

34 BRIEFING PAPER



Inequalities in education from a global perspective.

**Theoretical approaches, dimensions
and policy discussions**

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Abstract

Attention to the issue of inequalities in education has risen considerably after the COVID-19 pandemic. Research points to school dropout rates and learning losses that have risen disproportionately among weak socio-economic groups. While patterns are similar in most countries, the rise in educational inequalities and its socio-economic consequences are markedly wider in the Global South than in the Global North. Educational disparities in a North-South-dimension, however, predate the pandemic. Their roots go back to the colonial past and they are still firmly embedded in the global asymmetric division of labour, power and wealth.

This Briefing Paper assesses the current international debate on inequality in education focussing on a North-South perspective. We will first briefly reflect on terminology before discussing theoretical approaches. Then, we will provide an overview of the current status quo of global disparities in education. Finally, we will analyse the international policy discussion.

Keywords: education, inequalities, global disparities

1. Introduction

The COVID-19 pandemic has brought the issue of inequalities in education to the forefront of public and academic debates. This is not surprising since educational inequalities have risen markedly in all countries of the world as an effect of the pandemic. Patterns are similar in most countries pointing to much higher burdens to cope with school closures for persons with a weak socio-economic background. As a result, school dropout rates and learning losses have risen disproportionately among these socio-economic groups. However, the rise in educational inequalities as well as its socio-economic consequences are markedly wider in the Global South than in the Global North. There is a consensus in international research and policy debates that the effects of the COVID-19 pandemic have caused an enormous set-back in international educational progress making the attainment of the Agenda 2030 and its Sustainable Development Goals (SDGs) highly unlikely (UNESCO et al. 2021). Educational disparities in a North-South-dimension, however, predate the pandemic. Their roots go back to the colonial past and they are still firmly embedded in the global asymmetric division of labour, power and wealth.

This Briefing Paper assesses the current international debate on inequity and inequality in education focussing on an often-neglected North-South perspective. To this end, we will first briefly reflect on definitions and terminology before discussing theoretical approaches to educational inequity stemming from sociology, educational sciences, and globalization studies. Then, we will provide an overview of the current status quo of global disparities in education, including recent effects of the COVID-19 pandemic. Further, we will analyse the international policy discussion. Conclusions will sum up.

2. Definitions and terminology

In the academic and policy discussion, the terms equality/inequality as well as equity/inequity are both established, with some authors using them interchangeably while some explicitly call attention to a difference between the two.

In line with the SDG 4 target of “equitable” education, recent publications by the UNESCO mostly employ “equity” when referring to the goals that are to be achieved, but also use “inequality”, primarily when talking about existing inequalities (UNESCO 2021a, 2021b, 2020, 2015a). UNESCO’s Global Education Monitoring Report 2020 defines “equality” as a state of affairs and a “result that can be observed in inputs, outputs or outcomes”, while “equity denotes a process in terms of the actions aimed at ensuring equality” (UNESCO 2020: 11). Others have defined (educational) equality as treating people as equal and thus providing the same resources to everybody, while equity, for them, means aiming at fair or just outcomes by giving more to those most in need and eliminating the unfair conditions of certain population groups (Schmelkes 2021; Stewart 2013).

Holsinger and Jacob (2008: 4) define “equality” as “the state of being equal in terms of quantity, rank, status, value or degree”, while equity “considers the social justice ramifications of education in relation to the fairness, justness and impartiality of its distribution at all levels or educational sub-sectors”. Equity thus indicates that a *distribution* is fair or justified. Consequently, there is a normative judgement of a distribution attached to the term ‘equity’.

However, the academic and policy literature rarely draws a neat line of distinction between the two concepts. For instance, Bonal’s explanation (2016: 108) that “education inequalities widen the distance with regard to the educational levels achieved by different social groups; usually they make the poor poorer and increase the necessary investments (in material,

human, and cultural resources) to facilitate children's real learning at school" refers to both quantifiable disparities as well as their impact in terms of social justice.

Neither is there much academic discussion on how the concepts of educational inequality and inequity relate to one another. Indeed, do shrinking inequalities in education automatically lead to less inequity? Would hypothetical equality in access to and outcomes of education generate complete educational equity? These questions are difficult to answer since they touch upon the complex relation between inequalities and social justice, a fiercely debated yet unresolved issue in social science. In fact, the meaning of social justice is highly context-dependent. It might, therefore, appear elusive to seek a universal definition of both social justice and educational equity, especially in a global dimension, given the heavy weight of colonial and post-colonial relations resulting in a multitude of intersectional asymmetries. A more constructive way of dealing with this dilemma, at least for the purposes of this paper, might be to operate with an approximate approach understanding social justice and educational equity as existing to a matter of degree rather than in binary terms. Such an approach would suggest to focus attention on ways of reducing educational inequalities and how these translate in terms of social stratification, rather than aspiring to an elusive objective of fully achievable educational equity.

3. Theoretical approaches

Historically important theories, which no longer hold scientific relevance for the field of education, include the use of supposed biological/genetic differences to explain varying educational results between distinct social classes (Gehrmann 2019: 32-33). Currently, a wide range of scientific disciplines and approaches discusses both inequalities and inequities in education comprising economics, sociology, political science and pedagogy. For the purposes of this paper, it is useful to distinguish between theoretical approaches framed by optimistic and those framed by critical and relational understandings of social phenomena. In a development perspective, the first category tends to optimistically view education as an instrument for overcoming poverty and facilitating human well-being. By contrast, the second approach emphasizes the mutual interdependency of education with other social conditions.

3.1. Human capital and rational choice theories

The first direction is manifest in human capital theory, originally formulated by Theodore Schultz (1961) and Gary Becker (1964). It constitutes up to today the main theoretical foundation of World Bank policy in the education sector, and, due to the influence of the World Bank, in much of bi- and multilateral development cooperation (cfr. Bonal 2016; Langthaler 2015b). Human capital theory rests on the assumption that investments in education will have positive impacts on human skills, which will in turn generate economic returns at the individual as well as the societal level. Consequently, education is seen as a key instrument for the eradication of poverty and for economic growth, and hence for development (Bonal 2016: 97-98). Thus, human capital theory postulates a linear causal relationship between education and development (Langthaler 2015b: 33-34). In applying a functionalist perspective, it considers education primarily as an economic factor. By contrast, the role of economic and social structures in creating inequalities (and inequities) is neglected (Miethe et al. 2021: 113-116). Likewise, human capital theory overlooks how strongly education systems can function to reproduce social stratification (Bonal 2007).

Human capital theory relies on ideas of instrumental rationality as well as rational choice and action to explain individual educational trajectories. People are thought to be encouraged to

make investments in education based on calculations about how better education will lead to better salaries. Thus, they are assumed to maximize utility in the form of educational investments while other factors that shape the educational demand and educational decisions of people are disregarded (Bonal 2016: 102-104). Other variants of rational choice theory acknowledge that utility calculations and educational decisions significantly depend on the social origin of people, but they remain within the overall framework of educational trajectories as a result of rational decisions (Gehrmann 2019: 43ff).

3.2. Relational approaches to educational inequalities

In contrast to the functionalist perspective on education of human capital and rational choice theories, other approaches have a relational understanding of education, emphasizing the reciprocal and contextually contingent influences between education and other social conditions (Langthaler 2015: 34). Education is seen as being significantly shaped by sociocultural, economic and political circumstances and – being deeply intertwined with other social problems – as not providing a simple, straight-forward solution to questions of development. In this view, education does not automatically promote equity, but rather has the potential to subtly reproduce social inequalities. Among the varied scholarship in this direction, often based on Marxist and/or post-/decolonial approaches, rank, for example, critical pedagogy, critical educational science, and critical sociology (Altbach/Kelly 1978; Carnoy/Samoff 1990; Hickling-Hudson 1998).

Although later on critiqued as excessively structuralist, Bourdieu's and Passeron's work from the 1960s on the reproduction of social stratification and power relations through the education system is still very influential (Bourdieu/Passeron 1970, 1964). It exposes that equal opportunity in schools, assuming meritocratic hierarchies as solely based on individual performance, is little more than an illusion. Bourdieu and Passeron argue that in reality the chances for educational success of a child depend far more on their social origin than on their individual talents, and the education system with its "equal treatment" reproduces the social class of the learners and thus guarantees the continuity of inequality (Erler 2007: 39-41).

A key concept in Bourdieu's and Passeron's approach is the term of (class) habitus, designating the ensemble of attitudes, views, habits, and practices that a person has subconsciously incorporated and normalised since birth, depending on the social class they were born into. Bourdieu and Passeron demonstrate how pupils from middle and upper class backgrounds are advantaged at school since their habitus corresponds to that favoured by schools, whereas pupils from disadvantaged backgrounds feel alien and yet have to learn the relevant social codes (ibid.: 40-44; Gehrmann 2019). They continue to argue that pupils from upper class backgrounds are equipped with considerable higher economic, cultural (intellectual and cultural knowledge, style of expression and dress, language etc.) and social (networks and influential relationships) capital than their counterparts from lower classes, which prevents the latter from having the same chances at educational attainment. Furthermore, following Bourdieu, the education system and pedagogical actions can be understood as a place of symbolic violence because they make underprivileged people accept their social position and blame themselves for their failure (Erler 2011: 26-30).

Education is used as a strategy to reproduce or ameliorate one's place in society, whereby people who already have economic, cultural or social capital at their disposal are always in a better starting position (Löw 2006: 46-49).

Based on Bourdieu's and Passeron's seminal work, recent research has identified school segregation as a major mechanism of reproducing educational inequalities. Agnès van Zanten, for instance, argues that the increase in people from lower socioeconomic backgrounds attending school has also led to the devaluation of qualifications and

credentials as well as to the elevation of the educational threshold required to succeed in the labour market and to achieve social inclusion. This has resulted in new struggles for status between social groups and in new social distinction mechanisms. Different subgroups of upper and middle classes have developed new and subtler mechanisms of social distinction and exclusion, like choosing specific schools, gentrifying neighbourhoods or establishing separate classes for children with high and low learning abilities respectively (van Zanten 2005).

In a similar vein, Bonal and Bellei (2020) discuss the complex and highly context-related mechanisms that lead to school segregation. They distinguish four groups of main factors, namely residential segregation; institutional characteristics of the school system such as early tracking; market-oriented reforms (e.g. school choice, voucher systems, school-based management reforms or contracting out of school services); and education policies to regulate admission or implement compensatory action. According to the given social context, these factors interact among themselves and with other social policies producing context-specific patterns of school segregation.

3.3. Theoretical approaches to educational inequalities in the Global South

The theoretical literature on inequalities in education with a global scope or a focus on the Global South is much scarcer than for the Global North.

Essential theoretical work on the particularities of education systems in the Global South, even though not focused on inequalities, has developed out of the dependency approach in the 1960s and 1970s (e.g. Altbach/Kelly 1978; Carnoy/Samoff 1990; Mazrui 1975) and later on in the framework of post-/decolonial approaches (e.g. Hickling-Hudson 1998; Mayo et al. 2002).

Importantly, these approaches point to the colonial origins of most education systems in the Global South. Although education policy differed between various colonial powers, there are some important similarities. Colonial education destroyed or marginalised precolonial forms of education in most colonial territories. Different to European trajectories of education systems, colonial education systems did not target the economic and social development of the colonised territories. Rather, they were driven by colonial interests, and mostly aimed at the formation of a small group of cadres for colonial administration (Bray 1997). Broad basic education, especially in rural areas, was neglected. Furthermore, colonial education was tightly entangled with 'civilization' projects and the transmission of 'Western' values, while indigenous knowledges, languages and values as well as traditional forms of education were often disregarded or suppressed (Osterhammel 1997: 106-110).

In terms of inequality, dependency, post-/decolonial and more recently approaches from critical sociology of education elaborate that colonial education systems were by definition stratified, elitist and exclusionary. After independence, continuities in education systems prevailed in most post-colonial states. Languages of instruction, curriculum and methods often remained those introduced by colonialism (McCowan 2015). Albeit many newly independent countries aimed at rapid educational expansion and praised education as a means to forge the new nation, the elitist character of formal education was hardly ever overcome. Education remained linked to social stratification in a much more obvious way than in the Global North, where larger state budgets indeed allowed for the universalisation of access to education (Carnoy/Samoff 1990: 67). Bourdieu's and Passeron's concept of "the meritocratic illusion", which conceals subtle mechanisms of social reproduction through schools, has less explanatory power in the Global South. Exclusion is bold here and universal access still an unmet promise. Despite official rhetoric on education as a human right, Southern elites do have an interest in conserving highly stratified education systems for purposes of their own social reproduction.

Research based on critical sociology of education and globalisation studies emphasises how global neoliberal policies from the 1980s onwards have negatively affected education systems in the Global South and how international development cooperation, most notably influenced by World Bank policy, has been widely complicit (cfr. Robertson et al. 2007). Despite an impressive educational expansion in the Global South since the second half of the 20th century budget constraints at certain times have caused important set-backs. In particular, the Structural Adjustment Programmes (SAPs) imposed in the 1980s by international financial institutions on many countries in the Global South caused a considerable decline in educational participation due to heavy cuts in education spending. By demanding to focus education spending in debtor countries on the primary subsector, the SAPs as well as World Bank sector lending strategies severely hollowed out secondary and higher education systems. Deprived of the possibilities to develop autonomous intellectual and technological capacities, poor countries remained stuck in the uneven global division of labour and in postcolonial dependence (Bonal 2002; Hickling-Hudson 2002; Klees 2008) (Bonal 2002).

Some more recent scholarship analyses why the policies of educational expansion in the era of poverty reduction strategies from the mid-1990s onwards have not helped to overcome educational inequalities. Indeed, the poverty agenda widely ignored the issue of educational inequality despite its obvious relation to poverty. This has to do with the poverty agenda being linked to the pre-dominant development model of earlier decades based on market-led growth strategies. Resonating the belief in the trickle-down effect of economic growth, anti-poverty policies prioritised targeted measures stemming from marketized education policies (e.g. school vouchers) rather than redistributive efforts (Bonal 2016).

By contrast, Bonal (2007) stresses the close relationship between education, poverty and inequality. Based on an exploration of how educational expansion failed to lead to poverty reduction in Latin America, he demonstrates the determining effects that poverty has on educational trajectories and attainments. Material obstacles, which restrict the possibility of poor people to invest in education, negative impacts of increased educational costs as well as intensified social distinction strategies and the devaluation of credentials are not considered enough or not acted upon enough in development approaches trying to activate human capital through education.

López and Tedesco have developed the concept of ‘educability’ in the Latin American context, emphasising that for learning processes to be meaningful a minimum of socioeconomic and socioemotional stability is a precondition. Rather than education being a viable means to overcome inequality, there needs to be a minimum level of social equality for educational practices to be successful (López 2004; López/Tedesco 2002).

Analysing the perseverance of educational inequalities, some scholarship has focused on the institutional stratification of education systems (e.g. Chiroleu 2014; Langthaler 2019; McCowan 2016a; Peters 2013). In this view, stratification is expressed in different socioeconomic value, in terms of the labour market and social mobility, attached to formally equal educational institutions or academic titles, e.g. private elite vs public schools of low reputation. For various reasons (e.g. school fees, support systems, entrance regulations etc.) access to the most highly valued institutions tends to be restricted for people from disadvantaged backgrounds limiting their possibility for upward social mobility.

In terms of global asymmetries, several publications discuss the uneven impact of globalisation on education systems in rich and poor countries (e.g. McCowan 2016b). Trends such as commodification, liberalisation and privatisation tend to weaken and fragment education systems to a much higher degree when state regulatory capacities are limited, public budgets are small and demographic pressure is high. Rising educational inequalities are one observable outcome in many countries. Others include deepening

epistemological asymmetries between the Global North and South leading to ever shrinking spaces for non-Western knowledge traditions (e.g. Stein et al. 2019).

All in all, the theoretical debate on educational inequalities in a global comparative perspective appears to be fairly fragmented. It would, therefore, be desirable to research this topic more intensively focussing on the specific colonial origins of educational asymmetries in the Global South and how the mechanisms of their reproduction have been translated and modified in post-colonial settings of an asymmetric global division of labour.

4. The Status of Inequalities in Education

There has been a substantial expansion of education worldwide and the average educational level of the global population has risen significantly. The percentage of children who are enrolled in primary school has risen from 72.31 % in 1970 to 91.24 % in 2020¹. The share of children without any school degree has dropped from 30.9 % in 1940 to 18.1 % in 1989 (Leone 2019: 3). At the level of higher education, the global number of university students has more than doubled from 2000 to 2014 (UNESCO 2017: 1).

However, 17 % of children, adolescents and youth worldwide – approximately 258 million in total numbers – were not in school as of 2018. 1 in 12 primary school-age children, 1 in 6 lower secondary school-age adolescents, and 1 in 3 upper secondary school-age youth were excluded from education (UNESCO 2020: 7, 231)². Furthermore, the number of persons who do not have access to quality education and consequently life opportunities is not distributed evenly across the globe. Great inequalities between and within richer and poorer countries continue to exist.

We will first discuss cross-country inequalities and then delve into internal inequalities before finally addressing the role of COVID-19.

4.1. Inequalities between countries

Despite an increase in educational participation in all regions of the world, there are significant differences between them, especially when comparing rich and poor countries. Only 1 % of children of primary school age are out of school in Europe and North America, while their share amounts to 7 % in Southern Asia and to 18 % in Sub-Saharan Africa. As Figure 1 below depicts, stark differences in enrolment rates between world regions remain and they increase by education level.

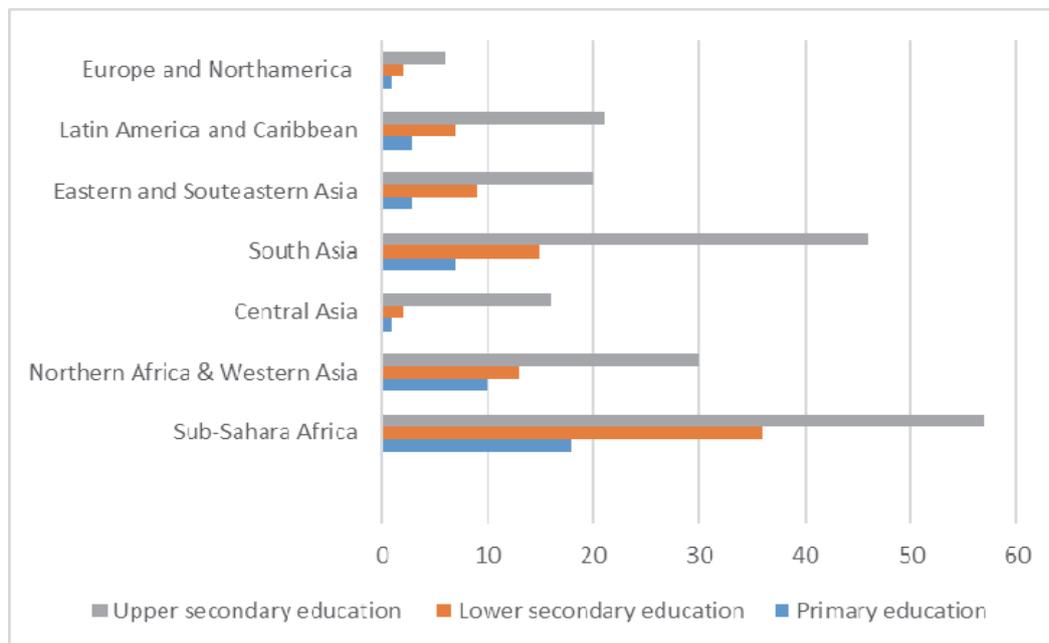
Gender disparity in out-of-school rates has declined over the last decades at the global scale. However, there are noteworthy regional differences. While in Eastern Asia, the out-of-school rate for females and males are equally low at 3 %, Sub-Saharan Africa (23 % of girls, 19 % of boys out of school), Oceania (14 % and 9 %), and Western Asia (14 % and 8 %) have the highest gender gap.

Leone (2019) compares educational expansion at the global scale in a historical perspective. He emphasises that while the number of completed school years has risen in all parts of the world since 1940, the gap between the richest and the poorest countries has remained. In Sub-Saharan Africa, the average number of school years has increased from 2.4 to 6.2 between 1940 and 1980. In the richest countries, it has risen from 10.5 to 14.1 over the same period, indicating a persisting substantial difference in educational participation between the Global North and South (Leone 2019: 5).

¹ UNESCO Institute for Statistics database: <http://data.uis.unesco.org/#> (22/12/2022)

² See also: <http://uis.unesco.org/en/topic/out-school-children-and-youth> (22/12/2022)

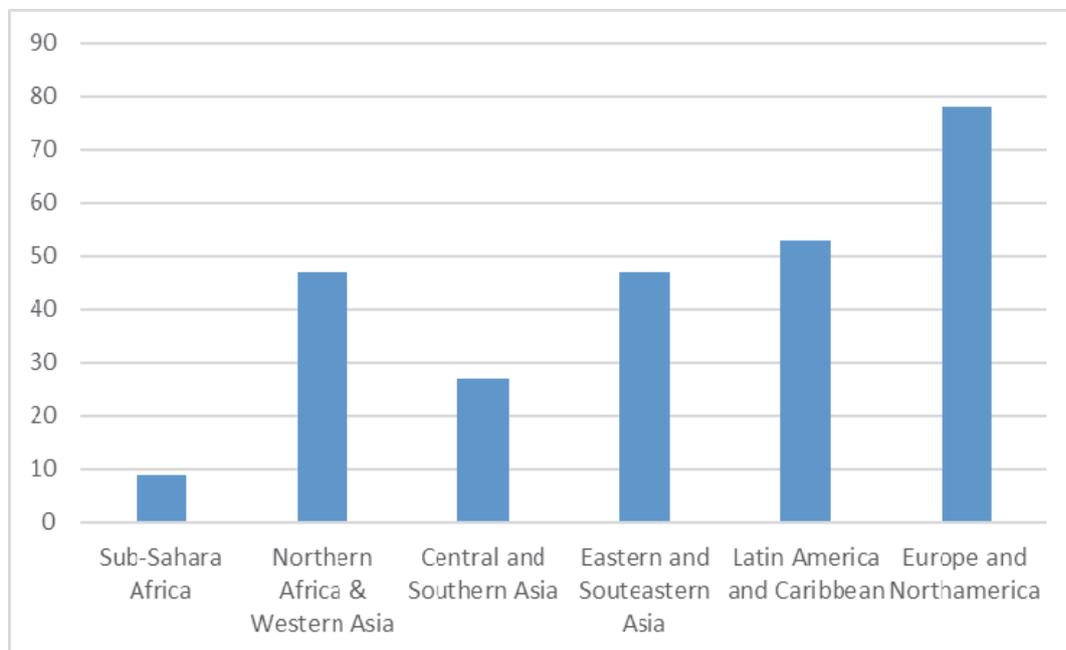
Figure 1: „Out-of-school-rate“, primary, lower and upper secondary education, percentage of relevant age group (2019)



Source: UNESCO 2021a: 413

Global asymmetries are equally stark at the level of higher education, as set out in Figure 2.

Figure 2: Gross enrolment ratio in higher education, percentage of relevant age group (2019)



Source: UNESCO 2021a: 433

4.2. Inequalities within countries

Educational opportunities, resources and achievements are highly dependent on factors like gender, wealth, remoteness, religion, ethnicity, language, migration, sexual orientation or disability (UNESCO 2020: 4). The most likely reason to be disadvantaged in and excluded from education is poverty, but language, location, gender and ethnicity are also relevant factors (ibid.: 7).

The UNESCO points out stark educational inequalities in terms of socioeconomic background (UNESCO 2021a). In Sub-Saharan Africa, only 3 % of the poorest males and 1 % of the poorest females complete upper secondary education. Disparities according to wealth are most notable at the level of higher education. In some African countries (e.g., Burkina Faso, Liberia, Malawi), the higher education enrolment rate of persons from the lowest income quintile is statistically insignificant (Ilie/Rose 2016: 449). University expansion in the Global South over the years has mostly benefitted middle- and upper- income groups, and the gap between rich and poor has even increased (ibid.: 449).

While gender disparities have generally decreased, they are still problematic in many regions. In addition, when intersecting with other inequality categories like location and wealth, disadvantages for females are especially pronounced. In at least 20 countries, most of them located in Sub-Saharan Africa, not even 1 % of poor rural young women complete upper secondary school (UNESCO 2020: 68). Importantly, among adults, illiteracy rates continue to be much higher among women than among men, which is especially noticeable in rural areas (UNESCO 2022).

4.3. The effects of COVID-19 on educational inequalities

The educational effects of the COVID-19 pandemic are still difficult to measure, but there is a consensus among researchers and policy makers that the pandemic has deepened many of the global and local inequalities in education that have already existed before (Stewart 2021). A recent report underlines that the negative impacts of the pandemic are stronger in low- and middle-income countries since, compared to high-income countries, school closures often lasted longer and government's responses have been less effective. The transition to distance learning has proven more difficult in many low- and middle-income countries, mainly because of a lack of access to electricity, connectivity, devices and support among learners. Not even 5 % of children in West and Central Africa have access to the internet. In Southern and Eastern Africa the number amounts to 12 %, while it is 52 % in Latin America (UNESCO et al. 2021).

The economic crisis resulting from the pandemic, and most recently the war in Ukraine, has hit the countries of the Global South disproportionately harder than those of the Global North. The World Bank estimates that 75 to 95 million more people than projected before the pandemic will experience extreme poverty in 2022, accounting for a total of 657 to 675 million³. The ability of governments in poorer countries to raise support programmes is limited. In addition, a decline in household income has a stronger negative impact on the education of children from families that were already poor before the pandemic than on those from families with fundamentally better incomes. Poverty can severely damage children's ability to learn, for example, through malnutrition and health problems, or through the need to support the family financially through work or household chores. Domestic and sexual violence, teenage marriages and pregnancies are other problems that increased sharply during the pandemic, especially among the poorest segments of the population. Affected children and adolescents are also most at risk of not returning to school after the lockdowns – with long-term consequences for their job and health prospects (Stewart 2021).

³ See <https://blogs.worldbank.org/opendata/pandemic-prices-and-poverty> (22/12/2022)

5. The policy discussion on inequality in education

Policy discussions on how best to tackle inequalities in education have existed for some time. Famously, in the 1960s, research on race and class based educational disparities in the USA (Coleman et al. 1966) brought about policies of affirmative action addressing disadvantaged students. In Europe, a variety of policies has been applied in different countries to respond to persistent class and gender based educational disparities, with differing effects. Generally, educational equality – and equity – appears to be greater in countries with more comprehensive school systems that forgo early tracking such as the Nordic countries (Bonal/Bellei 2020). In the last decades, the altered social compositions of schools following increased immigration processes have given new impetus to discussions on educational inequalities in Western countries. This has even increased in the aftermath of the school closures induced by the COVID-19 pandemic.

In international development, during the last decades educational equality had not been at the forefront of policy discussions. Rather, following a human capital paradigm, policies focused on absolute enrolment numbers, in particular at the level of primary education. While the international agenda Education for All (EFA) (1990–2000 and 2000–2015)⁴, coordinated by UNESCO, aimed at universal basic education, emphasising the educational needs of marginalised groups, the predominance of the UN Millennium Development Goals (MDGs)⁵ from the year 2000 onwards led to a narrowing of international efforts. Indeed, the MDGs introduced a technocratic understanding of educational expansion focusing on primary education without particular attention to causes of or remedies against educational inequalities (Rose 2016: 397). Gender was an exception to this, with a specific gender goal in both the EFA and the MDG agendas.

In the run-up to a new international development agenda in 2015, it became obvious that the educational goals had been obtained only to a very limited extent. Generally increased enrolment rates in primary education (from 84 % to 93 % in developing countries) and improved gender parity rates contrasted with very little improvement in early childhood care and education, adult literacy, education quality and vocational education (UNESCO 2015b). Importantly, the expansion in enrolment had occurred mainly within middle and upper classes, while the lower classes had experienced serious difficulties in benefitting from it. Overall, educational disparities, with the exception of gender, had even increased⁶.

5.1. Educational equity in the SDGs

Based on this observation, equity became a key issue in the debates on an educational goal in the upcoming international agenda. Thanks to a broad and relatively inclusive discussion process actively including civil society actors equity gained a prominent status in the wording of what was to become the SDG 4 (Benavot/Smith 2020; Unterhalter 2019; Wulff 2020):

“Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all”⁷

However, the discussion process prior to 2015 was not without tensions. Unterhalter (2019) describes a conflictive situation between an economic/utilitarian and a social/humanistic approach to the issues of equity and quality (see also Benavot/Smith 2020; Wulff 2020). The former put forward a concept of equity linked to expanding formal rights to education to disadvantaged groups and a concept of quality linked to learning outcomes. By contrast, the

⁴ See <https://en.unesco.org/gem-report/report-education-all-efa> (22/12/2022)

⁵ See: <https://www.un.org/millenniumgoals/> (22/12/2022)

⁶ For an extensive discussion on the EFA Agenda and the SDG 4 see (Langthaler 2015a).

⁷ See <https://sdgs.un.org/goals/goal4> (22/12/2022)

latter promoted an understanding of quality linked to free and inclusive education as well as education for sustainability, rights and gender. In terms of equity, the humanistic approach lobbied for an understanding that included intersectional inequalities and was linked to social justice. Wulff (2020) emphasises that an increased focus on learning outcomes, and on how to measure them, promoted for instance by the World Bank⁸, tends to shift attention towards individual performance and away from structural issues such as exclusion from and social reproduction through education.

However, while civil society succeeded in having a strong impact on the main text of the SDG 4, it was less successful in influencing the definition of indicators for SDG 4 and its sub-goals⁹. Here, a narrow approach of measuring equity through enrolment rates prevailed (Unterhalter 2019). Major criticism by critical academics and civil society was also advanced against the wording of SDG 4.5.¹⁰, which specifically targets educational equity, for not explicitly stating socioeconomic disparities (e.g. McGrath 2016; Education International 2015).

5.2. The public vs. private debate

Linked to the discussion on different understandings of equity and quality in education, there is the debate on education as a public good and the role of the state vs. that of private actors. The background to this is that the market paradigm, despite rhetoric shifts, has in practice never been questioned in the mainstream development debate. To the contrary, based on assumptions of “state failure”, less not more state intervention has been considered helpful in terms of poverty reduction and increased (educational) equality (Bonal 2016: 106f).

The public vs. private debate has essentially accelerated against the background of a rapid increase in private education provision in the Global South known as “low cost private schools”. While private schools have a long tradition in many countries of the Global South, low cost schools, often run by international for-profit providers, have introduced a new feature. Traditionally, private education used to be either very costly targeting the elites or it was provided as part of (often faith-based) welfare programmes targeting the poor population.

Low cost private schools have mushroomed in the last two decades in low-income countries. While lauded by some in terms of an indispensable complement to overburdened public schools and even of an instrument of quality improvement through increased competition, others warn against some severe risks¹¹. These include inadequately prepared teachers and doubtful quality of education leading to increased social inequity through further stratification. Indeed, as studies show, for-profit education providers often apply approaches that are similar to the automation of industry or services: Human operators, often instructed through tablets from remote locations, are supposed to replace qualified, and costly, teachers (Riep/Machacek 2016). In some cases, African governments have shut down “low fee private schools” operated by international providers for concerns over quality¹². In 2020, the World Bank’s International Finance Cooperation (IFC) announced that it would freeze investments in private, fee-charging schools “in response to concerns by external stakeholders about the impact of private schools on education quality and access”¹³. In addition, during the school closures induced by the COVID-19 pandemic, low cost private

⁸ See e.g. the World Bank Development Report 2018 — LEARNING to Realize Education’s Promise, (The World Bank 2018)

⁹ See <https://sdgs.un.org/goals/goal4> (22/12/2022) for a complete list of SDG4 targets and indicators

¹⁰ SDG 4.5. “By 2030, eliminate gender disparities in education and ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, indigenous peoples and children in vulnerable situations.” See: <https://www.sdg4education2030.org/the-goal> (22/12/2022)

¹¹ For an overview of the academic discussion (see Härmä 2015).

¹² See e.g. <https://venturesafrica.com/closing-bridge-uganda-shuts-schools/> (22/12/2022).

¹³ See https://www.ifc.org/wps/wcm/connect/Industry_EXT_Content/IFC_External_Corporate_Site/Education (22/12/2022)

schools proved to be the least resilient among all schools. Often, they were the first to shut down, dismissing their teaching force and leaving their students without any support (Alam/Tiwari 2021).

In 2019, in response to growing concerns about the impact of privatisation processes by human rights and civil society actors, the Abidjan Principles on the Right to Education were adopted, which “compile and unpack existing legal obligations that States have regarding the delivery of education, and in particular the role and limitations of private actors in the provision of education”¹⁴. Since their adoption, they have been recognised by the main UN and regional bodies working on the right to education, such as the UN Human Rights Council, the African Commission on Human and Peoples’ Rights or the European Committee of Social Rights.

Nevertheless, the further development of the policy debate since 2015 shows a clear trend of the private sector increasingly gaining influence in education on a global level. The COVID-19 pandemic has acted as a catalyst in this regard. Forced to seek means to maintain schooling during the lockdowns, many governments adopted technological devices offered by private companies to ensure distance learning. This has opened up a huge market for the so-called global education industry, which has gained considerable political influence during the pandemic. The effects of these privatisation processes are likely to persist, first as blended models of distance schooling, and in the longer term as hybrid models embedding educational technology (edtech) in curricula, school management and assessments (Williamson/Hogan 2020).

At the political level, the accelerated impact of private edtech on education systems has generated discussions about “re-imagining education”. Yet, the ideas circulated around this topic are aligned with corporate edtech solutions, rather than with the global agenda of socio-ecological transformation¹⁵. What might seem a useful complement by the private sector to traditional schooling boosting creativity and innovation runs in fact the risk of increasing educational inequity and exclusion. In her 2020 Report, the UN-Special Rapporteur on the right to education warned against the growing influence of private actors, in particular transnational corporations, in education. Risks include the capture of limited public resources by corporations, lack over control of data collection and misuse of corporate influence, e.g., on curricula (Human Rights Council 2020).

Globally increased educational exclusion and inequity in education through the COVID-19 pandemic has multiplied attention at the policy level, in particular by multilateral organisations such as the UNESCO, the World Bank and the OECD (see e.g. Reimers/Schleicher 2020; The World Bank 2020; UNESCO et al. 2021). It is remarkable, however, that the recommended strategies to counter these developments refrain from introducing a new emphasis on strong, resilient and equitable public education system. Rather the contrary is the case. At the structural level, reference is put on innovation (i.e. digitalisation) and new partnerships (i.e. private sector engagement) to ensure resilience of education systems, while disadvantaged groups should receive targeted support.

By contrast, civil society organisations call for intensified efforts to (re)build public education systems. To do so, they call on governments to implement progressive tax reforms to allow for an increase in tax-to-GDP ratios. In addition, they consider debt cancellation and debt restructuring vital to facilitate that governments can prioritize investments in quality public services (Education International/Action Aid 2022).

¹⁴ See: <https://www.abidjanprinciples.org/> and (Adamson et al. 2021)

¹⁵ See e.g. the paper “Education Reimagined: The Future of Learning” published by the Microsoft Corporation (Fullan et al. 2020).

5.3. The discussion on policy tools

Interestingly, despite evidence on the key role of school segregation in the reproduction of educational inequalities, desegregation policies have not been a priority, neither in the Global North nor in international development. An exception to this are countries where wider societal reform efforts targeting social equity have triggered substantive educational desegregation processes. A well-known example of this is Cuba, where both educational equity and performance rates outdo other Latin American countries (Carnoy et al. 2007). However, in most countries, educational equity policies merely attempt to mitigate the detrimental effects of school segregation, e.g. through compensatory measures targeting either groups of disadvantaged students or schools with a high concentration of at-risk students (Bonal/Bellei 2020: 14f).

Among the most applied and discussed tools are vouchers and school choice to increase families' possibilities to escape low-quality schools. On the other hand, zoning (defining geographic zones from where schools accept their core intake of students) is intended to mitigate the segregational effect of increased school marketing. However, as Bonal and Bellei (2020) discuss, mechanisms leading to school segregation strongly interact with socioeconomic (e.g. income disparities), cultural (e.g. social distinction strategies of middle classes) and socio-spatial (e.g. social composition of residential areas) dynamics making these mechanisms highly context-dependent. As a consequence, some of the measures introduced to tackle educational inequities in specific contexts have resulted in producing or increasing school segregation in others. For example, compensatory policies for certain schools can have stigmatizing effects, which in turn increase "school flight" by middle class families and exacerbate school polarisation among social groups (ibid.: 9). All in all, there is little scientific evidence about the effectiveness of policy tools mitigating school segregation effects (ibid.: 16).

In the context of poverty reduction strategies in international development, conditional cash transfers (CCTs) have been a particularly discussed tool, meaning the direct transfer of money to poor families on the condition that their children will be sent to school. Originating in the 1990s in Brazil in the context of the Bolsa Escola and Bolsa Familia programmes and in Mexico in the Progreso/Oportunidades programme, CCTs were later on adopted by the World Bank as a major policy tool. Research findings on CCTs' effectiveness are mixed and point to increased school access rates, but little evidence for increased school performance (e.g. Glewwe/Kassouf 2012) and generally a highly context-dependent impact on poverty reduction. Important factors for the latter are the choice of beneficiary groups, interaction with other social policies and (unintended) social dynamics triggered by CCTs such as the undermining of social cohesion in the community. Generally, CCTs were found to have the best results when well embedded in wider social policies and targeted at increasing the educability of poor children (Bonal et al. 2018).

Other important policy tools in terms of educational equity are integrated programmes combining educational and social protection measures, in particular school feeding programmes, as well as increased investments in early childhood care and education (ECCE) (UNESCO 2021b). The latter point to the cumulative effects of educational inequalities increasing with school levels. There is broad evidence that these dynamics are best countered with early interventions aiming at balancing disparities of social, cognitive and emotional child development even before primary school age¹⁶. However, particularly in the Global South ECCE systems tend to be limited in coverage, fragmented, little regulated and of highly diverse quality (UNESCO 2021a: 134f).

¹⁶ For a literature review see (Rao et al. 2014)

6. Conclusion

This Briefing Paper has attempted to draw attention to two aspects. First, despite massive global expansion of participation in education, asymmetries in access, input and outcome continue to exist within and between countries, and particularly between the rich and the poor. This indicates that widening access to education does neither automatically translate into increased educational equality nor equity.

Second, global educational disparities are rooted in the colonial past and the postcolonial global asymmetric division of labour. They are deeply entrenched with disparities of wealth, power and social stratification. As the COVID-19 pandemic has shown, innovation processes such as digitalisation, privatisation and commodification, when layered over inequitable education systems tend to exasperate rather than mitigate inequalities. Hence, inequalities in education will not be “managed away” through specific measures targeted at vulnerable groups, which have empirically proven to be of limited effect. Rather, overcoming educational inequalities requires profound systemic change.

As a first conclusion, it is therefore important to consider educational inequalities in their wider social context. A policy consequence of this points to the necessity of integrated programmes that combine measures to increase educability, ensure school access, reduce school segregation and support learning outcomes with policies increasing family income and wellbeing as well as wider social equity. Yet, at the political level, this points to the necessity of developing an understanding of education policy as being a highly contested social field. Control over education policy is key to privileged groups for defending their social status. Despite lip service, equity in education is therefore far from being a widely consensual policy objective. This holds particularly true in countries with substantive social inequities and polarisation, including many countries in the Global South.

A second conclusion, in particular in the light of the global post-COVID challenges, points to the necessity of placing the concept of ‘education as a public good’ centre-stage. This means (re)building resilient public education systems, designing them to provide equal opportunities and embedding them in wider social support policies. There remains much to be done in order to fulfil this task in rich countries. Yet, the challenge is disproportionately greater in the Global South where public resources are scarce. In terms of development policies, it is therefore urgent to support poor countries in their endeavour to create adequate public education budgets. In this regard, a focus should be placed on increasing the domestic tax base (e.g. through the introduction of fair global tax and debt regulations) and to encourage countries to earmark an adequate percentage for public education spending¹⁷. In addition, regulations on private sector education provision, e.g. based on the Abidjan Principles, should be elaborated and enforced both at transnational as well as at national level.

A third conclusion arises with regard to the necessity of strengthening research and theory development on reproduction mechanisms of educational inequalities in a global comparative perspective. This might become even more urgent in the light of technology- and crisis-induced global socioeconomic transformation processes that will impact education systems worldwide, although in different ways and to different extents.

¹⁷ The Education 2030 Framework for Action has set two key finance benchmarks for governments: at least 4 % to 6 % of GDP and/or at least 15 % to 20 % of public expenditure shall be allocated to education(UNESCO 2016).

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