YALLE group is heterogeneous. The disadvantages often experienced by immigrant populations call for specific programmes, with young women facing particular challenges in connection with their family conditions and specific national family or employment policies. Programmes for re-qualification should be sensitive to specific structures of national labour markets, including at the local level, and the demand for different occupations and qualifications.

📖 *From Education to Work: A Difficult Transition for Young Adults with Low Levels of Education*, 2005, Chapter 6.

Understanding effective approaches for teaching, assessment and learning are just as much a priority for adults needing language, literacy and numeracy skills (LLN) as for school and tertiary students: The LLN sector has traditionally been set apart from the mainstream and consequently been relatively neglected. Among the priorities for addressing the learning needs of adults with low foundation skills are:

- **Strengthen professionalism:** Countries need to continue in the current direction of strengthening practice through more rigorous qualification and professional development requirements.
- **Balance structure and flexibility:** Formative assessment is a very helpful organising framework to do this.
- **Strengthen learner-centred approaches:** Many aspects of adult LLN provision are still more oriented to the needs of systems rather than learners.
- **Diversify approaches to assessment and programme evaluation for accountability:** Systems which use diverse, well-aligned measures of learning processes as well as outcomes will be better able to manage competing goals and interests – and to capture useful data.
- **Strengthen the knowledge base:** Researchers in the field will need to broaden the range of methodologies used and in particular to pay much greater attention to impact.

📖 *Teaching, L.earning and Assessment for Adults: Improving Foundation Skills*, 2008, Chapter 11.

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