SOCIAL EXCLUSION, CHILDREN, AND EDUCATION: CONCEPTUAL AND MEASUREMENT ISSUES

By:

Stephan Klasen
Department of Economics
University of Munich
Klasen@lrz.uni-muenchen.de

1. Introduction

1. Social exclusion has become one of the important themes in contemporary social policy debates in OECD countries. While there is a considerable debate about the precise meaning of the term (Evans, Paugham, and Prelis, 1995, Atkinson, 1998a, Klasen 1998), some of the most useful definitions have sought to emphasise that social exclusion is concerned with the 'inability to participate effectively in economic, social, and cultural life and, in some characteristics, alienation and distance from mainstream society (Duffy, 1995).' In contrast to poverty and unemployment which focus on individuals or households, social exclusion is primarily concerned with the relationship between the individual and society, and the dynamics of that relationship. In fact, in many ways, it appears useful to emphasise similarities between the debates about social exclusion and the debates about the barriers generated by disability. In the latter case, it is well recognised that some physical or mental disability can generate a powerful barrier to the ability to interact with society and that the state has some obligation to reduce or remove these barriers. In a similar vein, one can see social exclusion among non-disabled groups as socially generated barriers that reduce the ability of the excluded individuals to interact with society (see Klasen, 1998). Thus, as for the disabled, those excluded as the result of other barriers and disadvantages should also enjoy the support of the state to overcome the exclusion they face.

2. Room (1995) adds a new dimension to the discussion by couching the issue of social exclusion in a rights-based language when he talks about social exclusion as the 'denial or non-realisation of civil, political, and social rights of citizenship.' Such a rights-based approach to the problem of social exclusion has much to recommend. It has great affinity with the capability approach developed by Amartya Sen which calls for efforts to ensure that people have equal access to basic capabilities such as the ability to be healthy, well-fed, housed, integrated into the community, participate in community and public life, and enjoy social bases of self-respect (Sen, 1992; Sen, 1999).[1] The term social exclusion would then be seen as the denial of the latter three important capabilities. The advantages of the capability and rights-based approach to this issue are the following:

3. First, it emphasises that the inability to participate in, and be respected by, mainstream society is a violation of a basic right that should be open to all citizens (or residents).[2] In contrast to poverty, which is often seen as a 'social' or 'welfare' issue, the rights-language considerably strengthens the case for *society* to ensure that it enables participation and integration of all its members (Walker, 1997). As a result, there is less temptation to blame the excluded for their fate as is often the temptation in discussions about poverty and welfare.[3] Instead, it highlights the role of political, economic and social arrangements in generating exclusion and the role of solidarity among members in overcoming it (Townsend, 1997).[4]

4. Second, it does not demand uniformity of *outcomes*, but instead calls for equal *freedoms* for all to enjoy all aspects of citizenship. Thus it makes an important distinction between a choice of individuals to not participate in mainstream society, and their inability to do so. Conversely, social

[1] Adam Smith referred to this last issue as the ability to 'walk in public without shame', the failure of which he considered to be an important criteria of poverty. See also Atkinson (1998a).

[2] Citizenship itself can be a contested term and can become an exclusionary tool within a society. The refusal and or hurdles associated with granting citizenship to long-term residents of foreign origins (such as first, second and third generation foreign residents in Germany) can lead to forms of social exclusion of long-term residents who only enjoy partial citizenship rights (Mitchell and Russell, 1994). See discussion below.

[3] This does not, of course, mean that efforts to reduce social exclusion will not importantly depend on the efforts of excluded individuals to be 're-inserted'.

[4] For a more detailed discussion on the causes of social exclusion, see Klasen (1998).

exclusion should not be fought by ensuring (or even demanding) participation, but by merely making it available to everyone.

5. Third, it recognises the diversity of people in their ability to make use of opportunities. For example, participation in mainstream society may be seriously constrained for people with physical and mental disabilities, as it could for people who are otherwise disadvantaged by birth or background. Thus calling for equal capabilities (or the ability to exercise civil and social citizenship rights) may necessitate extra efforts by society to provide equal capabilities to such people. An equal starting point (or 'equal opportunities') may not be enough to ensure equal capabilities.[5]

6. Fourth, it focuses on *ends* and not on *means*. In this way, an important distinction can be drawn between a concern about income poverty and the concern about social exclusion. Money is one of several possible means for achieving inclusion in some aspects of social interactions. Social inclusion, however, is an end in itself as participation and respect are intrinsically valuable, while income is only instrumentally so. Nor is income poverty perfectly correlated with social exclusion. Lack of financial means is one causal factor generating social exclusion as it prevents poor people from having the financial means to achieve participation in society.[6] But income poverty is neither a necessary nor a sufficient condition for exclusion as non-poor may be excluded from participation and some poor may not necessarily be or feel excluded.[7]

7. While income poverty is only one possible (and neither necessary nor sufficient) factor causing social exclusion, persistent or recurrent unemployment can generate social exclusion directly as the involuntarily unemployed are excluded from the world of work, an important aspect of citizenship and participation. This way, unemployment is seen as an intrinsic problem, even if there are appropriate systems in place that ensure that unemployment does not lead to poverty (and, indirectly, to other forms of social exclusion, see Sen, 1999; Atkinson, 1998a, 1998b).

8. Using this capabilities or rights-based approach, it is again useful to draw parallels with the debates about disability. It is commonly recognised that the disabled should be able to enjoy all freedoms open to the non-disabled, even if this means preferential access to resources or treatment to the disabled. The Americans with Disabilities Act and similar efforts in other countries effectively try to enforce, to use Sen's language, equal capabilities for the disabled.[8] If the disadvantage is social, and not physical or mental, why should there not be equal efforts to ensure access to basic capabilities?[9]

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[5] This distinction was at the heart of a recent debate between Sen and Rawls about the focus on 'equal capabilities' or the focus on equal access to 'primary goods'. Sen argued that equal access to primary goods may not be enough for those who are disadvantaged by birth or background and may therefore need more to achieve the same capabilities (Sen, 1990).

[6] For example, the poor may, through the lack of access to transport and the location where they are forced to live be excluded from a range of important economic and social aspects of citizenship including the ability to participate in social and public life, as well as having equal access to cheap and high-quality products and services that are often not offered in low-income areas (Atkinson, 1998b).

[7] As discussed in Klasen (1998), even the non-poor may suffer from social exclusion if, for example, means-tested social transfers lead to poverty traps that heavily penalizes earnings and thus employment or stigmatizes and thereby exlcudes resipients. Also, income transfers may lift the poor to or above the poverty line without dealing with other factors that continue to exclude them (employment, location, access to services, etc). Conversely, some poor (esp. those who are temporarily in that state) may be able to maintain their inclusion throughout their spell of poverty.

[8] For example, Germany recently added disability in the non-discrimination clause of bill of rights section of the constitution.

[9] The Convention on the Rights of the Child also emphasizes that disabled children have the right to special support and effectively calls for equal capabilities. Article 23 states: 'States parties recognize that a mentally or physically disabled child should enjoy a full and decent life, in conditions which ensure dignity , promote self-reliance and facilitate the child's active participation in the community.' Interestingly enough, the language with respect to the disabled child is much stronger than with regard to children suffering from other disadvantages, suggesting that, in contrast to the approach taken here,

After all, one can argue with similar force that the social disadvantage is, just like physical and mental disabilities, beyond the control of those who are suffering from it, thereby giving them the right to redress.[10]

9. To make the definition of social exclusion as denial of the capability to participate in, and be respected by society more meaningful, it is important to narrow down the concept a bit further. In particular, it is useful to add a dynamic and a geographic dimension to the definition. Rather than, for example, calling every spell of unemployment a form of social exclusion, the term should be reserved to describe those who face persistent and long-term disadvantages in participating in the labour market and therefore in an important part of our social fabric. Similarly, social exclusion is a phenomenon more closely related to geographic than to individual factors. As many aspects of participation in society are dependent on proximity, mobility, and networks, location can foster social exclusion through a concentration of difficult socio-economic environments, and physical and social distance to mainstream society. Geography may not only limit access to resources for participation, but can also generate exclusion through so-called statistical discrimination.[11] For example, if residents of certain neighbourhoods are discriminated against in the labour market, the mortgage market, or the police, this form of discrimination worsens the exclusionary effects of geography. In these two senses, the debates about social exclusion in Europe bear some resemblance to the debate about the 'underclass' in the US (Wilson, 1987; Mincy, 1994), although there are also important differences in approach.[12]

10. Finally, one should point out that social exclusion is not a certain outcome of a particular constellation of circumstances. For example, being unemployed and living in a certain neighbourhood does not generate exclusion for everyone in that circumstance. Some may still be able to interact actively with, and be respected by the rest of society despite these adversities. Certain

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the Convention also implicitly makes the argument that there is a substantive difference between physical and mental, and socially generated disadvantages (UNICEF, 1989).

[10] Some may argue that social disadvantages and social exclusion may be partly due to the decisions and actions of the excluded which should therefore preclude their access to redress. Once again, the comparison with disability is instructive. Although one may argue that in some cases (particular in the cases of physical disability related to accidents caused by the person becoming disabled as a result) the disabled may have contributed to 'causing' their own hardship in more direct and obvious ways than a socially disadvantaged individual, it is commonly accepted that all disabled (regardless of whether they were involved in causing their disability) should have the same access to the special resources and support they need to achieve the same capabilities.

Moreover, one can take a more fundamental position such as the one proposed by Rawls (1973), where he argues that we all find ourselves with randomly allocated characteristics, talents, and motivations and do not 'deserve' our fortunes or misfortunes, be they physical, social, or intellectual.

[11] Statistical discrimination refers that employers or mortgage lenders have imperfect information about workers (and mortgage applicants) and therefore base their decisions about individuals on their assessment of the statistical information about the groups (e.g. race or location) the person is from. For example, if mortgage lenders believe that people from certain areas are less likely to service their mortgage, every individual from that area will face greater difficulty in obtaining a mortgage regardless of whether that individual is more or less likely to service his or her own particular mortgage. In extreme cases, employers and banks may 'redline' certain areas and refuse to do business with residents from those areas due to this statistical discrimination.

[12] In particular, the term 'underclass' has always carried some ambibuity regarding the responsibility of the members of the underclass for their fate (Mincy, 1994). Nor has the relation between the underclass and the rest of society been a major focus of these debates. Social exclusion, while not denying individual responsibility, is focusing on the process of exclusion from society and puts the relationship between individuals and society at the centre of investigations.

circumstances generate barriers to participation, thereby increasing the risk of exclusion. But none of these circumstances is certain to cause exclusion for everyone in this situation.[13]

11. Applying 'social exclusion' to children necessitates further considerations. Since children are citizens who are entitled to rights and capabilities in their own right, 'social exclusion' is an issue violating their rights and capabilities directly, which is recognised in the Convention of the Rights of the Child and national legislation governing the rights of children (UNICEF, 1989; BMFSFJ, 1998). At the same time, since children are growing to be adults, and decisions, choices, and opportunities in childhood will crucially affect their position as adults, the impact of their economic, social, educational, and psychological development on their status as adults will have to be examined as well. This issue which relates to the intrinsic and instrumental significance of the treatment of children will also be examined below.

2. Defining Social Exclusion among Children

12. Under which circumstances can one say that a child is suffering from social exclusion? Applying the capabilities approach by Sen, we can define social exclusion as the inability to participate in, and be recognised by, society. A slightly stronger version would also include the terms of such participation and recognition in the definition. In particular, one may want to include that participation in society, and recognition of people by society has to be on the terms of equality or equal opportunity. This would ensure equality inherent in the notion of citizenship and the protection of human dignity necessary for all social interactions.

13. Failure of the ability to participate in, and be recognised by society has not only theoretical appeal. Attitude surveys have determined that European citizens consider it a necessity of life. Using data from the Eurobarometer survey, Golding (1995) shows that 65% of EU citizens regard 'feeling recognised by society' an absolute necessity. Other indicators of participation are ranked very highly as well, which suggests that participation is indeed an important and valued capability that should be open to all citizens.[14]

14. One way to refine this capability failure would be to define more specific rights and capabilities that are necessary for the child to be able to interact equally in, and be recognised as an equal by, the rest of society. Berghman (1995) distinguishes between four types of integration and participation: civic integration relating to the democratic and legal system (and, for example, the legal status and treatment of children in general and minority, foreigner, or disabled children in particular), economic integration mainly related to employment, social related to the inclusion in the public safety net, and family and community integration relating to networks or, what some observers have recently termed 'social capital.'

15. A related starting point focusing specifically on children would be to consult the UNICEF Convention on the Rights of the Child which has been signed and ratified by the majority countries in the world. The rights that may be relevant to social inclusion and exclusion are the following:

1. Article 2: "States Parties shall respect and ensure the rights set forth in the present Convention to each child within their jurisdiction without discrimination of any kind, irrespective of the child's of his or her parent's or legal guardian's race, colour, sex,

[13] While this suggests that individuals are able to, and often do overcome these barriers, it is not justified to blame those that are unable to. After all, it is the barriers that are creating the problem, not the people failing to overcome them.

[14] The three others related to participation are the ability to 'go out with family and friends' (62% see that as a necessity), being 'useful to others' (70%) and having a 'social life' (42%). Unfortunately, a more direct question on the ability to participate in economic, social, and public life on equal terms was not asked in the survey (Golding, 1995).

language, religion, political or other opinion, national, ethnic or social origin, birth, property, disability, birth or other status....“

2. Article 3: “In all actions concerning children (...), the best interests of the child shall be a primary consideration...“

3. Article 7: “The child shall be registered immediately after birth and shall have the right from birth to a name, the right to acquire a nationality, and, as far as possible, the right to know and be cared for by his or her parents.“

4. Article 9: “States Parties shall ensure that a child shall not be separated from his or her parents against their will (...)“

5. Article 17: “States Parties (...) shall ensure that the child has access to information and material from a diversity of national and international sources, especially those aimed at the promotion of his or her social, spiritual, and moral well-being (..)“

6. Article 23: “States Parties recognise that a mentally or physically disabled child should enjoy a full and decent life in conditions which ensure dignity, promote self-reliance and facilitate the child’s active participation in the community. States Parties recognise the right of the disabled child to special care (...)“

7. Article 27: “States Parties recognise the right of every child to a standard of living adequate for the child’s physical, mental, spiritual, moral, and social development. (...) States Parties (...) are to assist parents to implement this right (...)“

8. Article 28: States Parties recognise the right of the child to education (...) and on the basis of equal opportunity shall, in particular make primary education compulsory and available free to all; encourage the development of different forms of secondary education (...), make them available and accessible to every child, and take appropriate measures such as the introduction of free education and offering financial assistance in case of need; (...) take measures to encourage regular attendance at schools and the reduction of drop-out rates; (...).“

9. Article 29: “States Parties agree that the education of the child shall be directed to the development of child’s personality, talents, and mental and physical abilities to their fullest potential (...); the preparation of the child for responsible life in a free society, in the spirit of understanding, peace, tolerance, equality of sexes, and friendship among all peoples, ethnic, national, and religious groups and persons of indigenous origin.“

10. Article 30: “(...) A child belonging to a minority or who is indigenous shall not be denied the right, in community with other members of his or her group, to enjoy his or her own culture, to profess and practise his or her own religion, or to use his or her own language.“

11. Article 31: “States Parties recognise the right of the child to rest and leisure, to engage in play and recreation (...); States Parties shall respect and promote the right of the child to participate fully in cultural and artistic life and shall encourage the provision of appropriate and equal opportunities for cultural, recreational, and leisure activities.“

16. Failure in meeting any of these rights, for whatever reasons, could then be seen as evidence of social exclusion, as all of these rights deal with the ability of the child to interact with society on equal terms.[15] The advantage of basing discussions of social exclusion and children on the

[15] Not all of the Articles in the convention are stated in ways that make them legally enforceable claims, and the Convention as a whole is only enforceable in most countries if it has been translated into appropriate

Convention is the public and political acceptance the Convention has gained through its signatories, ratification, and monitoring processes that have accompanied it.

17. One should point out, however, that the Convention of the Rights of the Child is not in all cases consistently following a capabilities approach as suggested by Sen. In particular, in some parts of the Convention, it merely calls for equal opportunities and non-discrimination, which may be interpreted as less than calling for equal capabilities.[16]

18. Also, it singles out physically and mentally disabled children as having rights to special support to achieve a full and decent life in dignity and self-reliance and with active participation of the community (Article 23). Children who are not disabled but otherwise disadvantaged by birth, background, or circumstance are not specifically mentioned and all children are not specifically granted the right to a full or decent life and active participation in the community. As argued above, it is unclear why non-disabled disadvantaged children (or, for that matter, all children) should not enjoy these same rights.[17]

19. The mentioned clauses of the right of the child deal with a variety of aspects of children's lives. Many of the mentioned clauses relate to legal rights of inclusion (nationality, non-discrimination, growing up with parents, access to media and respect for own culture and language etc.) and can generally be met through appropriately passed and enforced legislation. Others, particularly Articles 23, 27, 28, 30, and 31 deal with the interaction of economic and social forces and governmental action where governments are asked to correct exclusion that may otherwise be created as a result of economic or social forces (see also Klasen, 1998).

20. Such a capabilities or rights-based approach to child development differs sharply from a utilitarian concern of maximising wealth or consumption. Article 29 about the goals of education highlights this contrast. While a utilitarian approach to education would promote education in ways that raise the sum total of achievement in the education system and thus would target resources on those best placed to make use of them, this rights-based approach calls for maximising the potential of each child, regardless of whether this will or won't further growth, technological development, or the position of the country in the global marketplace. Thus the focus of educational policies and other policies, if they are to deal with social exclusion, has to deal with the capabilities of those most disadvantaged rather than those who are able to use the system most effectively. Thus a focus of educational policies aimed to combat social exclusion will have to focus heavily on the distribution of access and achievements, rather than averages.[18]

3. Intrinsic and Instrumental Issues

21. The rights or capabilities based approach used above in defining social exclusion carries with it a focus on the *intrinsic* problems associated with social exclusion. If social exclusion is a violation

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national legislation. This paper is not concerned with this aspect and just uses the Convention to highlight areas where the spirit of the Articles are not adhered to.

[16] For example, equal opportunities in access to leisure activities could be interpreted as merely providing for non-discrimination of access. Equal capabilities would, in addition, also call for efforts to ensure that all groups of the population effectively feel able to participate and may necessitate specific interventions to open such facilities to children with particular disadvantages.

[17] The special concern about physically and mentally disabled children is understandable in view of the fact that disabled children still face many barriers in developing and developed countries. At the same time, there are good reasons to extend this concern to non-disabled children who are otherwise disadvantaged.

[18] This does, of course, not mean that educational policies should be geared exclusively towards meeting these rights. It merely means that, in an assessment of the benefits and costs of alternative educational policies, these rights are and should be an important consideration.

of rights or capabilities, it immediately implies that a society that tolerates social exclusion is *intrinsically* deficient as it fails to grant basic rights or capabilities to its citizens, in this case to its children. The use of the Convention on the Rights of the Child, signed and ratified and thus accepted by the majority of the world, nicely illustrates this intrinsic importance.

22. At the same time, there are several types of *instrumental* reasons why the treatment of children should receive close scrutiny. First, socially excluded children may grow up to be adults that are similarly suffering from social exclusion about which we should worry for intrinsic reasons. Thus combating social exclusion among children can help combat social exclusion as adults.

23. Second, socially excluded children may, as a result of their exclusion, suffer from deficiencies in other important capabilities, such as the ability to be healthy, well-educated, well-housed, or well-nourished. This clearly reduces well-being of those suffering from it, but may also have larger societal implications (e.g. due to the positive externalities of health and education). In addition, social exclusion may have close empirical relations to other social problems that threaten the stability and prosperity of society at large such as crime, violence, social pathologies, societal divisions, racism, xenophobia, etc.

24. Third, there is the additional worry that socially excluded children will pose a threat to the future well-being of society as they may become a social and economic burden to society or, worse, generate considerable social disruptions if they have little stake in the existing order. In addition, to the extent that social exclusion is transmitted intergenerationally, social exclusion of children may create ever deeper divisions within society that amplify across generations.

25. Fourth, there may even be situations where one cannot speak of social exclusion among children, but nevertheless the particular situation some children find themselves in will help promote social exclusion among adults. For example, one can think of educational arrangements where children with learning difficulties or other disadvantages are well-integrated and do not suffer from social exclusion, but their needs are insufficiently taken into account and leave them poorly catered for as a result.

26. It is important to point out that the intrinsic and instrumental reasons to be concerned about social exclusion have a very different moral standing. While the intrinsic arguments against social exclusion rise and fall with the acceptance of their philosophical basis (such as a capability-based or other rights-based approach), the instrumental considerations rise and fall with the veracity of the linkages postulated, which is largely an empirical question. This has important implications for a research agenda on social exclusion. A research agenda focused on testing the linkages between exclusion and other desirable welfare criteria implicitly accepts the instrumental approach; one that accepts the intrinsic arguments, such as the rights or capabilities approach suggested above can immediately move to policy questions related to social exclusion.[19] In practise, even an approach highlighting the intrinsic problems associated with social exclusion should also be interested in the instrumental issues. After all, if social exclusion causes other social ills, which themselves are intrinsically problematic, this should add to the worry of those who worry about social exclusion for intrinsic reasons.

4. Social Exclusion and Education

27. Education is one of the most important factors affecting the development of children. It has great intrinsic significance as access to education is an important right (see Article 28 of the

[19] At the same time, establishing the empirical linkages may be very important to generate societal consensus around policies combating social exclusion, particularly if it can be shown that social exclusion hurts everyone and not just those suffering from it. The complete reliance on this approach is quite tricky as it may get bogged down in empirical issues rather than focus on important policy-questions.

Convention), and *being* educated is an important and very valuable capability. In addition, *getting* educated is an important participatory process for children and equal access for all to this process allows participation in, and respect by society. In fact, many of the early calls for mass education in the 18th and 19th centuries viewed the inclusionary nature of the education process, and the fostering of citizenship through education as more important than the skills one may acquire through education (Rothschild, 1998).

28. Conversely, education can be a source of exclusion for children and thus carry with it the intrinsic problems this involves. This is particularly the case if, for some children, it fails to meet the standard called for in the Convention of the Rights of Children of 'development of the child's personality, talents, and mental and physical abilities to their fullest potential.' It can also be exclusionary if the *process* of education fails to promote equal participation and access.

29. In addition, educational policies can (instrumentally) promote (or fail to stem) social exclusion as adults. This can happen through educational policies that promote social exclusion among children which then translates to social exclusion as adults, or policies that are not necessarily exclusionary but fail to prepare some disadvantaged children adequately to be well-integrated in the economic and social life of adult society. Examples of these issues will be highlighted below.

5. Signs and Forms of Social Exclusion and Education in OECD Countries

30. Current educational policy debates are very much concerned with the need to raise standards of educational achievements in OECD countries. Propelled by cross-country tests of educational performance, the focus for many policy-makers has become to move up (or at least not to fall) in the international 'league tables' of educational performance (IEA, 1991; 1994-95; OECD, 1997). Sometimes, there is particular emphasis placed on improving the top end of the educational distribution.

31. The main forces behind this focus on average educational achievement and the achievements at the top end of the spectrum are the growing competitive pressures in the marketplace which place an ever-greater premium on skills, the drive to promote technological progress and international technological leadership through excellence in education, and new insights from the economic growth literature, particularly so-called endogenous growth models, where human capital is the one critical factor enabling continuous growth of per-capita incomes (Barro and Xala-i-Martin, 1995).

32. Raising average performance and promoting top performance often leads to policies that further the segmentation of the student population to ensure that the best performers receive the support they need and that below average performers do not 'drag down' the rest of the student population. In some cases, such as the recent policy to publish league tables in the UK to 'name and shame' poorly performing schools, it generates incentives to permanently exclude poorly performing students who drag down the average performance of the school through their own low performance and the effects they may have on others (Smith et al. 1997, see also Klasen, 1998).

33. Educational policies focused on preventing social exclusion will have to take a radically different tack. Instead of the *average* or *top* performance of a school or an educational system, the *distribution* of educational performance will now assume a much greater importance. In particular, the distance of the poorest performers to the average will now be of particular relevance, both for intrinsic and instrumental considerations.

34. Similarly, the *structure* of the educational system, rather than simply its 'output', will assume much greater importance. For example, if poorly performing students and students with learning disabilities are taught in a separate school system, then this will matter for questions regarding social exclusion, regardless of the 'output' of such a separate system. Similarly, the structure of support to disadvantaged students will be an important factor. Stigmatising evaluation and

support structures to the disadvantaged may either reduce the take-up of the opportunities of special support and thus foster exclusion or lead to stigmas and exclusion for those who actually take up these services.

35. Third, the *dynamics* of the educational system will be of great importance. In particular, the ability of individuals to move between systems, particularly for those at the bottom end of the educational distribution, will be a very relevant concern.

36. Fourth, the *output* of the educational system will have to be considered in much broader terms. Rather than simply examining the private returns to education, a focus on social exclusion will have to ask questions about whether the educational systempromotes or hinders integration and social cohesion, whether it equips the students with the opportunities and abilities of actively participating citizens, and whether it fosters tolerance and respect for diversity (see Article 29 on the Convention of the Rights of the Child).

37. This discussion should provide us with a road map to determine the extent to which education promotes or hinders social exclusion. It may be useful to split the discussion into two aspects, the first being education and social exclusion among children, and the second, education and social exclusion among adults.

6. Social Exclusion and Education among Children in OECD Countries

38. Social exclusion among children is, in a first instance, linked to social exclusion and economic opportunities among the family or household the children grow up in. There is a large literature now on the intergenerational transmission of poverty, and much of the literature on an 'underclass' links poverty and exclusion among children to the economic and social situation of parents (e.g. Wilson, 1987; Hills, 1998, Machin, 1998; Mincy, 1994). Atkinson (1998a, b) and others (e.g. Walker, 1997) have emphasised that recent economic trends, in particular the developments in the labour market for less-skilled individuals, the privatisation of utilities and transport companies, the changes in retailing and the housing market, practises by banks and insurance companies have created ever closer linkages between poverty and social exclusion, where the poor are facing ever greater barriers (and/or greater costs) of meeting their consumption needs and interacting with the rest of society.

39. The question now becomes to what extent the education system supports or hinders this type of exclusion among children. Educational policies can be exclusionary in a variety of ways. One is if education largely draws on the local population and the school resources are dependent on the local tax base. For poor children living in a poor district, the exclusion associated with their poverty can be exacerbated by the educational system that underperforms in contrast to the rest of the country.[20] The US is a typical example of such a situation.

40. Greater school choice has been seen by many as the solution to this problem as the poor and excluded would be able to get access to better quality schools (and possibly even private sector schools through vouchers or assisted placement schemes). While greater school choice can, in theory, generate pressures to improve the quality of schools, especially poorly performing ones, such policies can also have exclusionary effects. First, Murnane (1994) and Manski (1994) and have shown that

[20] There is a large literature on poor schooling outcomes in poor areas. There is, however, considerable controversy to what extent school resources, rather than teacher quality or neighbourhood effects are to blame. The recent consensus appears to be that resources do matter to some degree, though neighbourhood effects are also very strong. See, for example, Hanushek, Kain, and Rivkin, 1998a; Card and Payne, 1998; and Card and Krueger, 1998.

voucher systems available to all will not succeed in equalising access to quality education.[21] Second, in environments of imperfect information and uncertainty, it is not clear that students from poorer backgrounds will benefit much from choice (and may actually be hurt by it). Third, greater choice can, under some circumstances enhance the segregation of students according to ability and socio-economic background and thereby reduce the educational output of the poorly performing schools and reduce the inclusionary nature of the educational process (Manski, 1994).[22] Smith et al. (1997) similarly argue that promoting school choice has not achieved markedly greater access to education for children from disadvantaged backgrounds in the UK.

41. Second, to the extent that some promising students from disadvantaged economic backgrounds benefit from such schemes, many children from disadvantaged backgrounds who lack that educational promise do not benefit and may end up more excluded in the neighbourhood schools as the more promising students have left (Wilson, 1987; Manski, 1994).

42. Apart from the linkage between economic disadvantage translating into educational disadvantage and exclusion, the education system can foster social exclusion in other ways. One potential source of exclusion is the way it deals with students with special needs. As shown in OECD (1998), there are significant differences in the definition and treatment of children with special needs. While all countries are aiming to progressively integrate children with special needs, in some countries, including the Czech Republic, Hungary, and Switzerland, physically and mentally disabled children as well as children with learning difficulties are still largely taught in separate school systems (OECD, 1998). Since there typically is very little upward mobility out of such school systems into the regular education, being placed in such a separate school system can become a form of social exclusion.[23] It can compound other forms of exclusion. For example, in Germany children of foreign residents are heavily overrepresented among students in schools for children with special needs ('Sonderschulen') which creates further barriers to their integration (Statistisches Bundesamt, 1998).[24]

43. More generally, the existence of a differentiated school system can be a source of social exclusion, particularly if the system works largely on a hierarchical basis forcing the students with least educational promise into a lower tier school system that can become exclusionary in its own right, apart from the impact on educational achievement it may have. The systems of German-speaking Central European countries typically fit this description as differentiation is based largely on academic ability (rather than special interests and skills), upward mobility between the systems is very low (while downward mobility is considerable), and the educational environment in the lowest tier of the system is comparatively poor (BMFSFJ, 1998). The differentiation itself can lead not only to poorer education in the bottom tier, but also to a less inclusionary educational process as children in the lower tier may feel less valued by society (BMFSFJ, 1998).

[21] Voucher systems that give considerablly larger vouchers to people from disadvantaged backgrounds are, in theory, able to deal with this problem. In practise, they have never been implemented (Murnane, 1994)

[22] This is particularly the case if the composition of the student body affects outcomes of each individual through external effects as is commonly believed to be the case (i.e. that the presence of high performing students raises the educational output of all students).

[23] The way students with special needs are catererd for in the educational system differs greatly between countries and has not been thoroughly examined. There are also only few studies on the effects of various approaches to students with physical, mental, and learning disabilities. Hanushek, Kain, and Rivkin (1998b) examine the impact of special education programs on achievement of beneficiaries in the US (which are supplementary to mainstreamed general instruction) and find that they raise achievement of the beneficiaries and that mainstreaming special education students does not detract from the performance of the other students in the classroom.

[24] The overrepresentation of foreigners has also contributed to the small increase in the share of students educated in 'Sonderschulen' (from 3.8% in 1986 to 4% in 1996, Statistisches Bundesamt 1998).

44. But even within integrated schooling environments education can become exclusionary for some students. For example, heavy reliance on within-school differentiation and stigmatising processes for identifying and supporting students at risk of failure or with special educational needs, or heavy use of grade repeating as a measure to separate students of different abilities can foster social exclusion of children (OECD, 1998b; BMFSFJ, 1998).[25]

45. A new form of social exclusion has recently emerged as competition between schools has been emphasized. In a drive to raise average standards of schools through the publication of league tables of academic performance of schools, as practised in the UK since the mid-1990s, the incentives to decline admission or subsequently exclude students with poor educational or social performance has become very great. Smith et al. (1997) demonstrate that such policies have resulted in the permanent exclusion of 13500 students in the 1995/96 school year in England, the largest number ever. In many ways, this is the starkest form of social exclusion practised by the educational system as these excluded students can have no alternative system that effectively caters for their specific needs. It clearly goes against the spirit of Article 29 of the Convention of the Rights of the Child which calls for the education to achieve the development of their fullest potential.

46. Finally, the education system can be a source of exclusion if it fails to adequately educate a portion of its students. Drop-out of the school system without a degree are a good measure of the performance of the school system. Students who drop out without completing a degree or diploma are therefore excluded from the intrinsic and instrumental benefits offered by successful graduation from the secondary school system. The table below shows three related measures of drop-out for OECD countries. The first two refer to the share of the population not in school at the final age of legal compulsory schooling and at age 17, respectively, and the other is the ratio of students failing to graduate divided by the population of graduating age. A considerable share of students are not enrolled in school at the final leaving age, and even more do not actually graduate from the secondary school system. The situation appears worse in the poorer OECD countries (Turkey, Spain, Hungary, but also some rich countries fail to graduate a significant share of their student population (US, UK, France). While the general trend has been towards higher graduation rates (OECD, 1998b), in some countries, including Germany, progress has slowed considerably in the 1990s, where the proportion of school leavers without a degree from the lowest tier of the educational system has stubbornly remained at above 12% in the 1990s (Statistisches Bundesamt, 1998).

[25] OECD (1998b) also argues that grade repeating is not effective in supporting students with lower educational abilities or greater needs which makes reliance on this practise even more questionable.

Table 1: Drop-Out and Failing Students in OECD Countries

	Measure 1	Measure 2	Measure 3
Australia	1,9	6,5	26,7
Austria	12,3	12,3	
Belgium	12,5	0,0	23,9
Canada	6,0	20,9	31,6
Czech Republic	1,3	28,3	2,9
Denmark	6,2	18,3	17,8
Finland	7,4	9,5	7,2
France	3,9	7,4	21,8
Germany	15,7	6,4	7,4
Greece	11,4	44,2	15,7
Hungary	11,8	28,9	24,2
Ireland	4,4	19,1	14,4
Japan	0,0	5,6	7,8
Korea	1,4	10,4	
Luxembourg	20,1	22,3	
Mexico	48,0	63	
Netherlands	17,5	6,7	10,4
New Zealand	0,1	23,2	33,6
Norway	5,0	9,7	4,4
Portugal	10,7	27,2	
Spain	17,3	25,2	36,9
Sweden	3,0	4,2	17,0
Switzerland	2,5	16,5	17,4
Turkey	44,3	74,3	70,8
UK	13,1	25,3	19,8
US	21,4	21,4	24,3

Measure 1: Proportion of age group not enrolled in educational institution at final school leaving age
Measure 2: Proportion of age group not enrolled in educational institution at age 17.
Measure 3: Proportion of graduates from first educational programme to population at theoretical age of graduation.
Source: OECD (1997b, Measure 3: OECD, 1995).

47. Apart from failing to graduate a significant share of its student populations, drop-out or failure to graduate is, not surprisingly, associated with poorer academic performance. It is interesting to note, however, that some school systems, including the one in Sweden and Germany still manage to ensure that even those graduating without a degree score fairly high on tests of document literacy, , the US, Poland, and Switzerland, those that fail to graduate do extremely poorly on literacy scores (OECD, 1997). Thus failure to graduate is associated with poorer educational achievement, but to different degrees in different countries. In the US, those that fail to graduate from high school face greater exclusion as they lack an important credential and have very poor skills.

48. More generally, there are large differences in the distribution of educational outputs of different educational systems in OECD countries. A more compressed distribution of outcomes is more inclusionary as it reduces the distance between the low achievers and the mean for the country. OECD (1998) provides a number of interesting statistics that can shed light on this question. Taking the example of 8th grade mathematics scores, Table 2 shows mean scores, the scores at the 5th percentile and the difference between the mean score and the 5th percentile and the difference between

the 95th and the fifth percentile.[26] The difference between the 5th percentile and the mean can be interpreted as the extent of exclusion due to ability faced by those at the bottom end of the educational spectrum. This absolute difference ranges from 97 points in Portugal to 189 in Korea.[27] Figure 1 shows that there is a strong correlation between mean scores and the distribution of mathematics scores, suggesting that, to some extent, there appears to be a trade-off between average achievement and its distribution.[28] Apart from this general relation, it is perhaps more interesting to note that there are some outliers in this general relation. For example, France and Australia have similar mean scores, but Australia has a 30% wider distance between mean and the 5th percentile than France. There is a similar discrepancy between Greece and Spain.

49. The next two columns indicate to what extent the differences in scores are due to school characteristics or pupil characteristics. In countries with differentiated school systems, a large portion of differences in performance are due to school characteristics indicating that differentiation leads to a differentiation in performance. In addition, countries where education funding is local, such as the US, school characteristics also play an important role in accounting for differences in outcomes. These results nicely illustrate the extent to which local funding of education and differentiated school systems can become a source of exclusion as they generate large differences in outcomes by school. The table also shows that a differentiated school system does not generate higher mean results, at least in the indicator of 8th grade mathematics performance. Thus differentiated schooling appears not to be an effective tool for raising average standards and may be fostering social exclusion as it fails to develop a group of children to the highest potential.

Table 2: Distribution of Mathematics Scores in the 8th Grade

	5th percentile	Mean	Mean minus 5th percentile	95th minus 5th percentile	School Differences (%)	Pupil Differences (%)	Differen-tiation
Australia	372	530	158	318	74	26	
Austria	394	539	145	299	67	33	Yes
Belgium-Flemish	416	565	149	294	64	36	Yes
Belgium-French	385	526	141	273	74	26	Yes
Canada	389	527	138	281	83	17	
Czech Republic	423	564	141	302	78	22	Part
Denmark	369	502	133	272	94	6	
France	415	538	123	251	75	25	Part
Germany	368	509	141	293	53	47	Yes
Greece	347	484	137	286	86	14	Part
Hungary	391	537	146	302	83	17	Part
Ireland	381	527	146	300	55	45	Yes
Japan	435	605	170	336	98	2	
Korea	418	607	189	368	94	6	
Netherlands	397	541	144	291	49	51	Yes
New Zealand	366	508	142	297	62	38	
Norway	372	503	131	277	94	6	

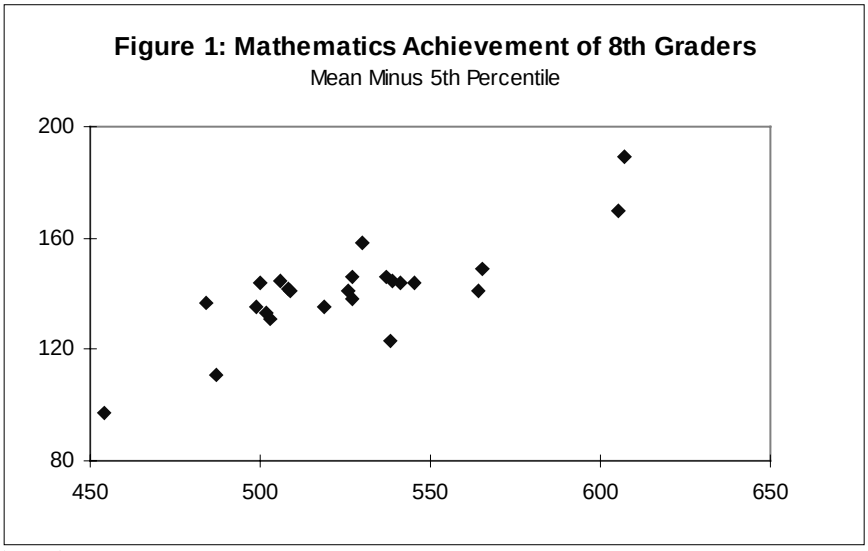
[26] There are some questions to what extent one can interpret these scores as they are based on complex aggregation rules and make a number of implicit cardinal assumptions about what constitutes mathematical ability. For a discussion, see Osberg, 1998.

[27] In percentage terms, the differences are smaller. Korea still has the largest relative distance of the poorest achiever to the mean (5th percentile 31% lower than mean), followed closely by the US and England (each nearly 29% below mean), while Portugal continues to have the smallest difference with about 21%, closely followed by France.

[28] But even poorer achievers in a high achiveing country often do better than average achievers elsewhere. For example, students at the 25th percentile in Japan achieve higher scores than students at the 50th percentile in most countries.

Portugal	357	454	97	212	84	16	
Spain	376	487	111	240	84	16	Part
Sweden	384	519	135	277	89	11	
Switzerland	401	545	144	284	61	39	Yes
UK-England	361	506	145	304	73	27	
UK-Scotland	364	499	135	285	73	27	
US	356	500	144	297	69	31	

Source: OECD (1998), pp. 321, 324



Source: OECD (1998).

50. At the same time, pure reliance on an integrated school system by itself does not necessarily ensure inclusion. Apart from the already mentioned issue of large differences between schools (due to resource, teacher quality, or neighbourhood effects), inclusion without special support for students with special needs or from poorer socio-economic backgrounds could, in theory, leave them as badly (or possibly worse off) than when they are taught in separate educational structures.

51. It is particularly worrisome to note that several forms of social exclusion often get compounded in the educational system. For example, OECD (1998b), and OECD (1997) have shown that children of non-native speakers often do worse in the school system and thus their social exclusion based on ethnicity and language often is compounded in the school system. Similarly, children from care environments do worse in terms of graduation rates and educational achievements and suffer from the double burden of family circumstances leading to a care situation and poor educational outcomes. Finally, the educational system in most countries is apparently unable to greatly diminish the impact of parental socio-economic status on educational achievements, as educational attainment as well as measures of achievements are all closely correlated to parental socio-economic status (OECD, 1997; Gottschalk, et al. 1994). Such an intergenerational transmission of educational (and, as a consequence, socio-economic) status is exclusionary for those it affects as it denies equal access to the intrinsic and instrumental value of high educational achievement.

7. Education and Social Exclusion as Adults

52. Apart from the effect on childhood social exclusion, educational policies can also help promote social exclusion among adults. Much of it relates to the already discussed issues of drop-out, failure to graduate, and poor achievements of the educational system, as these outcomes have negative repercussions for social exclusion as adults. Perhaps the most telling statistic is the relation between educational outcomes and unemployment, one of the most significant forms of social exclusion as adults. Table 3, drawn from OECD (1998), shows the well-known strong linkage between educational

achievements and unemployment among young people. With the exception of Turkey, Spain, and Portugal[29], young people with higher educational attainment, as measured by highest completed education, have up to 50-80% lower unemployment rates. OECD (1998c) shows that the same relation holds in accentuated form for the entire range of working ages. In addition, lower educational attainment not only leads to lower, but also less secure employment and more frequent and longer spells of unemployment and thus generates the dynamics of detachment from the labour market that can lead to long-term social exclusion (Wilson, 1987; Gottschalk et al., 1994; Mincy, 1994; Walker, 1997).

[29] The higher unemployment rates among university graduates in these countries is, among other things, likely to be related to higher reporting of unemployment among this group.

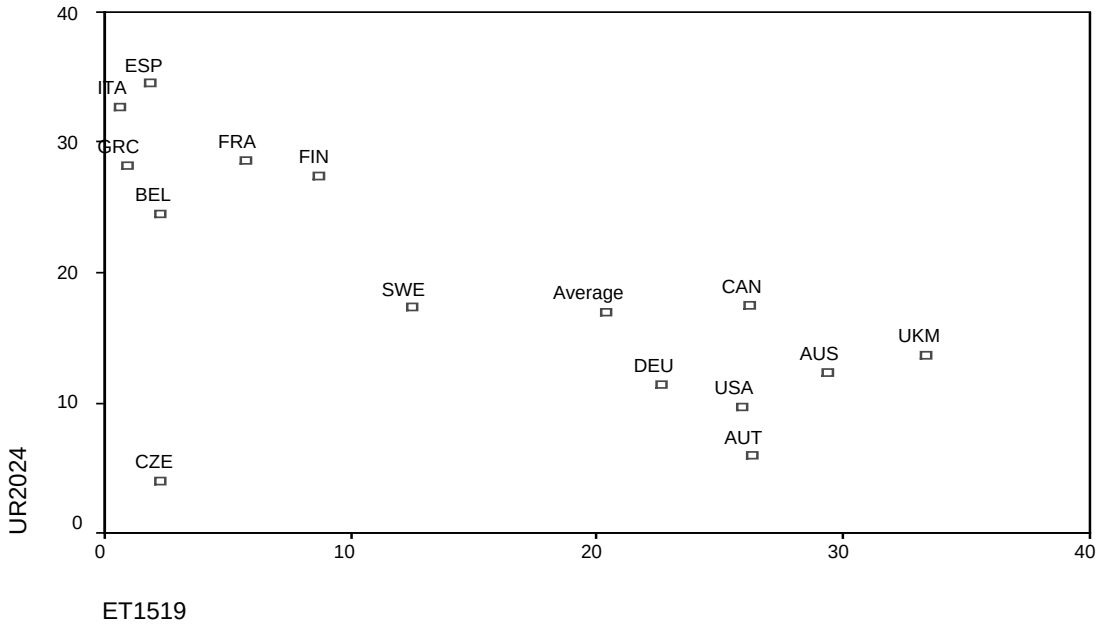
Table 3: Educational Attainment and Youth Unemployment

	Less than Completed Secondary			Completed Secondary			Completed Tertiary	
	15-19	20-24	25-29	15-19	20-24	25-29	20-24	25-29
Australia	22,6	19,8	12	16,5	10,1	7,1	6,7	4,2
Austria	7,4	10,4	8,6	5,7	4,6	3,2	3,9	6,5
Belgium	22,9	29,7	18,9	27,3	19,1	11	14,6	5,8
Canada	22,7	25	21,2	15,9	12,7	11,7	9	5,7
Czech Republic	22,3	12,6	17,9	11,6	3,4	3,6	7,1	1,1
Denmark	2,4	14,7	18,9	5,2	7	7,4	6,8	6,3
France	24,3	37	25,5	26,5	23,5	15	18,2	14,4
Germany	6,8	15,4	17,4	8,4	8,4	7,5		6,5
Greece	32	19,9	13,9	54,2	31,3	15,6	41,2	22,4
Hungary	42,3	22,3	20,8	24,6	11,7	10	3,4	4,1
Ireland	32,3	30,6	24,7	19,4	13,1	7,9	6,5	4,9
Korea	9,8	7,6	3	6,7	5,3	3	7,7	4
Netherlands	18,9	11,8	8,6	8,8	6,6	4,5	11,6	6,6
New Zealand	17,3	14,7	10,8	11,8	7,6	3,5	6,3	2,3
Norway	18,9	16,1	10,5	14,3	9,7	6,2	9,2	5,2
Portugal	16,6	13,8	9,2	38,7	20,4	8,9	25,6	9
Spain	50,3	37	31,7	51,7	40,7	24,8	52,1	31,2
Sweden	22,2	30,9	22,8	23,8	20,2	13,6	10,9	5,1
Turkey	8,8	9,6	6,7	33,9	27,2	11,8	29,1	10,5
UK	31,4	28	21,7	14,9	11,6	9,5	11,3	4,9
US	21,3	19,1	16,2	11,2	9,6	7,1	5,4	2,8
Average	22	21,5	16,7	23,3	15,4	9,6	15,6	8,8

Source: OECD (1998).

53. The situation is even worse for those with poor education and the lack of post-school vocational training (through apprenticeship or similar schemes). Figure 2 (from OECD 1998) shows that those young people who did not participate in an apprenticeship scheme are much more likely to find themselves unemployed later on. Poor education and the lack of training increase the risks of long-term exclusion from the labour market.

Figure 2: Training and Youth Unemployment in OECD Countries



Note: ET1519 refers to the share of 15-19 year olds who are working and training at the same time. UR2024 refers to the unemployment rate of the 20-24 year olds who are not in training.

54. Apart from poor educational attainment, poor educational achievement, as measured by literacy and numeracy tests, has an even stronger impact on unemployment rates. OECD (1997) has shown that poor literacy and numeracy leads to higher unemployment rates, longer spells of unemployment, and greater risks of permanent detachment from the labour force.

55. Thus educational systems that fail a portion of its students not only lead to social exclusion through denying them this basic right of citizenship in sufficient quality, but also through fostering social exclusion as adults.

56. Closely related to the link between education and employment are the links between education and earnings. Table 4 shows that students achieving less than a completed secondary education earn between 7 and 36% less than those with a high school degree. Those with a university degree earn between 80 and 200% more than those with less than secondary education. As income increasingly determine the ability to be included, the lack of income generated by poor education helps foster the many ways poverty can generate social exclusion, only some of which can be reduced through social welfare programs that transfer resources to the poor (Klasen, 1998).

Table 4: Earnings by Education (Completed Secondary Education=100)

	Less than complete secondary		Complete University	
	Male	Female	Male	Female
Australia	105	87	161	139
Canada	87	76	152	172
Czech Republic	72	75	155	149
Denmark	86	87	138	132
Finland	91	93	187	173
France	85	79	185	167
Germany	82	82	152	151
Hungary	79	68	189	150
Ireland	77	62	171	187
Italien	73	76	173	129

60. A second important impact is on other important aspects of well-being. People who have suffered from childhood social exclusion in education are at risk of being poor and unemployed for longer and more often than others. Apart from the exclusionary effects of these problems, they are associated with lower health outcomes, poorer access to housing, poorer access to food, and poorer access to health care (Atkinson, 1998b).

61. The third important societal impact of childhood social exclusion is the burden it places on the next generation. Children from people suffering from social exclusion will need considerably more support and resources to ensure that they will gain equal opportunities of participation in education and society at large.

62. A fourth important societal impact relates to social cohesion as a country. Social exclusion can threaten the stability and legitimacy of the democratic order and the governance of societies, as all democratic societies rely on the participation and support of its citizens for the effective functioning of government. Clearly, social exclusion is not only a violation of rights of those suffering from it, but also has great negative impacts on their well-being as well as society at large.

8. Conclusion and Policy Issues

63. This paper has attempted to link issues of child well-being and development, education, and social exclusion. The starting point was to define childhood social exclusion and then examine to what extent educational policies can foster social exclusion among children or among adults. We then applied Sen's capability approach to the issue of social exclusion and used the UN Convention on the Rights of the Child to identify particularly important rights that can prevent social exclusion. The obligation of the educational system to enable the development of each child to the highest potential was identified as central to the issue of social exclusion.

64. Applying this framework to educational systems and outcomes, we identified a variety of ways in which educational systems can help generate social exclusion. In particular, segregation of children with special needs, permanent exclusion of unruly and difficult children, and, to some degree, differentiated schooling structures can foster social exclusion, particularly if they are primarily aimed at freeing the regular school system from poorer achievers and more difficult students rather than cater specifically to their needs. The data on educational outcomes discussed here suggest that segregation and differentiation are often associated with poorer results for the 'lower' or 'special' branches and thus appear not to succeed in developing these children to the highest potential. They may also, in the process, reduce the inclusionary nature of the educational process.

65. Moreover, many educational systems fail to adequately educate a considerable portion of its students. For discussions of social exclusion, the distribution of such educational outcomes and the factors causing student failure and poor performance are critical. All educational systems also appear to be unable to sufficiently counterbalance the effects of parental socio-economic status, ethnic and linguistic barriers, and difficult family backgrounds.

66. The impact of such educational outcomes is to exclude children from the benefits of education and the citizenship rights and the opportunities it opens up. It also contributes to social exclusion as adults through the nexus of educational outcomes and unemployment, poverty, and neighbourhood dynamics.

67. Stating that all OCED countries fail to some extent to prevent social exclusion does not necessarily imply a clear policy-agenda. In fact, all countries attempt, to some degree, to address the issues identified above and no country can be faulted for a lack of concern about them. Moreover, it is not

entirely clear that governments have the means at their disposal to ensure the complete absence of social exclusion among some groups. In particular, although there is some consensus that school resources influence educational outcomes, appropriate redistributions of school resources is unlikely to counterbalance the effects of parents and neighbourhood entirely.[30] In that sense, a sole focus on education to combat exclusion is not likely to be very effective.

68. Finally, there may be important trade-offs to consider when contemplating policies that can lessen social exclusion. For example, there may be a trade-off between fostering excellence, raising average achievements, and raising the achievement of the poorest performers.

69. With this cautionary note in mind, what are the important policy question that should be considered? An important starting point for policy analysis in each OECD country could be the distribution of educational outcomes among children, the correlation of educational outcomes with parental and neighbourhood effects, and the impact of these differences in outcomes. A wide distribution of outcomes (esp. in the case of average or below average mean achievements), combined with high correlations with parents and neighbourhoods, and sizeable socio-economic outcomes related to these differentials should sound alarm bells that the educational systems may be fostering social exclusion. Further analyses should be directed to the structure and dynamics of the educational system, especially the relation between educational differentiation and outcomes, the effects of school choice, and the effect of school resources in producing this wide distribution of outcomes. Finally, the feasibility, costs, and trade-offs of policies aimed at reducing exclusion need to be carefully evaluated. A comparative perspective should be very helpful in this regard as OECD countries differ greatly in their success in preventing social exclusion. The lessons from these different experiences can then guide the development of appropriate policies to reduce the incidence of social exclusion to the extent possible. OECD (1998b) provides some important lessons on how to reduce exclusion and failure at school as does a large literature on the US experiences (e.g. Murnane, 1984).

70. But it is important to note that all policies to reduce childhood social exclusion will have to go beyond the education system and tackle the issues that create the disadvantages for some children in the first place. Policies that may be able to address these issues have to deal with poverty, inequality, discrimination, unemployment, access to public and social services, and the geographical concentrations of economic and social disadvantage. Only if there is substantial progress in these areas, will the educational systems be able to address some of the remaining problems.

[30] For some discussion on these issues, see Card and Krueger, 1998, Case and Deaton 1995, Case and Katz, 1990.

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