



**Equity in Tertiary
Education:
Analytical Framework**
Hong Kong, 18 June 2019







Talent is universal, but
opportunity is not

Tanitoluwa Adewumi, a refugee from Nigeria who lives in a shelter in New York City, went from chess novice to chess champion in little over a year.

The story of two Nobel prize winners (almost)

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Global Tertiary Education Expert



Lord Rutherford



Chris Langan

Lord Rutherford

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Chris Langan, most intelligent person in the world

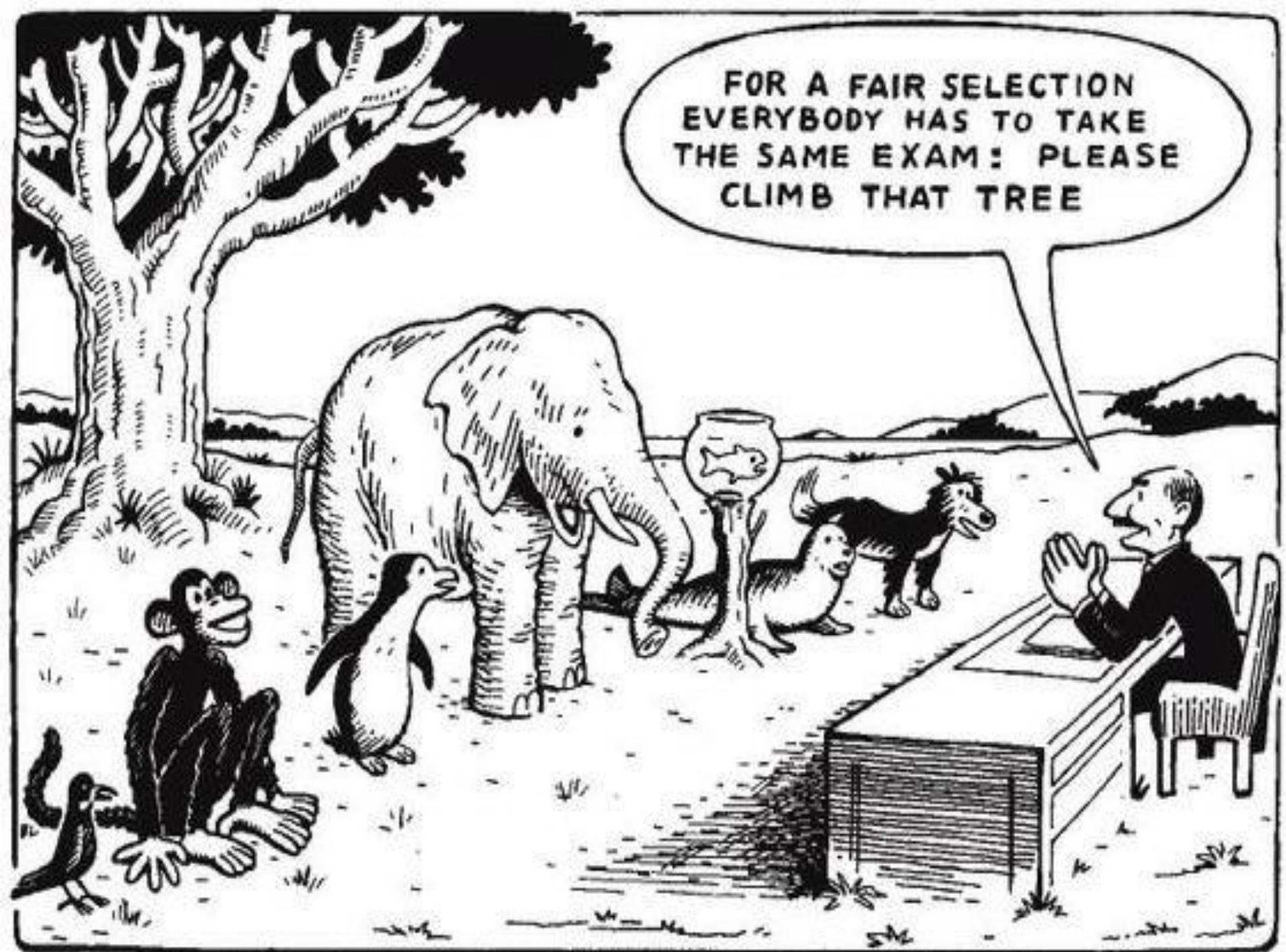
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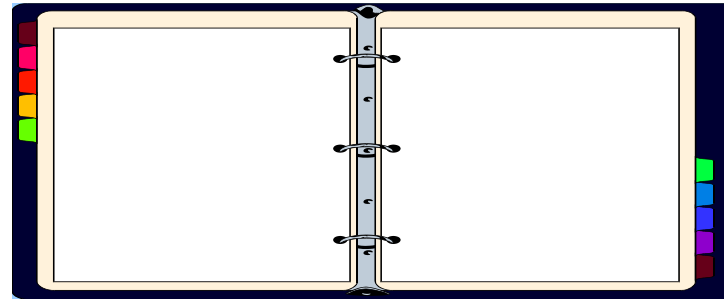


FOR A FAIR SELECTION
EVERYBODY HAS TO TAKE
THE SAME EXAM: PLEASE
CLIMB THAT TREE



Outline

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- Why equity matters
- Determinants of inequality
- Equity promotion policies

Enrolment vs. equity

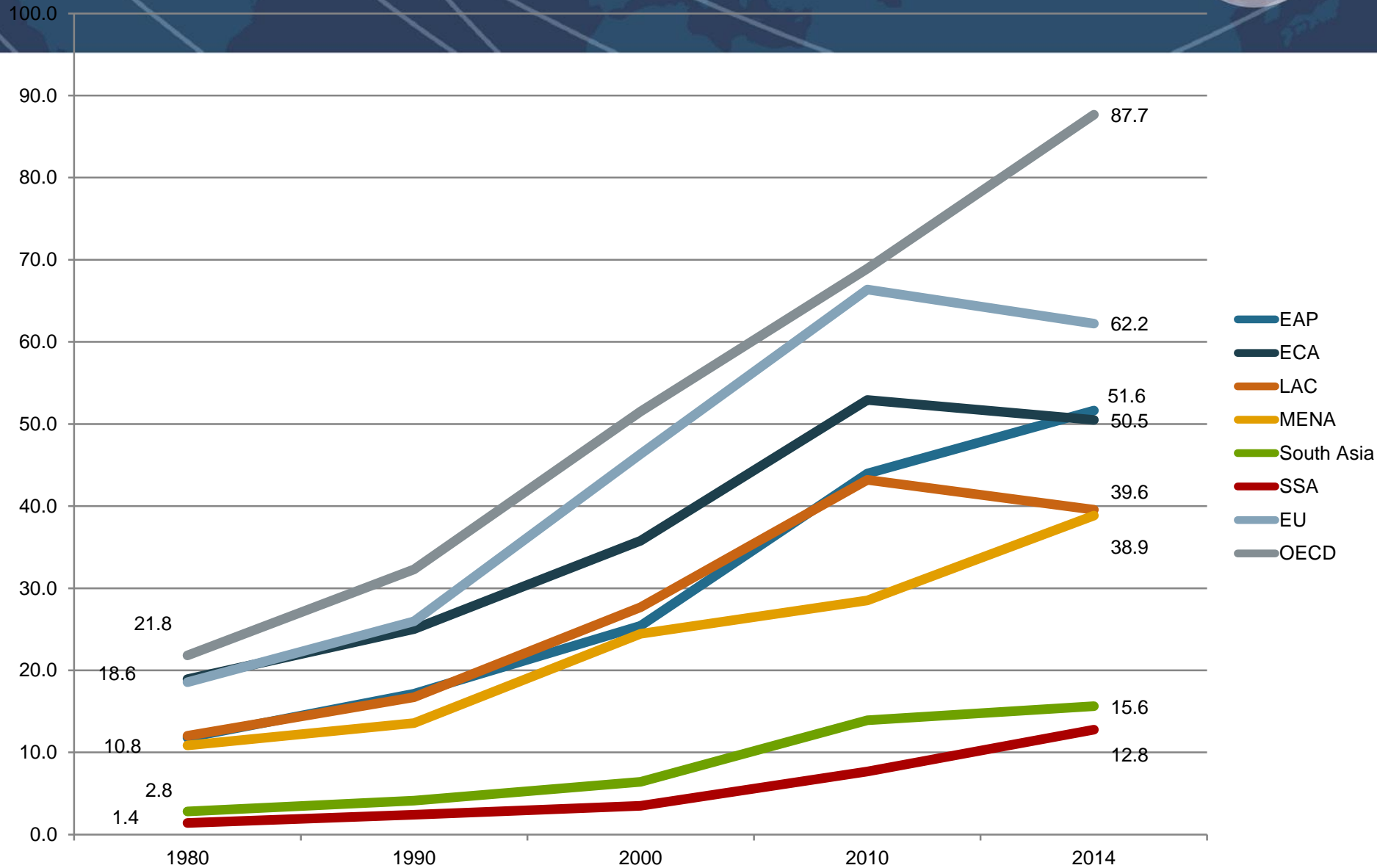
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- In spite of rapid enrollment growth world-wide, tertiary education remains largely elitist, with strong disparities in access and success persisting in high, middle and low income countries

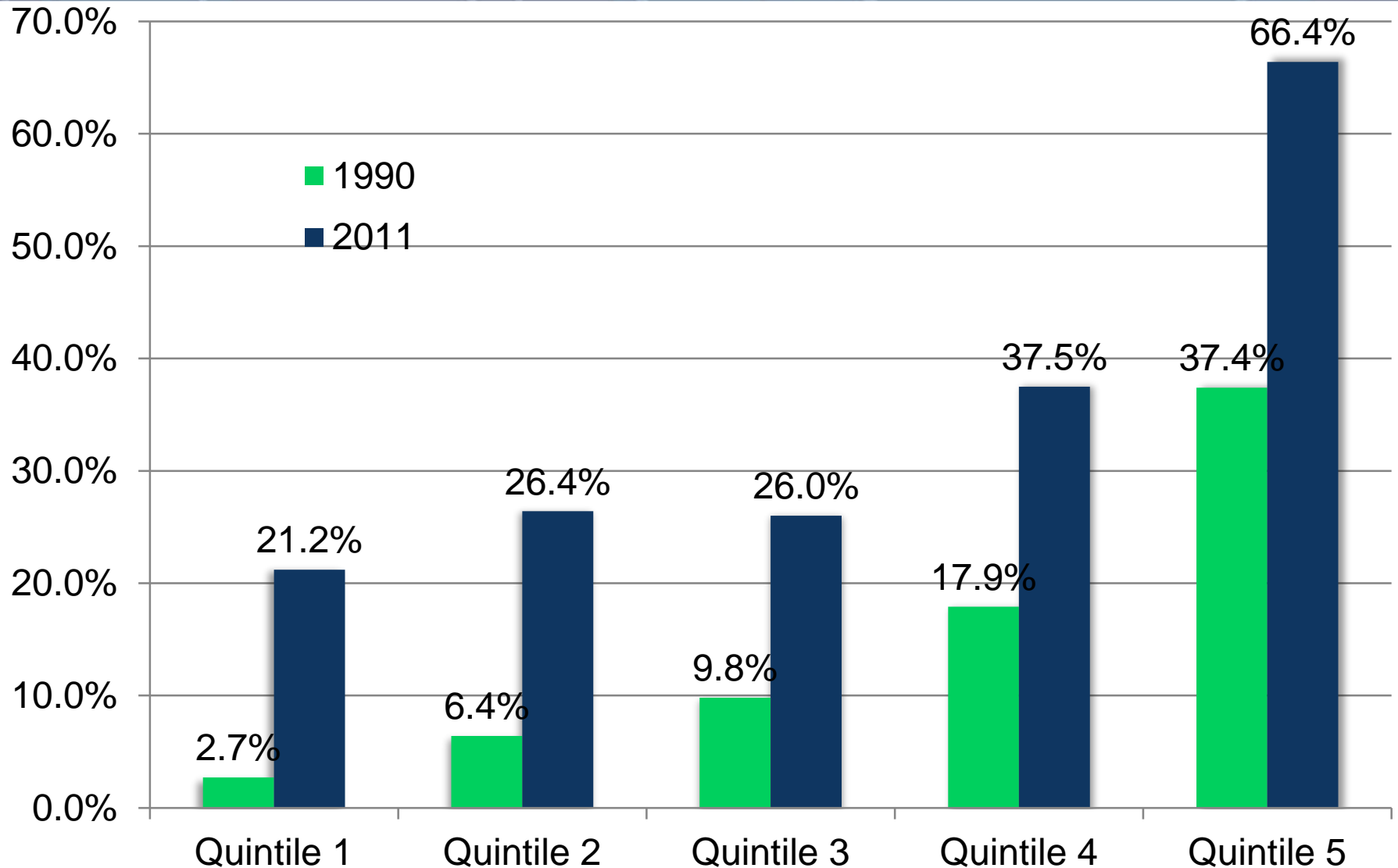
Evolution of Tertiary Education Enrollments Rates (1980 – 2014)

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Enrollment rate by income quintiles in Chile (1990 – 2011)

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The equity imperative

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- Social justice
 - Risk of political instability

A man with a beard, glasses, a nose ring, and a cap is sitting on a sidewalk. He is wearing a dark jacket over a graphic t-shirt and dark pants. He is holding a white sign with handwritten text. The background consists of a sidewalk and a ground covered with fallen yellow and brown leaves.

One day the
poor will have
nothing left
to eat
but the rich.



The equity imperative

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- Social justice
- Loss of talent

How many talented girls are lost?

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A genius in each of us?

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Assumption

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- Equity = providing equal opportunities for access and success in tertiary education
- Circumstances beyond an individual's control should not influence a person's chances

Equity groups

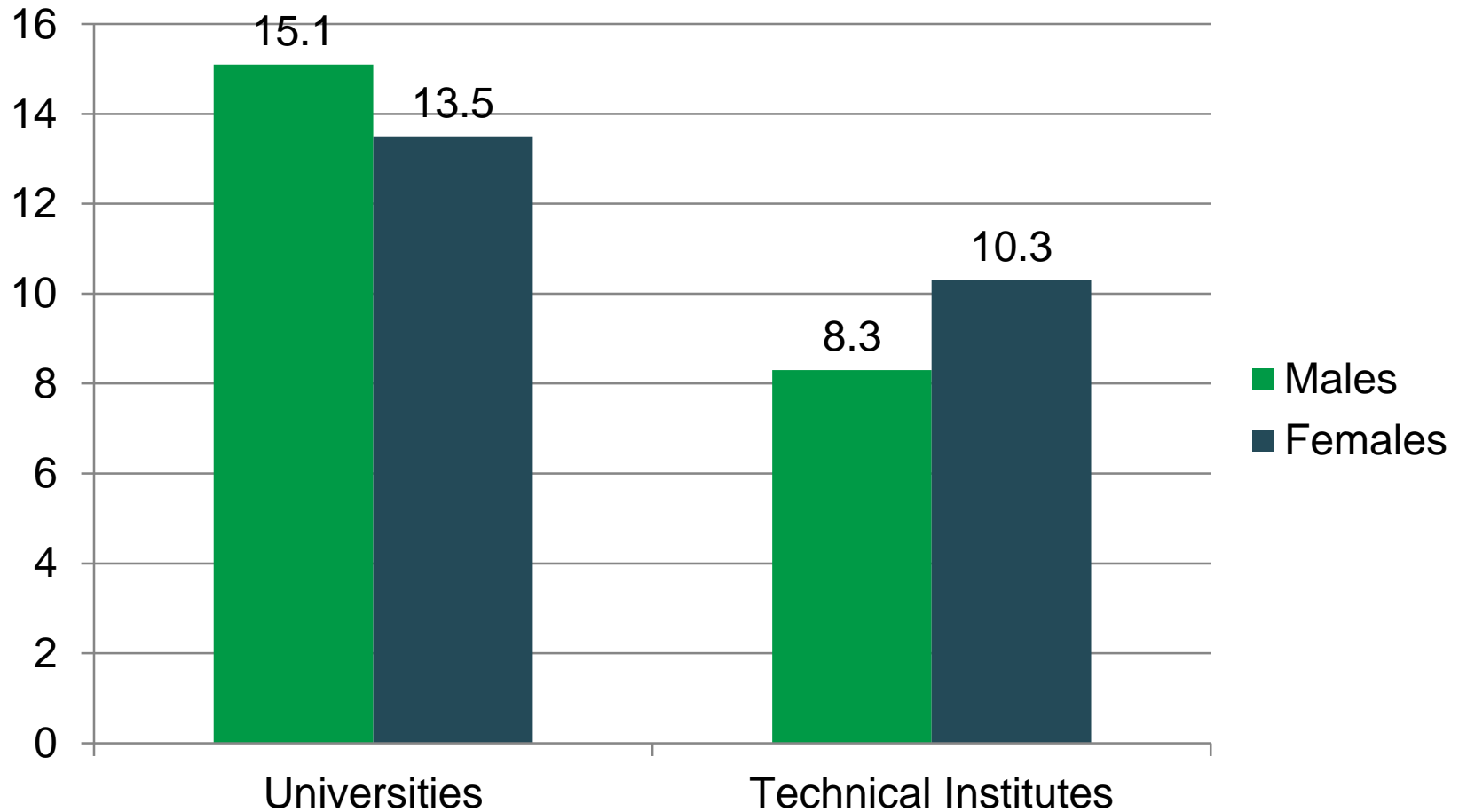
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- Low-income groups
- Females
 - Non-university institutions

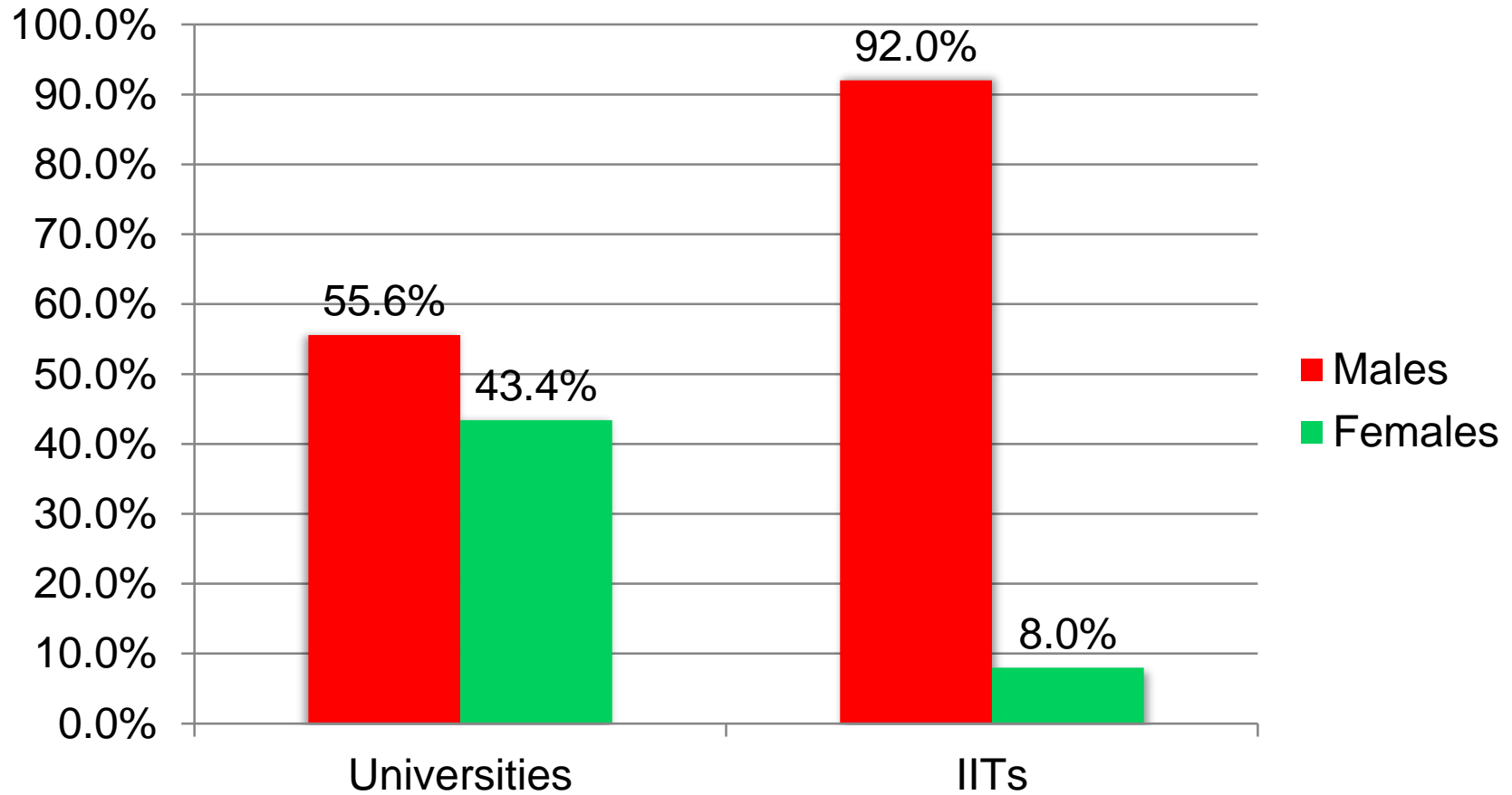
Gender distribution in Peru

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Gender distribution in India

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Equity groups

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- Low-income groups
- Females
 - Non-university institutions
 - Disciplines (agriculture, medicine, business, science and engineering programs)
 - Leadership positions

Equity groups

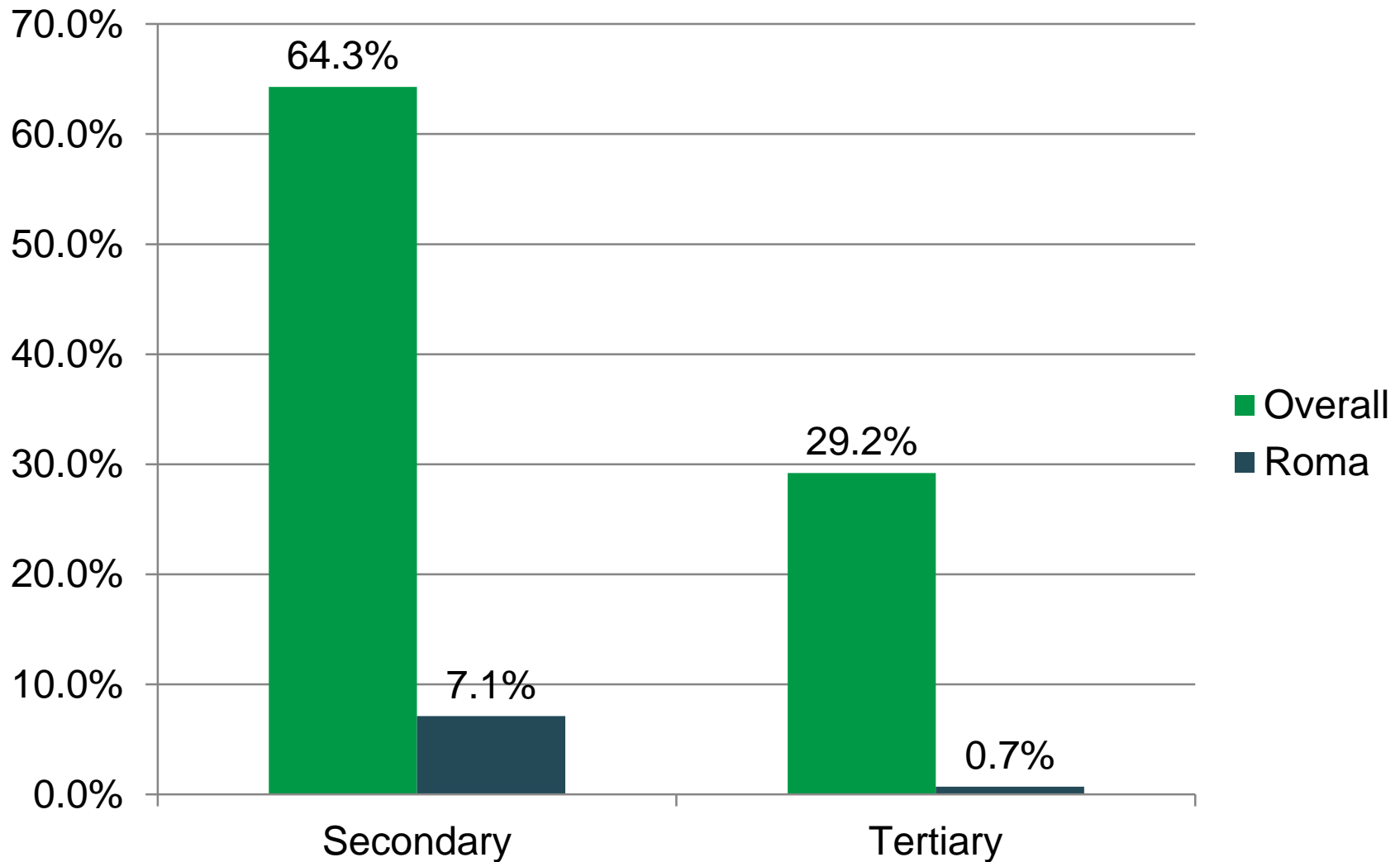
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- Minorities (ethnic, language, religion, culture, age, etc.)
 - Israel: Arab population = 19% of total population, but only 11% of students at universities
 - Growing barriers faced by children of migrants (Berlin, Spain, USA, Netherlands)

Romania completion rates

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Equity groups

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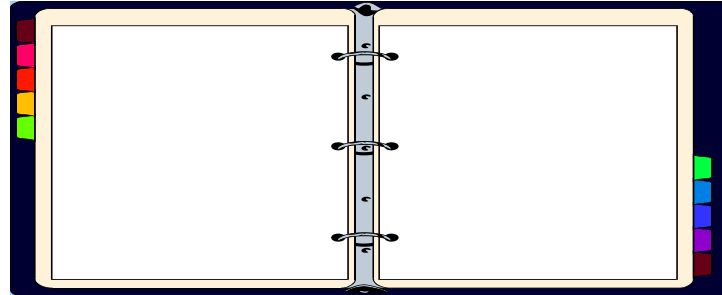
- People with disabilities
 - In France, only 7% of universities have a system to accommodate students with disabilities





Outline

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- Why equity matters
- **Determinants of inequality**

Where it all starts...

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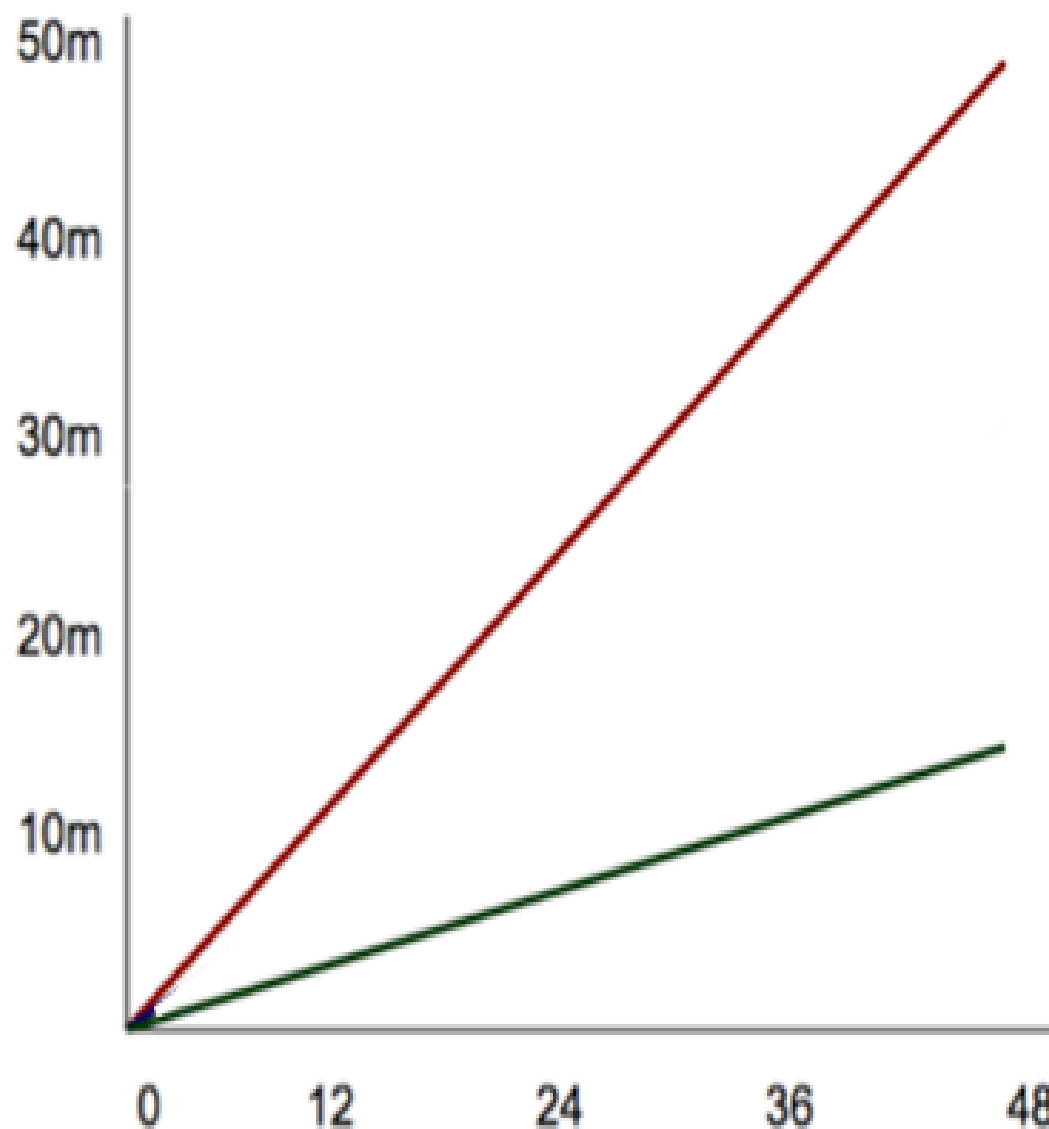
- Inequality in tertiary education is, to a large extent, an extension of inequality at lower levels of education
 - Reflecting structural barriers (income, ethnicity, gender, language, culture, religion, disability, caste, etc.)

Choose your parents carefully...

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Estimated
total words
addressed
to child
(in millions)



U.S.
professional
families

U.S. families
on welfare

Age of child (in months)

United States

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- By age 3, children from wealthy families have heard 30 million more words than those from low-income families
- By age 4, there is an 18-month academic gap between an impoverished child and his wealthier peers

3 Year Old Children



Normal



Extreme Neglect



"IT GOES IN CYCLES, JUNIOR. SOMETIMES, THE RICH GET RICHER AND THE POOR GET POORER. SOMETIMES, THE RICH GET RICHER AND THE POOR STAY THE SAME."

And it gets worse...

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- The main additional barriers at the tertiary level are of two kinds:
 - Financial
 - Non-financial

Free is fair?

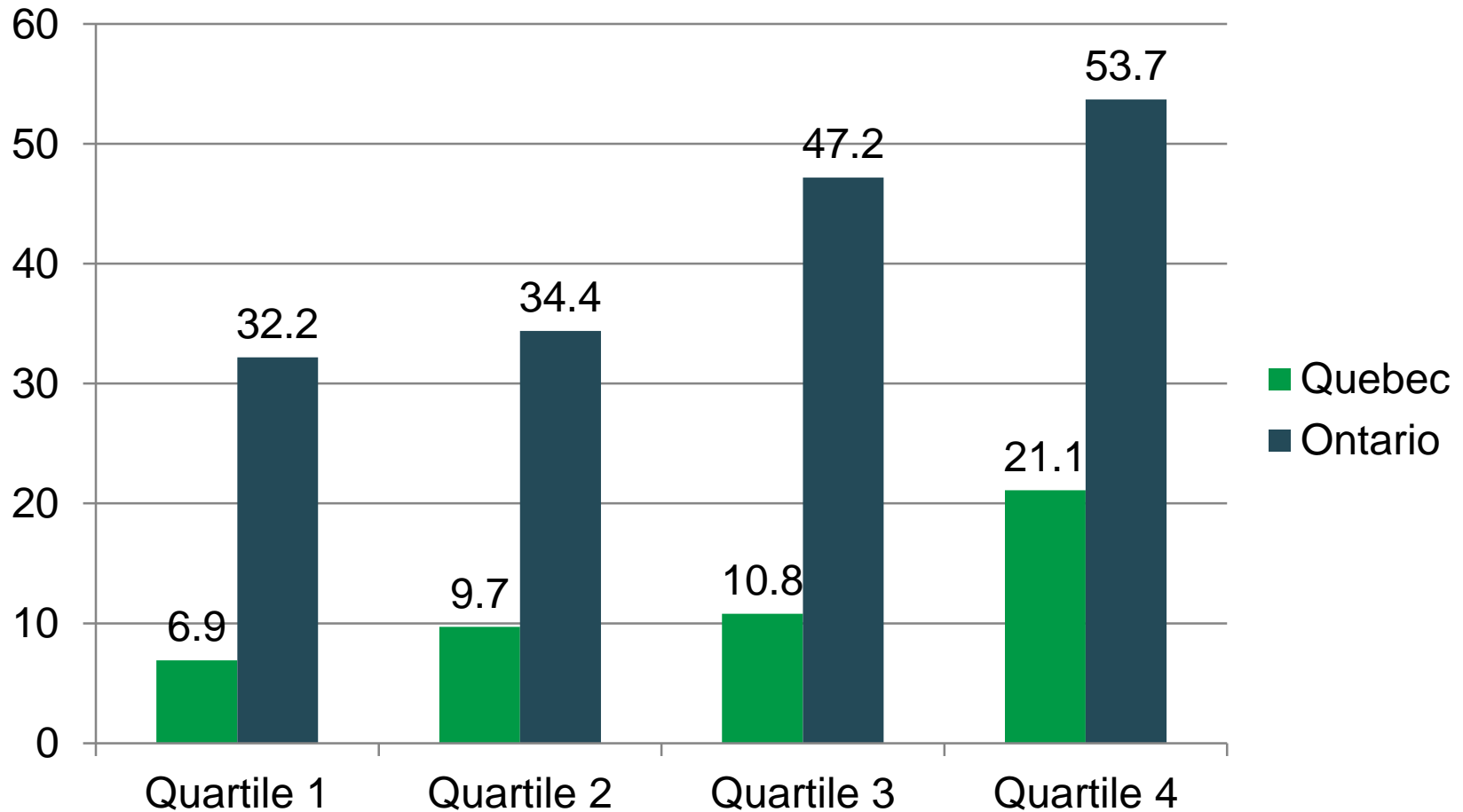
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- Canada: average undergraduate tuition fees:
 - in Quebec: \$2,700
 - in Ontario: \$7,500

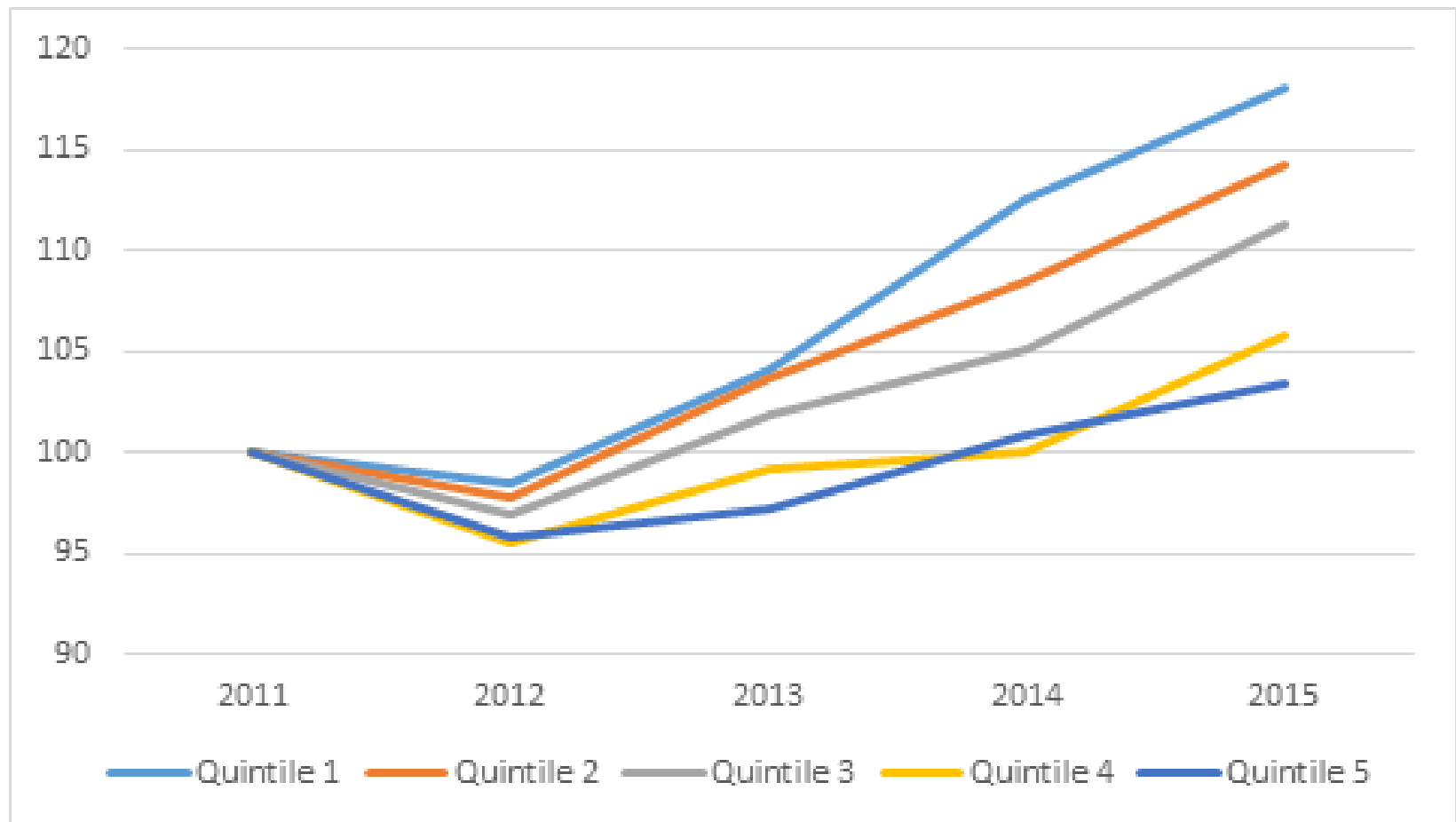
University participation at age 19

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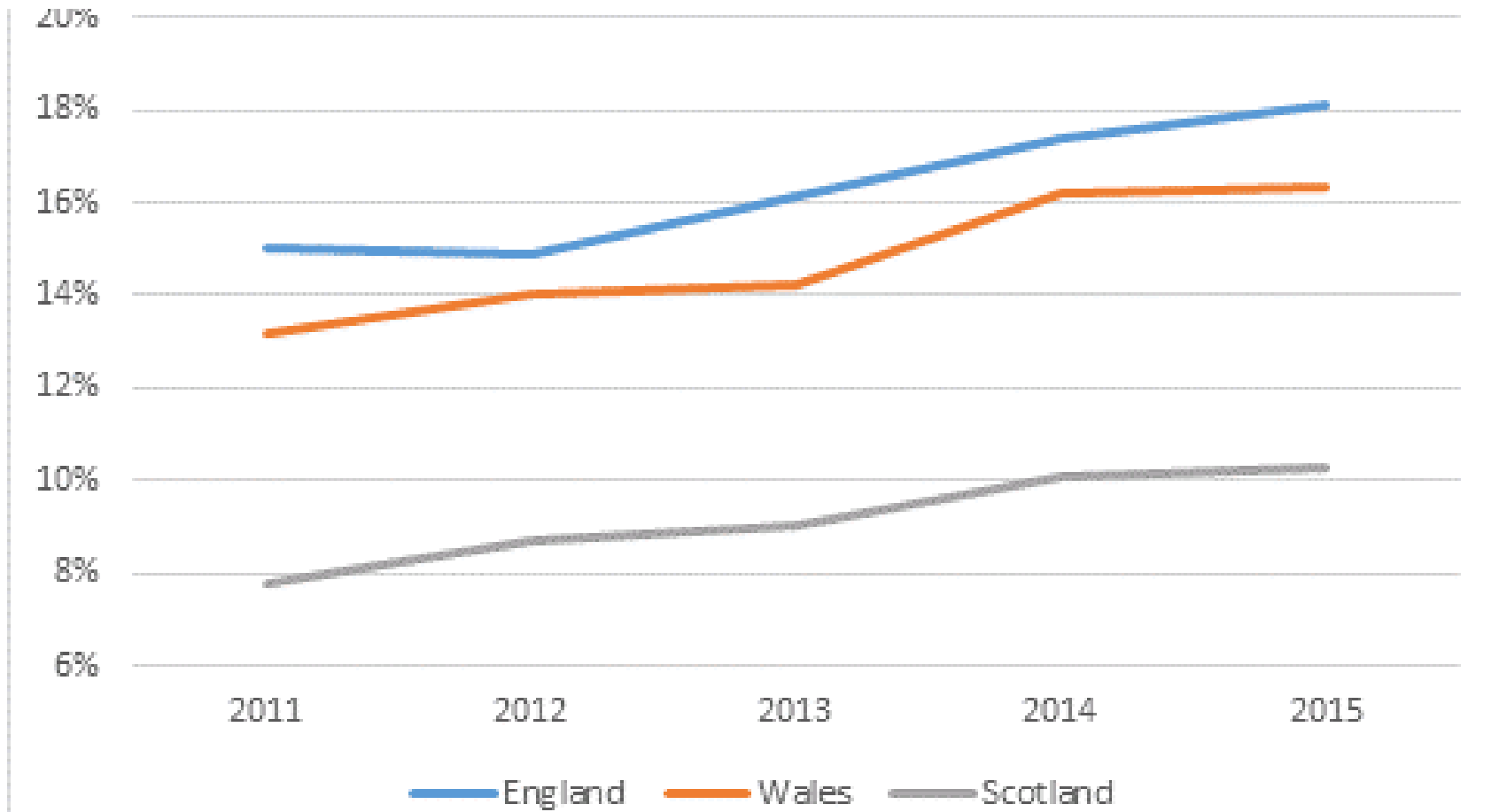
England: new students

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Growth in number of new students from quintile 1

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Lessons from Latin America

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Quintiles	Argentina	Brazil	Chile	Ecuador
Q1	18.0%	5.0%	21.2%	15.6%
Q2	25.3%	6.3%	26.4%	19.7%
Q3	29.5%	11.6%	26.0%	23.8%
Q4	38.2%	20.7%	37.5%	27.1%
Q5	56.6%	47.0%	61.6%	49.3%
Q5/Q1	3.1	9.4	2.9	3.2

Ecuador

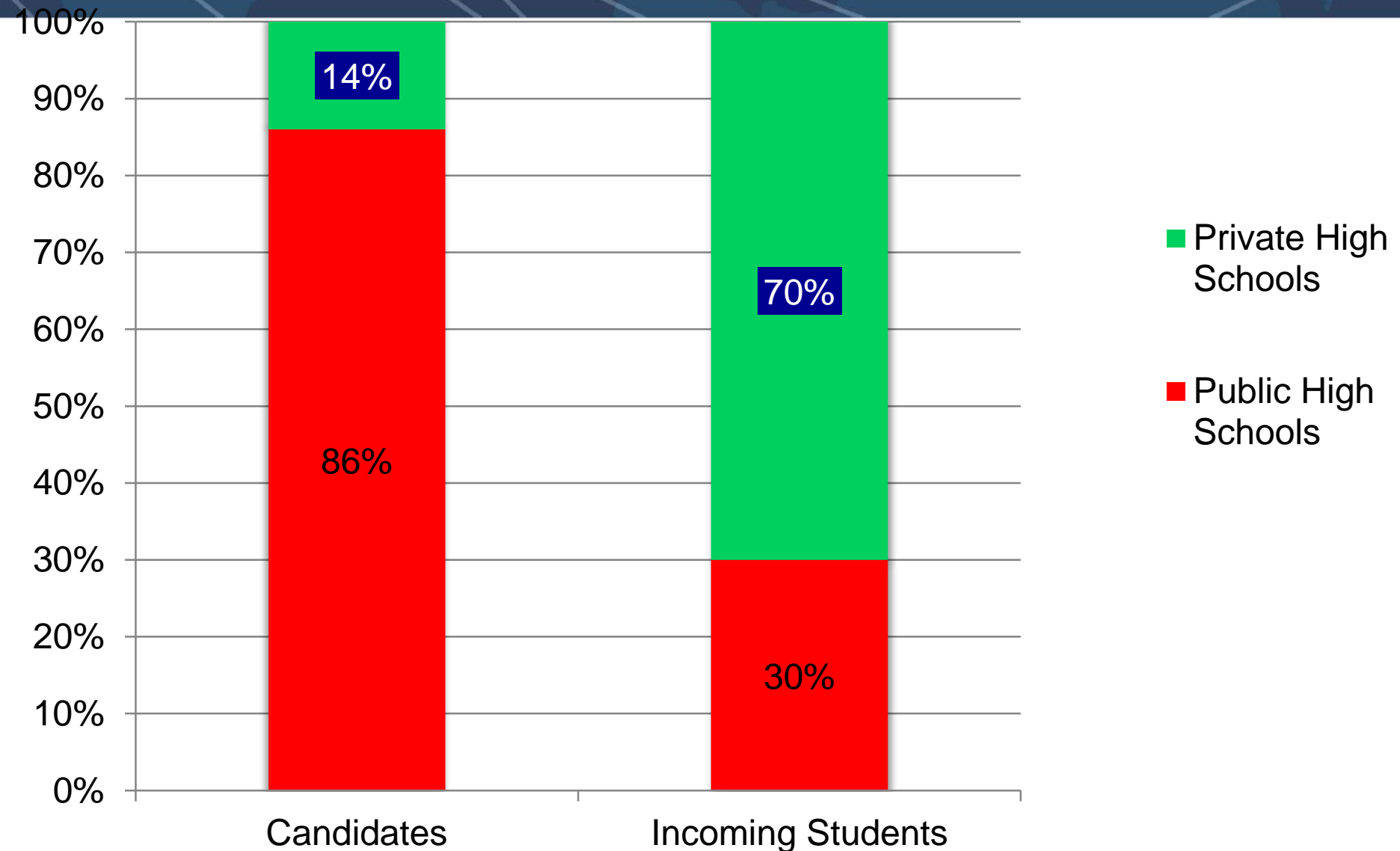
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- 800\$ per year on average
- Suppressed in 2007
- Inequality increases
 - Poorest: from 4 to 7%
 - Others: from 16 to 24%

U. of São Paulo

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If in some states of the (United States) higher education institutions are also "free", that only means in fact defraying the cost of education of the upper classes from the general tax receipts.

Karl Marx and Friedrich Engels, 1875



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Photo: Paul Saad, flickr



#Feesmustfall movements

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- “Free” tertiary education is generally not equitable
- Irresponsible governments
- Inability to focus on net cost to low-income students

Free Targeted Tuition

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- Free for lowest-income groups
- Financial aid for middle class
- Chile, South Africa, Italy, Japan, some US states, the Philippines

Approaches to Fees

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Impact	Financial Sustainability	Equity
Cost-Sharing Modality		
Free Higher Education for All	Very costly	Richer students more likely to benefit
Universal Fees	Less demanding on fiscal resources	Equitable if financial aid available
Fees only for Parallel Students	Less demanding on fiscal resources	Richer students more likely to benefit
Targeted Free Tuition	Costly	Potentially most equitable

Non-financial barriers

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- Non-financial barriers include inadequate information, motivation, academic preparation and social capital

Non-financial factors

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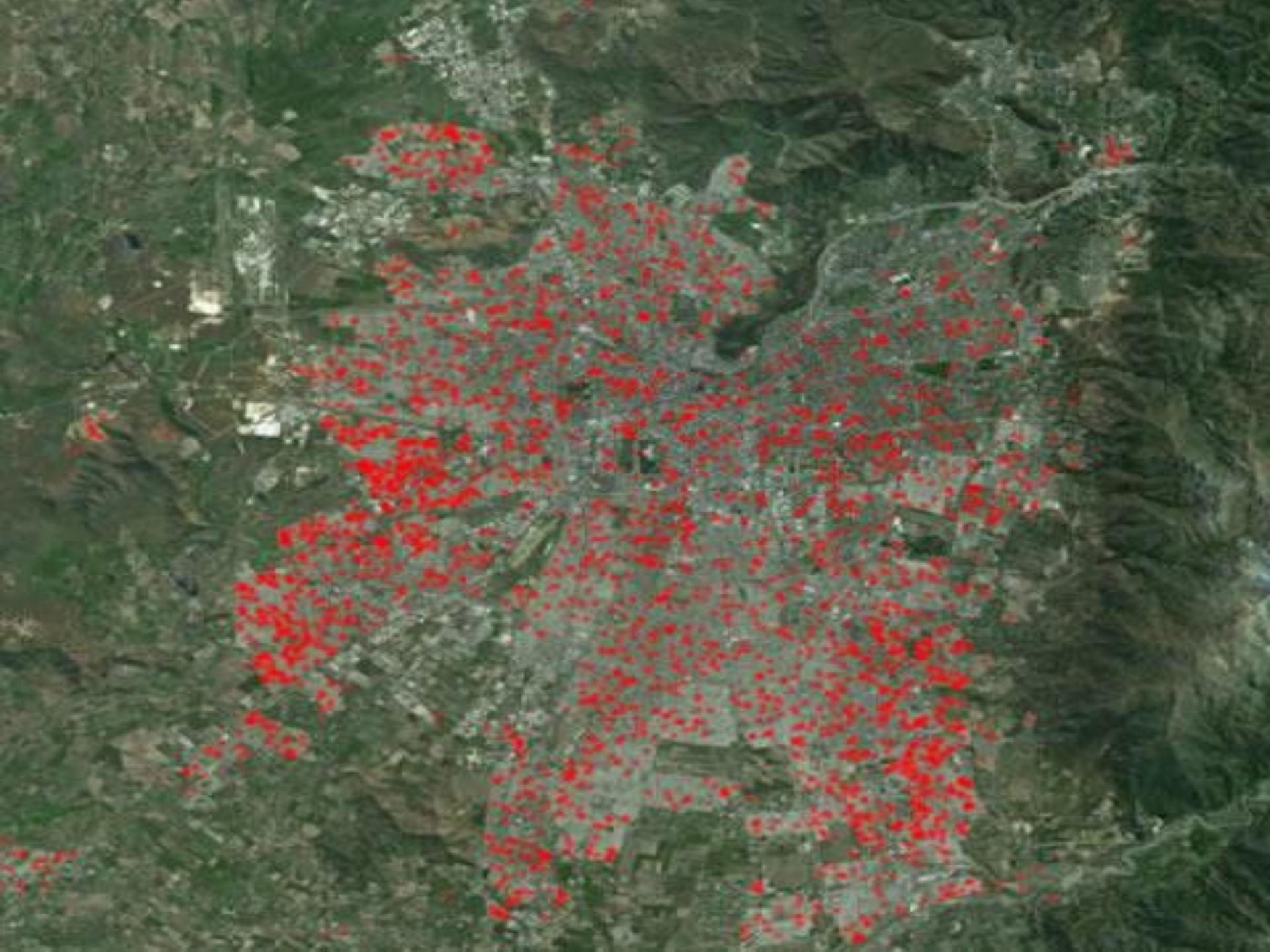
- Academic preparation

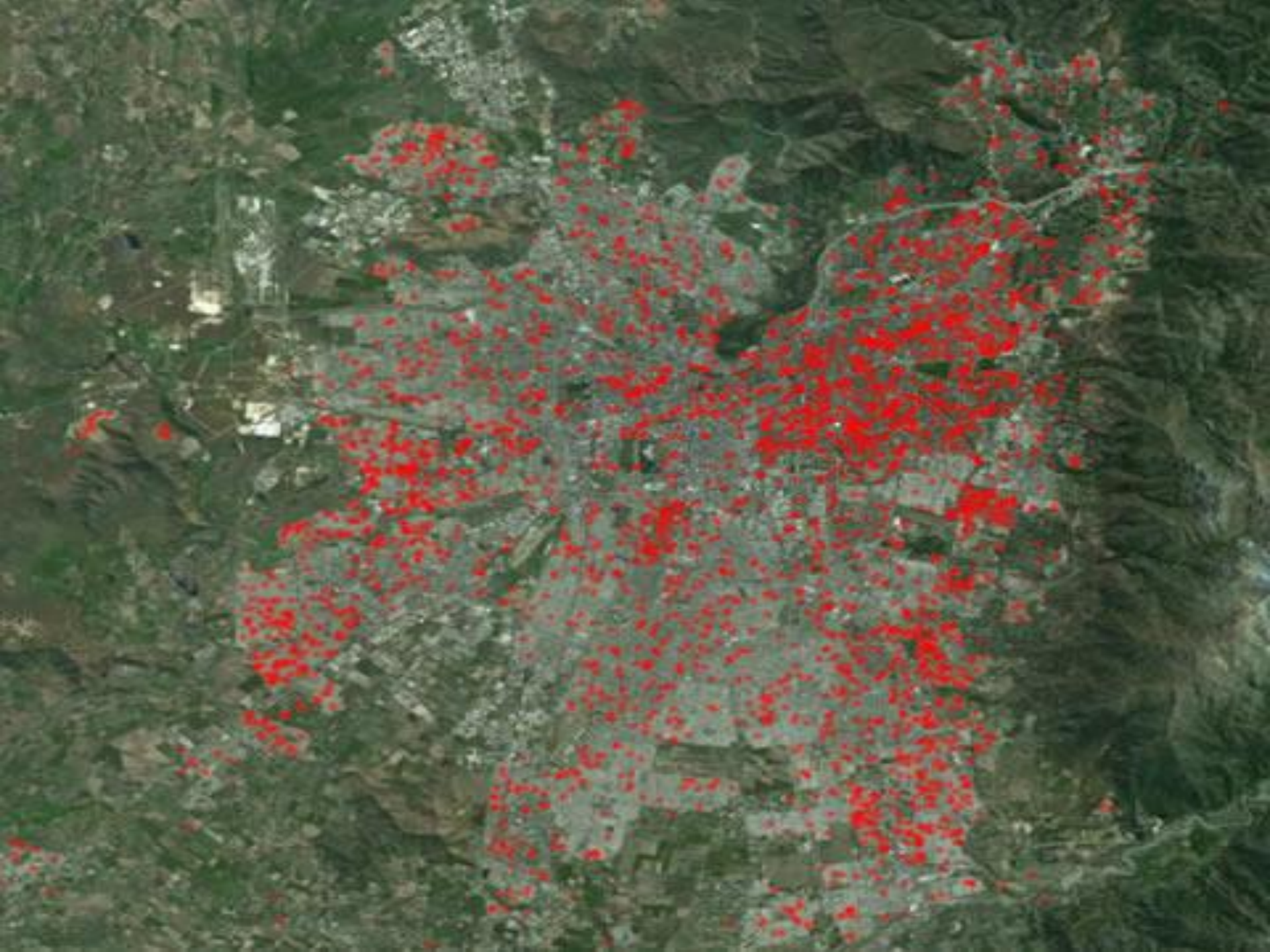
Fair is fair

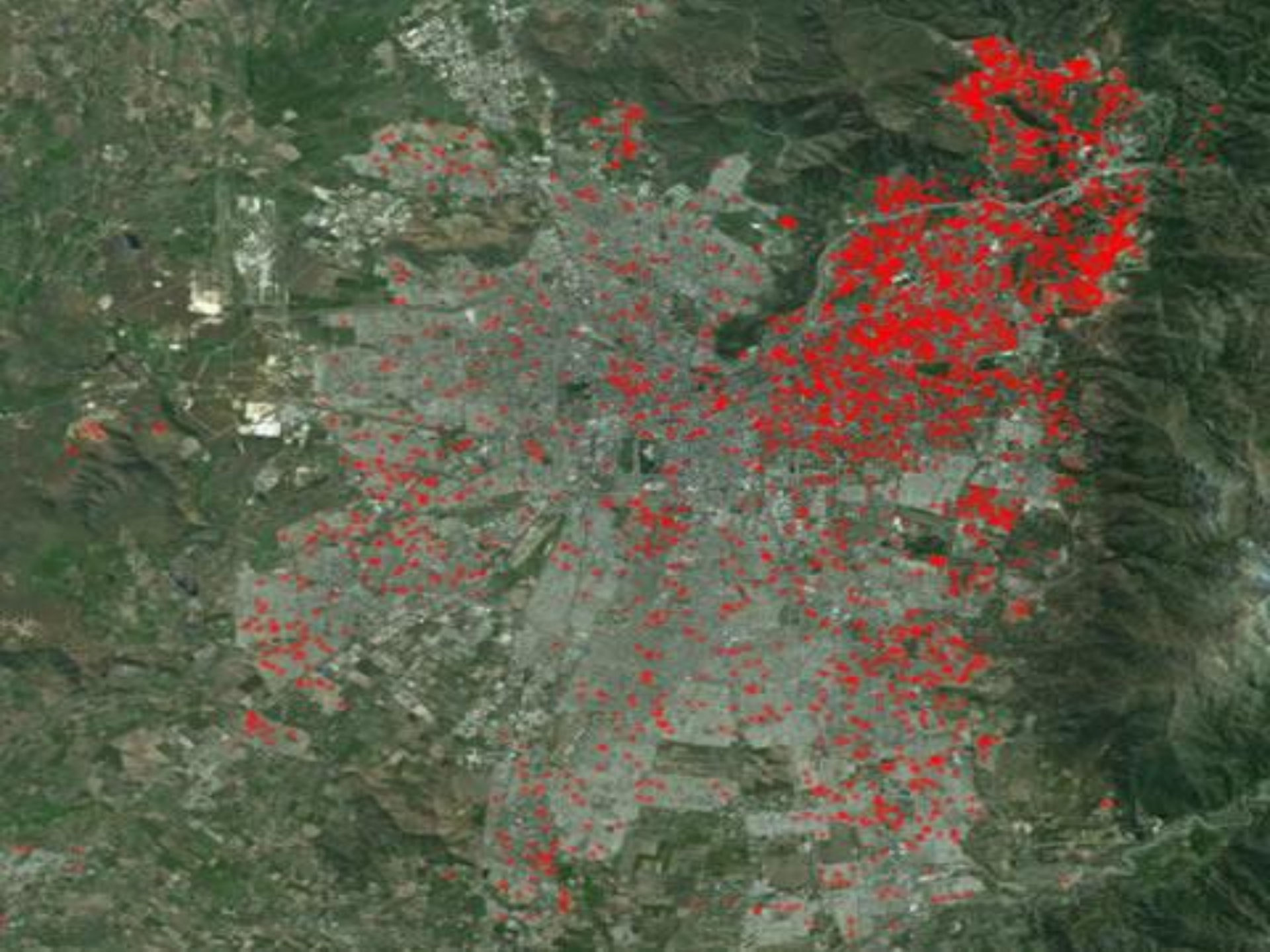
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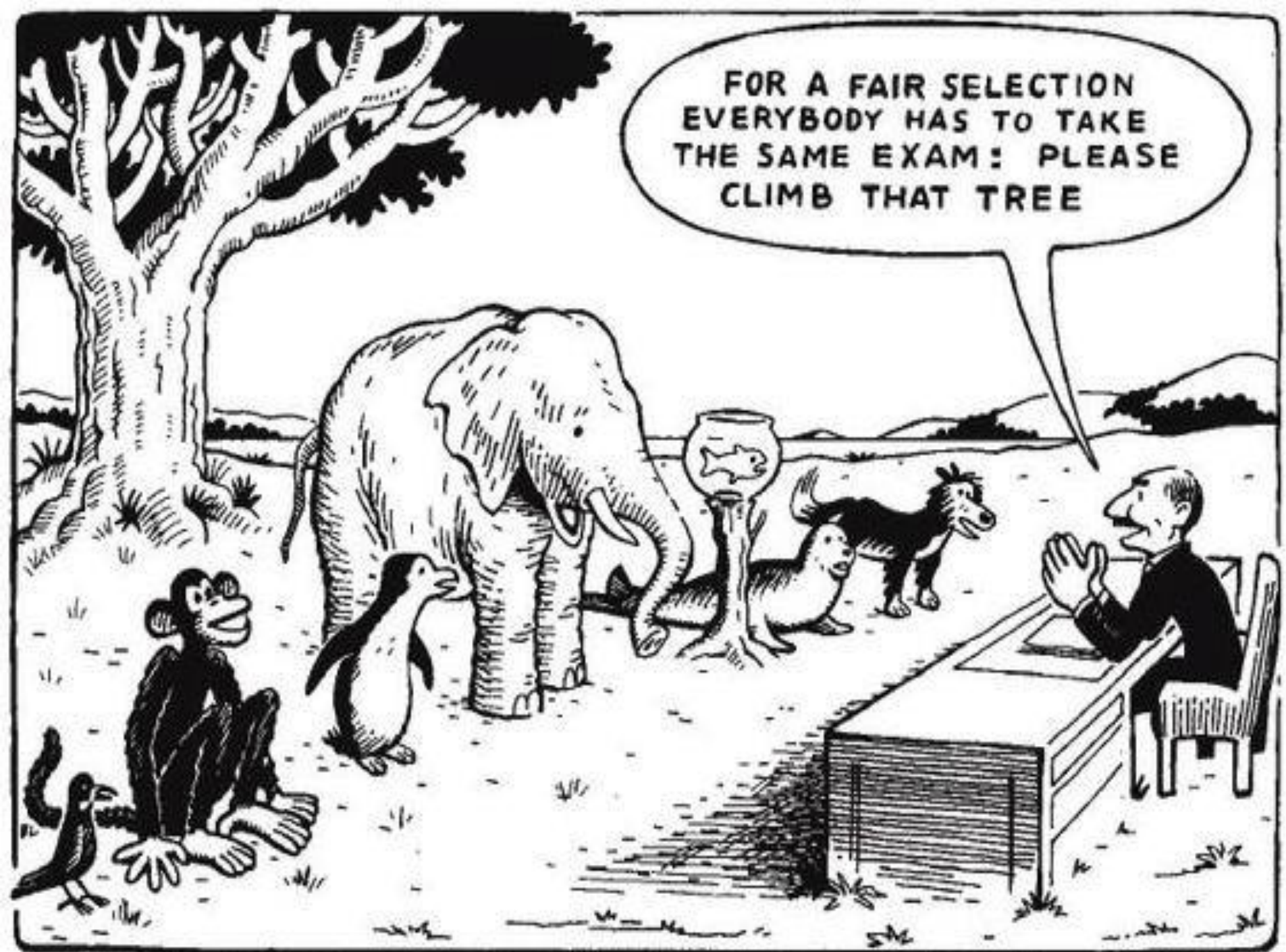
- Meritocratic entrance exam is the best guarantee of fair access
 - Transparent, objective way of selecting students
 - Elimination of corruption (former Soviet Union)







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THE SAME EXAM: PLEASE
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Non-financial factors

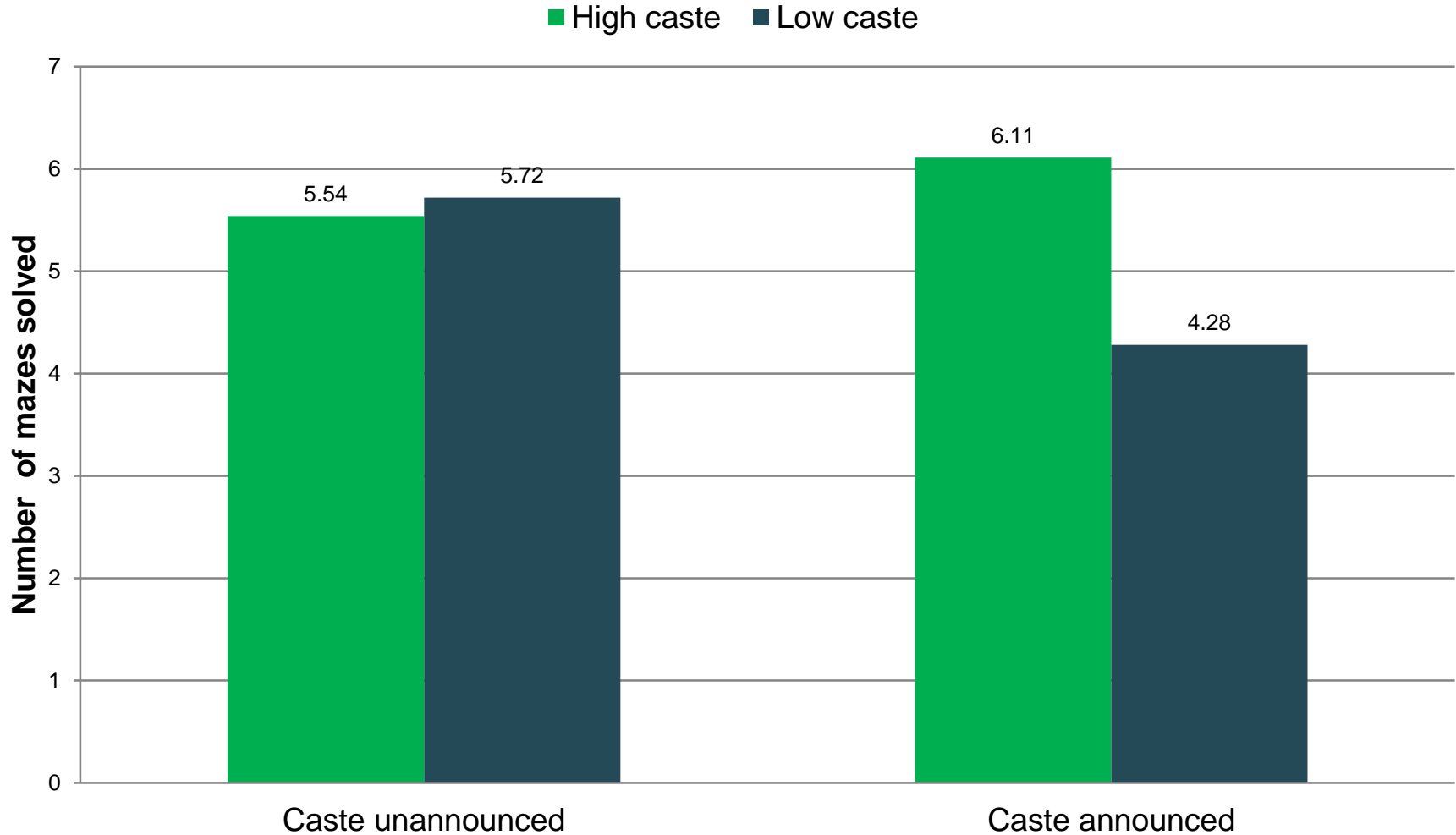
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- Academic preparation
- Motivation

Effects of caste identity on academic performance

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Non-financial factors

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- Academic Preparation
- Motivation
- Information

Virgin
MEGASTORE



McDonald's



NEWTON

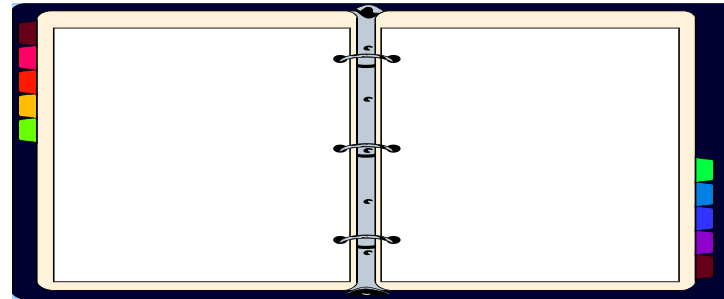
Newton Ford Managers Limited
"We have a single aim at Newton
to increase the real wealth of a
our clients."



IMPERIAL COLLEGE OF SCIENCE, TECHNOLOGY AND MEDICINE

Outline

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- Why equity matters
- Determinants of inequality
- **Equity promotion policies**

Equity promotion policies

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- National level
- Institutional level

Financial measures

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- Well-targeted and well-managed financial aid (scholarships and student loans) can be instrumental in reducing financial barriers to tertiary education

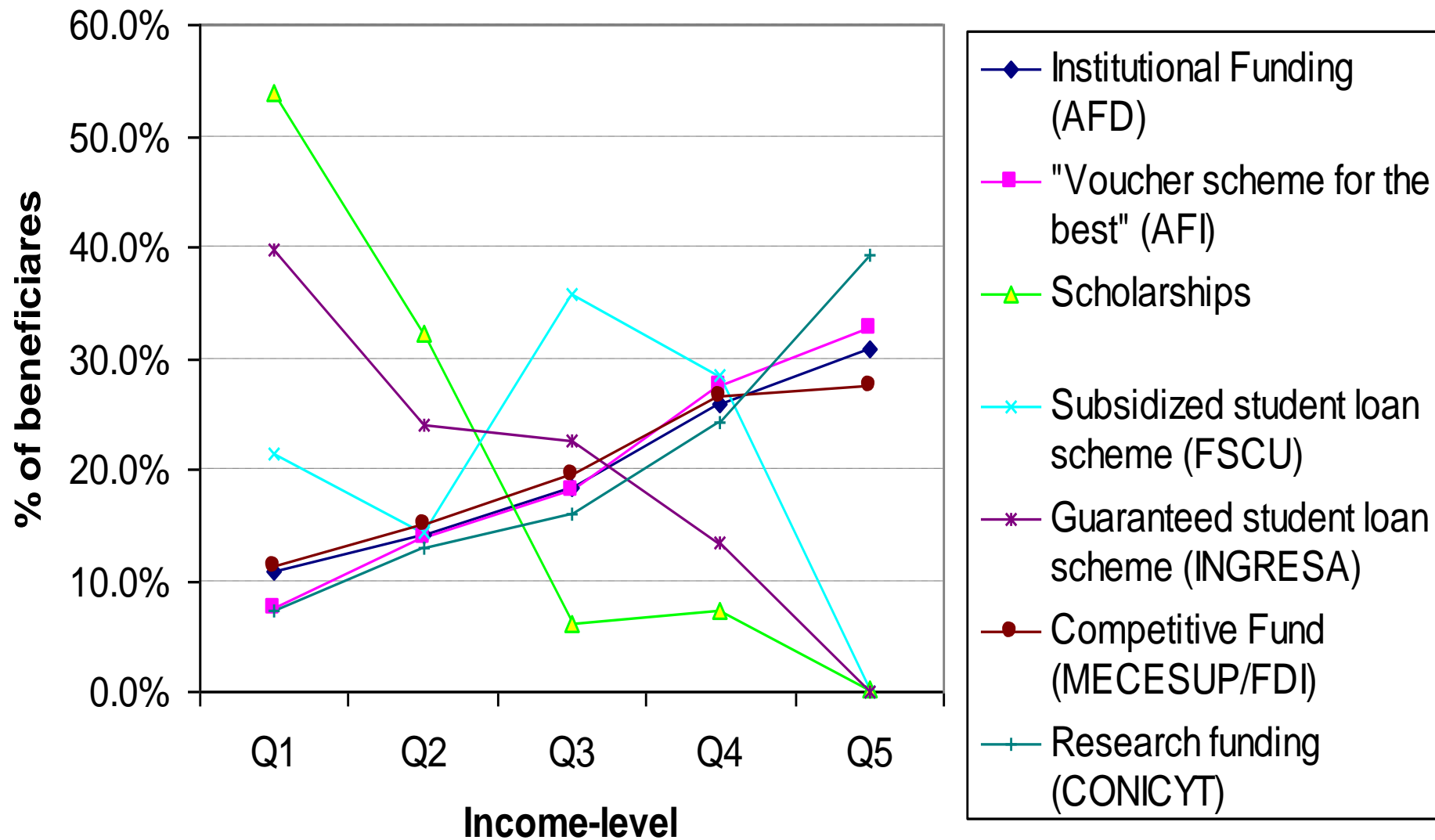
Financial aid

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- Need-based grants
 - Unconditional grants, work grants, tuition discounts
- Student loans
 - Mortgage types, income-contingent loans
- Must be well-targeted and well-administered

Benefits Incidence Analysis of Public Investment in Higher Education



Australia's ICL

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- Universal cost sharing
- No upfront payments
- Graduates pay a fixed % of income
 - through income tax system
- No repayment if income below threshold

Advantages

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- Equitable (ability to repay)
- Efficient (no default and low administrative costs)

Non-financial measures

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- Academic / career counseling
- Outreach / bridge programs to secondary schools
- Retention programs to improve completion rates
- Reformed selection procedures and/or preferential admission programs
- Special institutions and programs targeting underprivileged groups

Outreach / bridge programs to secondary schools

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- U of Almeria: “join us in your university” = outreach to children of immigrants in local high schools
- Victoria U’s Access and Success program

Science

You can't start young enough



Science is NOW AVAILABLE! Read
full-text news, research and more at
www.sciencemag.org



Retention programs

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- University of Texas (El Paso): Collaborative Program for Academic Excellence, to increase retention of progression of minority students
- Uniminuto (first-year vice-rector)
- Use of predicative analytics (big data)

Affirmative action

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- Less stringent admission criteria for minority students
 - USA, India, Brazil, France
 - Malaysia (large scale)
- Works best with academic monitoring and support









conclusion

It is not wrong to be different.



*It is wrong to be treated differently
if you are.*



Black



White



Gay



Straight



Religious



Atheist



You

¿Estuviste
demasiado
tiempo y te
quemaste?

Lo normal
9 meses,
y a ti,
¿Te sacaron
crudo?





Winners →
← **Losers**

Equality of opportunity

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The impertinent courtesy of an invitation offered to unwelcome guests, in the certainty that circumstances will prevent them from accepting.

Richard Tawney

EUROPEISKA UNIONEN
SVERIGE
PASS





ECONOMY CLASS

NAME		
FROM		
TO	shutterstock	
FLIGHT	DATE	TIME
GATE	BOARDING TIME	SEAT