Equity and Education

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Abstract

Equity and education are long-standing goals of many societies and there are diverse perspectives on ways to provide equal opportunities and resources for all. The literature reviewed reveals wide differences in educational outcomes both within and between countries and suggests that education policy and institutions on their own cannot solve structured inequalities. It is also argued that in a time of economic liberalization equity in education in many countries is more difficult to attain and that inequalities can be deepened. Research indicates that social mobility is more difficult to achieve for students from lower income households who continue to receive poor quality education and therefore social hierarchies and opportunity structures remain intact. The literature suggests that public policy can make a difference and cites Korea, Malaysia, and China as examples of countries, which have performed strongly in international tests. Researchers argue that what is required is collaboration between all involved to fulfill the promises that education can empower all citizens to participate in a globalized world.

Introduction

Equity is usually defined as fairness, impartiality, and justice and is related to equal opportunity (Sen, 2009). The world’s progress toward these goals is usually measured by comparisons across countries and involves many disciplines. A review of the literature suggests that in many contexts equity inspired goals are not always realized and where they have been attained political and economic changes can reverse equity gains. The key reasons cited for not achieving equity are that not everyone has equal resources and structural poverty excludes those who are poor or cultural and religious practices are discriminatory against gender, age, diversity, or disability.

Education is seen as having positive effects on society by providing skills and promoting social stability, inclusion, and in creating modern democracies (Stromquist, 2005). It is also signaled as a major factor, which would make an impact on reaching equity goals and decreasing poverty.

Equity in education is usually linked to equal access to formal education opportunities and resources. The idea often assumes economic growth and social transformation. Equality of opportunity is generally considered to maximize the total social good, increases social gains, and can lead to diffusion of power to individuals. Education is seen as determining opportunity of outcomes, livelihood, and economic growth. The lack of education is often perceived as the most pervasive cause of inequality and underdevelopment. The immense technological changes that are synonymous with globalization have compressed time and space with the use of the Internet and electronic media. Alongside these are innovations in education technology which have given rise to new measures of equity and inequalities in education such as technological access and the digital divide. The new technologies have also renewed a focus on the significance of lifelong learning (LL) for adults.

Others argue that there are also prejudices against those who are not considered intelligent and this leads to variability so everyone does not receive the same education. In a similar vein, analysts and theoreticians conclude that the quality of education varies for different income levels with those at the lower end receiving an inferior education and thereby the levels of inequality remain static or increase unevenly.

The Gini coefficient a common measurement of income inequality within countries captures the ratio between the most and least wealthy in a country with zero equating to zero inequality and one indicates complete inequity. This gap between rich and poor has increased in most countries in spite of more spending on education. A comparison of the Gini coefficient between countries show a wide range with one of the most equal countries such as Denmark scoring 0.248 and one of the most unequal South Africa scoring 0.65 http://data.worldbank.org/indicator/SL.POV.GINI. The implications for equity in education is that those with less income are less likely to receive a good quality education or be able to access tertiary education to enable them to find better employment opportunities.

Similarly, the human development index which measures longevity, health, and knowledge track a higher score for the North than the South. The human poverty index which measures life expectancy, adult literacy, water quality, and underweight children confirms the above data and indicates that Central Africa is the worst off region, while Japan has the best score www.wacra.org/world%20Poverty%20MAPPDF. This has led social theorists to conclude that education is but one force among many to distribute resources (Stromquist, 2005).

Education has evolved from the pursuit to attain knowledge for itself to include to lead, train, and nourish, as well as to see the improvement of societies and nation-states. On an individual level the outcomes are measured by the attainment of knowledge, skills, and an understanding of what is learned and an increase in cognition. The learner’s identity and character may undergo change and the learner may become more socially responsive and also be desirable that the learner’s ambitions are expanded and curiosity sparked and he or she aspires to seek and to create more knowledge, to be critical, for personal or economic advancement or pleasure, for social purposes, justice, and to excel in educational pursuits.
On a societal and country level the outcomes are measured by comparisons done by international agencies, such as the World Bank, The Organisation for Economic Cooperation and Development (OECD) by using the Programme for International Student Assessment (PISA) and the International Association for the Evaluation of Educational Achievement. Some of the measurements used to determine the quality, effectiveness, and impact of education are, the improvement in the quality of life and longevity, adult literacy, knowledge held in a society, returns on education, numbers, and progress of girls in education, how well students are prepared for life and the global economy, the income gap, as well as social and political stability http://www.OECD-ilibrary.org/education/education-indicators-in-focus_22267077.

Education in a formal sense means an institutionalized system wherein one enters a program of learning which is certified. It includes preprimary, primary, secondary, and tertiary pursuits which involved academic or vocational knowledge and skills and is strongly linked to employment opportunities, social mobility, and transformation.

The state is the main provider of education at a primary and secondary school levels and in most countries subsidizes tertiary education. However, in a rapidly changing global context and with the financial instability since 2008, many governments have cut spending on higher education. In response, there has been a growth in distance education and privatized education provided by business and independent education institutions. Distance education provided by universities is a means to secure funds and to reach a global audience. These measures have meant that education for profit has gained in ascendancy in some countries and threaten to reinforce social hierarchies and opportunity structures.

Another economic factor, which has impacted on equity and education in the early twenty-first century is a downturn in the global economy. This has led to high rates of youth unemployment which subsequently impacts on access and success in education with implications for economic growth and social and political stability (Scarpetta et al., 2010). Researchers point to other challenges in achieving equity in education linked to technology and new forms of social media which have resulted in changes in the global culture especially among youth. These new methods of communication bring to the fore the need for new and complex understandings in dealing with tensions between local and global cultures that defy attempts at homogenization within and across education systems.

There is a radical viewpoint (Morley, 2012; Thompson, 2000) which suggests that education does not necessarily increase social mobility but can reproduce inequalities by providing opportunities and resources for those already established in the society. Breault and Lack (2009) argue that factors such as the family capital (incomes and educational level of parents) represent an essential barrier of educational possibilities of graduates of public high schools and also that there is a considerable inequality even of educational intentions for lower income pupils as issues of equity in these schools are steeped in deficit notions of fixing the problem. They further argue that children from families with higher social positions receive full secondary education and then go on to study in universities, while children from families with low family capital are limited by the general secondary education and then study in technical colleges. These views are supported by empirical research conducted by UNESCO and the OCED (2010) PISA study done in 2009 shows that many 15-year-olds who performed poorly in PISA tests are from socioeconomically disadvantaged backgrounds and that poor home backgrounds reinforce low-quality performances.

Nonformal and informal education or learning usually means noncredit learning, which takes place outside of formal institutions and can occur in the everyday. This kind of education is usually led by nongovernmental or civil society organizations, trade unions or occurs in social movement activities. Internships, apprenticeships, or on-the-job training are other forms of nonformal learning and can play a role toward accreditation. In many parts of the world like in India, or in some parts of Africa many people learn in the informal system as they do not have the resources or cultural practices forbid girls to attend school (Rogers, 1992, 2005).

Nonformal programs offering literacy programs have experienced uneven successes. The successes in Cuba and in the previously socialist and communist countries have not been replicated in most of the developing countries (OECD – World Inequality Database on Education). Women and youth in rural areas in developing countries still constitute the bulk of the target group for nonformal education (Rogers, 1992, 2005).

The impact of nonformal education is not easily measured and learning in social movements is usually measured by social change, how power is redistributed, and the growth of democracy (Rogers, 2005). These are significant measures of equality in new democracies such as in South Africa which gained a new democratic government in 1994 and in Tunisia and Egypt where, in 2012, social movements unseated the ruling powers. This phenomenon is now widely known as the Arab Spring. Govender and Chhina Rao (2012) point out that the victories in these countries over the past few years may not necessarily have replaced unequal relations or changed societies fundamentally.

Interventions to Achieve Equity in Education

The most significant intervention to achieve equity through education on a global scale has been to provide free and compulsory primary and secondary schooling for children or what is often referred to as basic education. The provision of basic education on a mass scale is seen as a significant factor in increasing people’s life chances. A quote from UNESCO’s International Education statistics of the global population of primary school age states that at present 655 million children are in school and 61 million of children are out of school. UNESCO estimates that this number has declined but of this half is in Africa (www.unesco-MDG.org).

According to UNESCO progress to reach the Millennium Development Goals (MDG) and the goals set by the Education for All movement, one of which is to have universal education for all by 2015 is hampered by the continuing wars in Africa, ethnic prejudices, migration, HIV/AIDS, and tuberculosis, as well as malaria. Other factors that contribute to not reaching the MDGs are that in some communities in particular in rural areas girls are often excluded from formal secular schooling in
spite of great efforts being made by governments and women’s movements to bring awareness of the importance of schooling and also to offer single sex schooling. The increase in the statistics for girls in schools in urban areas can be attributed to modernization which has meant an increase in urbanization and therefore the necessity to be independent and education is seen as one means to achieve self-sufficiency (www.World-Inequality-Database-on-Education). The increase of rural education is another feature of a country’s path to development and in some countries, for example, in China it is hoped that improved rural education will slow down the rural population’s movement to the city. In a study to measure the quality of rural schooling in Malaysia conducted by Othman and Muijis (2012) they found that generally teachers perceived no differences between urban and rural schools in educational quality.

There has also been an increase in religious schools attributed to religious fundamentalism and an increase in home schooling as parents become disaffected and prejudiced against multiculturalism, and the academic standards of public schooling.

Another feature of globalization has been the continuous migrations of populations all over the world, as well as an increase in the number of economic and political refugees. An OCED study of 2006 concludes that 175 million people live outside their home country and in OCED countries there has been an increase of 5% in the immigrant population between 2000 and 2009. New forms of discrimination against immigrant populations or economic or political refugees are on the increase as these populations are excluded from participating in everyday activities in the host country. In some countries, where there is high unemployment migrant populations often become targets of abuse. Governments, which abide by the United Nations Refugee policies, have allowed migrants and refugees access to education as it is acknowledged by them as a basic human right. This policy is also seen as contributing to political stability; it allows for the attainment of citizenship, for refugees to make a positive contribution to social cohesion, and contributes to human development. There is very little research to monitor progress in this area and no proven statistics to indicate that these attributes have been achieved. The 2009 PISA study indicated that immigrant populations are a significant community in schools who may not receive an equitable education. The PISA study showed that generally immigrant populations underperform in school. Some of the factors identified to explain underperformance are language barriers, poor learning opportunities, and public policies that do not take into account the diversity of immigrant populations (OECD, 2010-PISA study 2009).

Another significant intervention has been to provide access to excluded groups of people by participation to be inclusive of gender, religion, age, race, indigenous groups, or marginalized groups. Access into higher education of new constituencies is seen as a new form of democratization because it widens participation and is a form of social justice and contributes to economic development and social harmony (Thomas and Tight, 2011; Thompson, 2000).

Alternative admissions policies known as Recognition of Prior Learning (RPL) or Assessment of Prior Education and Learning (APEL) for mature adults were much publicized in the 1990s in higher education. These policies are associated with LL and redress and allow for alternative access for mature adults who do not have the required formal qualifications to use prior learning to gain access to an education program or to gain credit toward certification (Thomas and Tight, 2011; Thompson, 2000).

Widening access has not always meant that previously excluded groups have progressed seamlessly or have successfully completed their education, or excelled in their educational attainments. This has led to much research in the field of how to assist excluded groups from remaining in the education system and also to excel, as well as to allow them to become part of an academic community as staff and students (Thomas and Tight, 2011; Thompson, 2000).

A number of recommendations from the research have led to various reforms in education some of which are to create inclusive admissions policies and practices while making education provision available at convenient times and places for working adults. Opening up access to poor students has required financial assistance and scholarships, as well as measures to support academic development and in some cases the duration of the academic program has been extended. These reforms have to confront critiques of lowering academic standards in particular where admission requirements are lowered. The emphasis in most elite universities is on creating a meritocracy and maintaining an elite group (Featherman et al., 2010; Thomas and Tight, 2011).

In developing countries which have entered the global economy and have suffered racial oppression, colonialism, and imperialism like South Africa, India, and Brazil, and lag behind in professional skills there have been huge investments in education in particular in higher education. There have been concerted attempts to produce a skilled and professional work force. The interventions in these countries to end the inequalities have been to enhance schooling opportunities, which include more liberal admissions criteria, and a financial aid scheme financed by universities and the governments or a loan system to enter both public and private institutions (Akoojee and Nkomo, 2011; Featherman et al., 2010; Motala, 2001).

However, many students in higher education are academically underprepared because of an uneven schooling system therefore they are encouraged to attend extended degree programs. Because of the low numbers of skilled black people or professionals in South Africa in this population category there are various forms of affirmative action such as setting targets or quotas for certain programs such as medicine or careers such as engineering as these are disciplines and careers which were not offered to Black African students in apartheid South Africa (Featherman et al., 2010).

In Brazil, private higher education absorbs 70% because the public system is viewed as inefficient. This means that those who cannot afford the fees in private institution receive a low-quality education. In India, the impediments to access are poverty, the caste system, and gender discrimination impeded access to education. India has seen an increase in higher education and is now the second largest higher education sector in the world. The Indian state subsidizes higher education by almost 90% of costs and this has led to a huge expansion in higher education. However, state education is not always of same quality as in private institutions therefore there
has been a call for meaningful education for all (Akoojee and Nkomo, 2011).

Measures worldwide for schooling in certain countries have focused on improving equity by improving the quality of teaching which includes teacher training, encouraging progressive teaching methods rather than more didactic models that emphasize technical rationality. Other interventions for teachers have ranged from incentives in particular for rural teachers, apprenticeships, learning partnerships, workshops, in-house training, and professional courses. Alongside these innovations are calls for varied forms of assessment strategies such as including oral and written forms of assessments and to scaffold assessments, as well as to allow for cumulative and formative assessment models. Further measures to improve education performance and learning opportunities have ranged from increased physical resources, such as providing basic infrastructure for water and electricity, classroom facilities, improved instructional materials, calls for greater parent and community involvement, and incentives for teachers and principals (Othman and Muijs, 2012).

There is also a need for tutor assistance. In particular to adult students who often have to balance conflicting demands of work, family, and studies and may need more personal attention. Critical education theorists argue that a transformation in demography and different access routes such as RPL and APEL also require curriculum and pedagogy changes, as well as reforms in institutional structures and governance. They support the call for a critical pedagogy which supports social and institutional change as a means to improve equity (Thomson and Tight, 2011).

Widening access through use of technology commonly known as e-learning is also changing the way that teaching is practiced, how research is produced, and how knowledge is shared among teachers and learners and with the public. The uses of education technologies are changing pedagogic relationships and influence new theories of teaching and learning. Some argue that e-learning shifts more responsibility onto the learner however most are in favor and conclude that open access to resources via the Internet has empowered many people who otherwise would not be able to access knowledge. E-learning has increased social aspirations to an extent whereby societal expectations need to be taken into account in what is researched and how the knowledge is shared.

Other debates on this issue are that education should have a social justice approach and that such an approach should rely on dialectical, inquiry based, and interpretive strategies, which value critical reflection. Some social justice approaches argue that education should see the social engagement of universities and schools in community and social projects. Parents and communities should participate in governance, in curriculum, and pedagogy so that marginalized communities can be more empowered and express their own agency.

There are policy makers, educationist, and communities who wish to see changes in leadership and management and argue that democratic governance requires greater accountability and transparency from the leadership, as well as democratization of knowledge. There are also countercalls for education to be linked to social entrepreneurship in particular where there is a limited possibility of employment in the formal economy and more reliance on the informal economy (Breault and Lack, 2009).

However, research has shown that most of the interventions have limited impact and the success of these reforms is uneven. Even though education has progressed for many there are persistent exclusions based on a clear intersection of gender, class, race, and other forms of disadvantage. Therefore, theorists from multiple disciplines argue that education cannot overcome deep-rooted structural inequities and more serious attention needs to be paid to build a social movement that combine critical voices of the university, school leaders and staff, students, and the community to create a vision of the education that is a dynamic environment which includes love, energy, and determination to social justice and the attainment of equity (adapted from Breault and Lack, 2009: 165).

**Measurements of Equity in Education**

Education is viewed as a strong determinant of career, life chances, employment opportunities, life expectancy, and can contribute to social change and national development. However, employment opportunities are affected by labor market conditions and the dictates of demand and supply. Governments and industry are calling for a stronger link between education and the labor market and demands of the economy. But there is not sufficient evidence to prove that markets can determine education needs or the other way around.

OCR's equity indicators (i.e., schooling, earning, and employment) for the OECD countries measure how the global crisis has affected employment. These indicators illustrated that schooling and an upper secondary qualification is the norm in most societies for participation in the labor market and for entry and success at tertiary level, as well as integration into society and to participate in a globalized economy. OECD figures indicate that during the financial crisis people with a higher education qualification were more likely to be employed and have higher earnings compared to less educated people.

However, figures from 2004 to 2008 show some contradictions and indicate that during the economic crisis an upper secondary qualification among 20–24-year olds was no longer a guarantee to providing employment or decreasing poverty. In 2011, youth unemployment in the age range 15–24 years in the United Kingdom was at 21.9%. In OECD countries, youth unemployment was more than double the unemployment rate in the general population (17%) with an increase in Spain of 51%, Switzerland 7%, and in SA the figure was 52.5%


Other forms of measurements dominated human capital theory or social efficiency are concerned with returns on investment. These approaches measure the relationship between inputs and outputs, the number of graduates in terms of the investment made, whether education achieves positive outcomes in the labor market, and a social efficiency perspective which argues that public expenditure on education must yield results anything less is wasteful expenditure. Educationists who favor an equity perspective oppose this view and argue that this discourse has led to tensions between equity and
efficiency with profound social consequences as poor performing schools face closure.

Stromquist (2005) and Othman andMuijs (2012) have argued for more qualitative studies which are attentive to history and culture to measure equity and efficiency with a concern for redistribution of educational opportunity and to improve the learning experiences of pupils. In their (Othman and Muijs, 2012) study in Malaysia to measure perceived differences in rural and urban schools they focused on processes rather than products and looked at the influence of education resources, school climate, parent involvement, and leadership (Othman and Muijs, 2012).

Equity Scorecards were used in a study in Ghana and Tanzania to measure responses to the MDG which is set to halve poverty by 2015 (Morley, 2012). The scorecards measured who was admitted, who gained access to which course of study, retention, completion, and levels of achievement. The data revealed that many poor students both men and women benefitted from widening participation policies but that academic choices are gendered and classed as both poorer and women students were underrepresented in Science and Technology programs and this suggests reproduction rather than transformation of social structures (Morley, 2012: 359). Similar results from Northern countries such as Australia where indigenous people have entered higher education from the 1970s also attributed low success rates to indigenous people having to fit into culture that is alien and one that does not empower marginalized cultures.

Further measures besides completion rates which ensure that there is accountability for public funds and investment in education is measured by the effectiveness of teaching and learning in education at a national level. Other measures are the number of students who successfully complete formal education and have the required graduate attributes which are often defined as changes in student lives and understanding of the world. Qualities which make them better and more responsible citizens, or better human beings, or social responsiveness and measures of redress are also measures of equity in education. Recently, the World Bank has also reported on the effects of corruption in government on achieving equity goals.

Some critical discourses argue that in a knowledge economy policy makers need to assert social values and work against pervasive politics of individualism and institutional competition in publication and research. They argue for more internal and international collaboration between researchers based on solidarities rather than contracts or rankings. They also favor publishing on the Internet in open access networks so as to make knowledge available to a wider audience and readership. In addition that publishing open source material should not be subject to copyright but publications be made available for public education and to encourage wider debate and discussion as this can stimulate common interests, solutions to issues and problems (Thompson, 2000: 182–183).

Conclusion

The notion of equity in education is important and has moved people in the past and will continue to move people in the future (Adaptation of Sen’s use of social justice 2009: 402). Education policies, interventions, and measurements point to a range of ideological positions which implies that the discussions are not neutral. However, there is substantial agreement among different positions that poverty structures access into education, success, and future mobility. Therefore, it is argued that what is required is the redistribution of resources as education on its own cannot deliver equality or erase all the inequities and cannot deal with all the social problems. The research indicates that the achievements are uneven and that social structures are reproduced, that the influences of global capitalism impacts on countries and people differently across the world and has sometimes deepened inequities.

The task to achieve equity through education is multilayered and will require the cooperation of governments, multinationals, social movements, academics, researchers, policy makers, and world institutions to seek innovative ways to achieve good quality education for all at the different levels of education so as to achieve the MDG for 2015. The alliances should also agree to shape a world responsive to social justice and solidarity (Stromquist, 2005; Govender and Chinna Rao, 2012).

See also: Affordable Private Schools in Developing Countries; Educational Effectiveness, The Field of; Educational Philosophy; Educational Sociology; School Choice; School Effectiveness Research; Socialization and Education: Theoretical Perspectives.

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Relevant Websites


