

EDUCATION POLICY ANALYSIS 2003

(Phillip McKenzie, 3 November 2003)

Purpose of the Series

Improving the quality of education is a key policy objective in OECD countries. Major education reforms are underway around the world in response to the demands of making lifelong learning opportunities available to all. *Education Policy Analysis* provides an opportunity to reflect on, and learn from, this rich international experience.

The *Education Policy Analysis* series was launched by the OECD in 1996. It forms part of the work programme of the OECD Education Committee, and responds to the policy priorities established by OECD Education Ministers. Its main purposes are:

- To assist education policy-makers and others concerned with education policy to make better decisions by drawing on international and comparative work;
- To draw out the key insights and policy implications arising from OECD education activities, international data and indicators, and related studies; and
- To present findings, analyses and discussion in a succinct and accessible form.

Education Policy Analysis is produced annually.

Overview of the 2003 Edition

The 2003 edition contains state-of-the-art reviews of policy issues and international developments in:

- the ways that countries define *students with disabilities, learning difficulties and disadvantages*, the approaches they are taking to meeting their needs, and what these imply for debates about equity and inclusion;
- new approaches to *career guidance*, for both young people and adults, that facilitate lifelong learning by developing career management skills over the lifespan;
- the profound changes underway in the objectives and clientele of *higher education*, and what these imply for the way higher education is financed and governed; and
- policy options for making sure that *investments in adult lifelong learning* – by individuals, governments and enterprises – pay off and are sustainable over the long-term.

The 2003 edition also includes, for the first time, a summary of *major education policy changes* across a wide range of fields in OECD countries.

Chapter 1: Diversity, Inclusion and Equity: Insights from Special Needs Provision

Creating equitable provision for diverse student populations is a key feature of education policy in OECD countries. At the centre of this challenge lies the goal of inclusion, leading ultimately to improved social

cohesion. Education systems are expected to play their part in these social aspirations and countries have initiated a range of approaches intended to contribute to them. This chapter contributes to this task by drawing on international data and experience based on programmes for students with disabilities, difficulties, and disadvantages. As well as documenting the wide variety of country approaches, it makes two main arguments: (i) a ‘rights-based’ conception of equity implies that, wherever possible, these students should be educated in regular, mainstream schools rather than in separate institutions; and (ii) the various national approaches to including students with disabilities in regular schools provide useful lessons for the wider debates about educational diversity and equity.

The chapter analyses an extensive range of international data on programmes for students with disabilities, learning difficulties and disadvantages. It also draws on case studies of schools where inclusion appears to be working well to identify a number of conditions which are important in developing inclusive schools for students with disabilities. These features, which are drawn from eight OECD countries, also seem to be important for improving education for students as a whole.

OECD countries are committed to ensuring that their education systems are equitable outcomes for all students, which requires them to provide for groups with diverse needs. An important part of this task is to structure programmes for students with disabilities, difficulties, and disadvantages in a way that respects and protects these groups’ rights. This does not have clear-cut implications for the distribution of resources, since for many disabled students, for example, no amount of resources could produce outcomes equal to those of their non-disabled peers. Thus while this chapter provides an extensive international analysis of the allocation of resources to various groups (including by gender and age), these are indicators of the extent to which countries engage in a *process* of pursuing equity, rather than measuring progress towards an objective, well-defined standard.

What we can do, however, is to identify some key conditions that allow this process to be taken forward. The first is to recognise and plan for diversity. An indicator of whether this occurs is how many students attend special schools: this varies greatly across countries, and where it is high, this is a sign of mainstream schools’ failure to accommodate diverse needs. Among a range of other conditions identified in the later part of this chapter, some relate to what is going on inside the school system, such as staff development and co-operation among schools, while others cover external relationships such as accountability and community involvement. The different national approaches documented in this chapter open up important questions about what works best for different types of students. Reforms in OECD countries are allowing understanding to accumulate on how best to address these issues, yet much remains to be done.

Chapter 2: Career Guidance: New Ways Forward

Two key challenges today face those responsible for career guidance services in OECD countries. In the context of lifelong learning and active labour market policies, they must:

- provide services that develop career management skills, rather than only helping people to make immediate decisions; and
- greatly widen citizens’ access to career guidance, extending access throughout the lifespan.

This chapter presents arguments for the importance of career guidance for public policy, and outlines some of the ways that OECD countries are responding to these two challenges. It is based on a major review of career guidance in 14 OECD countries.

Career guidance plays a key role in helping labour markets work and education systems meet their goals. It also promotes equity: recent evidence suggests that social mobility relies on wider acquisition not just of

knowledge and skills, but of an understanding about how to use them. In this context, the mission of career guidance is widening, to become part of lifelong learning. Already, services are starting to adapt, departing from a traditional model of a psychology-led profession interviewing students about to leave school (see the Box for some recent country initiatives).

One key challenge for this changing service is to move from helping students decide on a job or a course, to the broader development of career management skills. For schools, this means building career education into the curriculum and linking it to students' overall development. A number of countries have integrated it into school subjects. However, career education remains concentrated around the end of compulsory schooling. In upper secondary and tertiary education, services focus on immediate choices rather than personal development and wider decision-making, although this too is starting to change in some countries.

A second challenge is to make guidance more widely available throughout adulthood. Such provision is underdeveloped, and used mainly by unemployed people accessing public employment services. Some new services are being linked to adult education institutions, but these are not always capable of offering wide and impartial advice. Efforts to create private markets have enjoyed limited success, yet public provision lacks sufficient funding. Thus creation of career services capable of serving all adults remains a daunting task. Web-based services may help with supply, but these cannot fully substitute for tailored help to individuals. The Box provides some examples of recent country initiatives.

Box Career guidance: Using innovation to widen access

Australia's national careers web site (www.myfuture.edu.au) contains information about courses of education and training, about labour market supply and demand at the regional level, on the content of occupations, and on sources of funding for study. Users can explore their personal interests and preferences, and relate these to educational and occupational information. In its first seven months the site was accessed 2.5 million times.

In **Austria** three large career fairs are held each year. They cover vocational training, tertiary education and adult education. They are visited by thousands of people, involve hundreds of professional and trade organisations, employers, trade unions and educational institutions, and are strategically marketed to schools and the community.

Canada's public employment services contract many career guidance services to community organisations, which are often seen as more attuned to the needs of particular groups: single parents or Aboriginal people, for example. Some of these organisations focus mainly on career development activities, such as information services, career counselling and job-search workshops. Others have a wider range of education, training and community functions. Some have career guidance professionals on their staff: many do not.

In **Spain**, the international company Altadis has a career development programme, built around a database of employees' qualifications and descriptions of existing positions in the firm. Those taking part in the programme are interviewed regularly to assess their competencies and aspirations against future business needs. As part of a planned redundancy programme negotiated with the trade unions, Altadis offers career counselling to employees, and has contracted a specialist outplacement firm to provide this service. The outplacement firm normally employs psychology or economics graduates to deliver it.

In **the United Kingdom** call centre technology is being used to widen adults' access to education. The service, *learnirect*, provides both information and more extensive career advice to callers. The staff of the service have relevant qualifications at one of three levels, depending upon the nature of their work, and can call upon an online database of information on over half a million education and training courses. Over four million people have called the national advice line since it was established in 1998. The help line is open between 8.00 and 22.00, 365 days a year.

Chapter 3: Changing Patterns of Governance in Higher Education

Almost without exception, OECD governments have recently been reforming, reviewing or restructuring their higher education systems. Behind such reforms lie profound changes in the objectives of higher education and the challenges that it faces, and with it the character of its institutions and its clientele. It is now well understood that universities and other higher education institutions need to adapt to a more complex environment in which expectations of higher education have changed beyond recognition.

What does this mean for the way in which higher education is run and governed? In the 20th century in most OECD countries, governments exercised considerable control and influence over the sector, to help pursue objectives such as economic growth and social equity. Today, on the one hand, governments have a greater interest than ever in ensuring that educational institutions help meet economic and social needs, given their importance in knowledge-oriented societies. On the other hand, they accept that central planning of knowledge creation, teaching and learning is often inefficient, and that a thriving society and economy require institutions to operate with a degree of independence, while market mechanisms are often more effective than administrators in regulating supply and demand for diverse forms of learning delivered to diverse client groups.

Thus the governance of higher education faces some difficult challenges. If higher education is indeed an important strategic lever for governments in seeking to pursue national objectives, can governments achieve those ends without compromising the independence of universities, or their dynamism in catering for new markets?

This chapter looks at how governments are addressing that question, and at how they are tackling a range of related issues around the governance of higher education institutions. It does so by looking at the degree to which such institutions are able to exercise autonomy and develop their own internal strengths, while still preserving a coherent higher education system overall. Specifically, this involves considering the changing levers of governance in relation to five aspects of the running of higher education:

- First, how much freedom institutions have to run their own affairs;
- Second, the extent to which they rely on government funding or can draw on other sources;
- Third, the changing ways in which the higher education system itself is subject to quality assurance and control;
- Fourth, the strengthening of the governance of the institutions; and
- Fifth, new roles for their leaders.

Overall, the higher education reform agenda has involved governments in greater focus on strategy and priority setting and less involvement in the running of the system on a day-to-day basis. In some countries this has included the creation of agencies to monitor the quality of teaching and research, and the emergence of “intermediate” or “buffer” bodies to distribute public resources. Thus, the current policy environment is as much about developing new approaches, led by concepts such as “strategic management”, “deregulation” and “accountability” as it is about influencing the behaviour of higher education institutions directly.

Chapter 4: Strategies for Sustainable Investment in Lifelong Learning

Lifelong learning is a core strategy for moving to a knowledge society, and ensuring that the benefits are equitably distributed. However, adult learning is the weak link in the lifelong learning framework. Many barriers have contributed to the limited degree to which adults in general and disadvantaged adults in

particular participate in learning. Teaching methods are not always appropriate, and individuals may lack accessible and supportive services needed to balance work, family and learning. This chapter focuses on a particularly critical barrier, that of resources, which involves limits on time and money. As yet, the resources needed for more extensive adult learning have not been systematically analysed. OECD countries face critical questions about how to achieve and sustain the increased levels of investment needed to ensure that opportunities are available to all those who seek them, and to ensure that society is investing at economically efficient levels.

Although the benefits of adult learning cannot be expressed in financial terms alone, economic considerations are important. If individuals, enterprises and governments are to invest more in adult learning, it must be “economically sustainable” (projected benefits must be sufficient to offset the costs) and “financially sustainable” (there must be a means of paying today for benefits that may arrive well into the future). While investment in young people’s education has high sustainability in both senses, this is less true for adult learning.

This chapter first sheds light on the economic sustainability of adult learning by making illustrative calculations about rates of return from mid-life study. Its findings suggest that, under prevailing policy, the economic returns provide only modest incentives for individuals – particularly adults in employment -- to undertake more lifelong learning. Intervention is needed to ease the burden of foregone earnings and to shorten study periods by giving adult learners credit for what they already know.

The financial sustainability of adult learning hinges on mechanisms to share costs among individuals, government and employers. Governments should cover costs for the least advantaged, and create the means for other parties to share costs. The chapter explores recent initiatives in 10 OECD countries, that aim to make such “co-financing” a reality. They have shown promise, although it has proven difficult to reach those disadvantaged groups who badly need new learning opportunities. Nevertheless, the wide range of initiatives now underway provides insights on what might work for individuals and enterprises.

Annex: Recent Education Policy Developments in OECD Countries

The Annex summaries major education policy developments in OECD countries. The summaries, which were provided on a voluntary basis, give an overview of major policy initiatives that are likely to interest an international audience, and sources where further information can be found.

The summaries emphasise the broad scope of education policy making in OECD countries. The countries have highlighted policy developments within a framework of lifelong learning, ranging from early childhood and preschool education (*e.g.* Austria, Korea and New Zealand) through to adult learning and workplace training (*e.g.* Denmark, Finland and Spain). The breadth of policy initiatives makes them difficult to readily categorise, although several common themes are evident.

First, almost all the countries have drawn attention to policies intended to lift the quality of learning in the compulsory school years. This emphasis has included more clearly specifying the key skills and knowledge that students need to achieve [*e.g.* Belgium (French community), Germany and Japan], introducing external evaluations of student learning and school performance (*e.g.* the Netherlands, Norway and Portugal), and strengthening teacher expertise (*e.g.* in teaching reading in the United States). The adoption of frameworks that specify learning objectives and accountability requirements have generally been part of a broader reform package that also provides schools with more operational autonomy (*e.g.* in Finland and Italy).

Second, issues of social disadvantage and student alienation continue to be major concerns, with programmes aimed at reducing the number of young people without qualifications (*e.g.* France and

Germany), improving student motivation (*e.g.* the United Kingdom), or reducing differences in education opportunities across regions (*e.g.* Korea).

Third, the higher education sector has been a particular focus of reform in most countries. These changes have generally been in the direction of providing institutions with more autonomy within a framework of greater external accountability for performance. Within Europe a major impetus for higher education reform has been the Bologna Declaration with its goal of a common framework of higher education degrees, and several countries have drawn attention to changes in the structure of their higher education qualifications (Denmark, Germany, the Netherlands and Norway).

Finally, the organisation and administration of the education sector is undergoing substantial change in a number of countries. The moves towards greater operational autonomy for education institutions and more involvement by local authorities mean that central education departments are becoming less involved in the direct provision of education, and more focused on strategic planning and the evaluation of outcomes.