



JAMIL SALMI
Global Tertiary Education Expert



Equity, Inclusion and Pluralism in HE - Lessons of Experience

Hong Kong - 10 November 2021




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The story of two
Nobel prize winners (almost)

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Lord Rutherford

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Lord Rutherford



Chris Langan



Chris Langan, most intelligent person
in the world

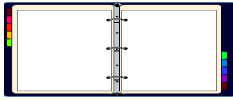
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Outline

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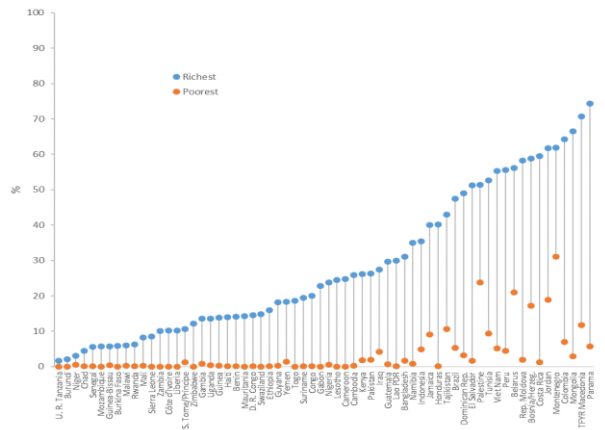
- Equity Target Groups
- Scope of Disparities
- Main Factors of Unequal Access and Success
- Impact of Covid
- National Equity Promotion Policies
- Institutional Level Equity Promotion Policies

Equity Target Groups

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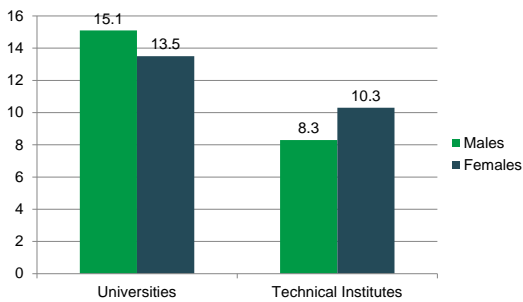
- Low-income
- Gender
- Minorities
- Special need students
- Intersectionality

Equity Groups	Country Examples
First-generation students	Australia, United States
LGBTQIA	Brazil, Colombia
Victims of sexual abuse / violence	Colombia, Ecuador, Spain
Deported migrants	Ecuador, Mexico
Children of invalid veterans or civil servants	Mexico, Russia, Vietnam
Foreign refugees	Australia, Colombia, New Zealand
Children of military families	England
Internally displaced people because of civil war or natural catastrophes	Colombia, Georgia
Demobilized guerrilla fighters and paramilitaries	Colombia
Students who do not speak the national language	Denmark
Students with care experience, orphans, youth without parental care	Austria, Georgia, Kyrgyzstan, Russia
Single mothers	Ecuador
Families with more than 3 children	Georgia, South Korea
Children of parents deported during the Soviet era	Georgia
Jailed people, ex-offenders	Venezuela, Wales
Students from occupied territories	Georgia



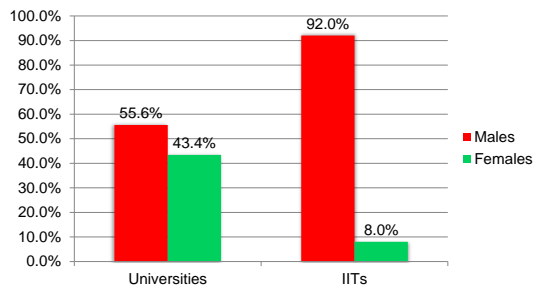
Gender distribution in Peru

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Gender distribution in India

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Clennon King, a black student who applied to the University of Mississippi in 1958, was forcefully committed to a mental asylum. The presiding judge ruled that a black person must surely be insane to think that he could be admitted to the University of Mississippi.



Main Drivers of Disparities

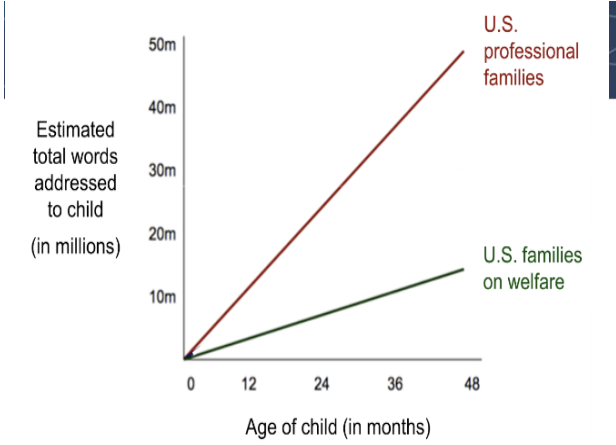
- Lower education pipeline
- Financial barriers (tuition fees, living expenses, opportunity cost, labor market prospects)
- Non-financial barriers (cultural capital, academic preparation, information, motivation)

Where it all starts...

- 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

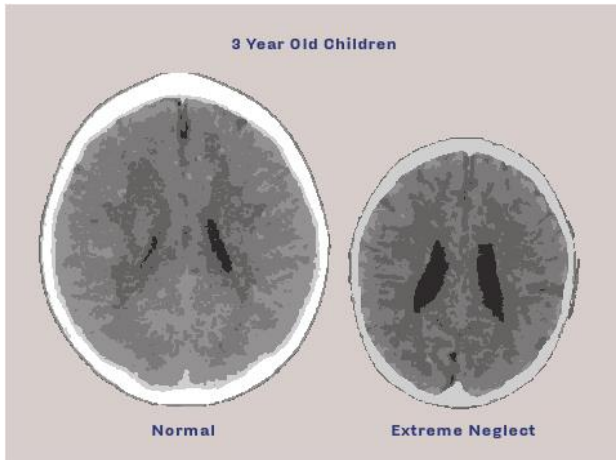
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United States

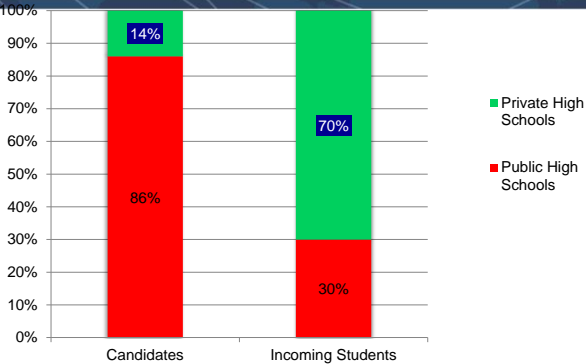
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- By age 3, children from wealthy families have heard 30 million more words than those from low-income families
- By age 4, there is an 18-month academic gap between an impoverished child and his wealthier peers



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

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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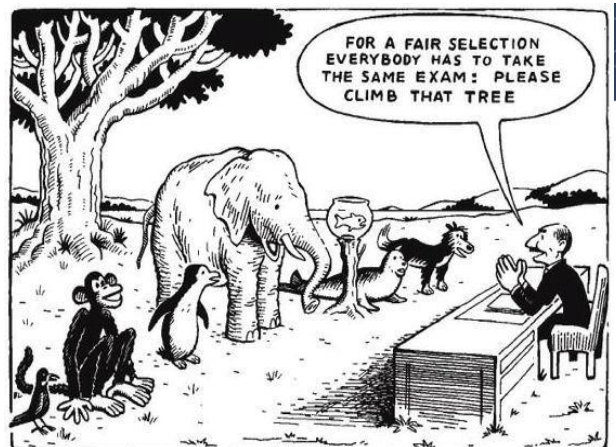
- Academic preparation

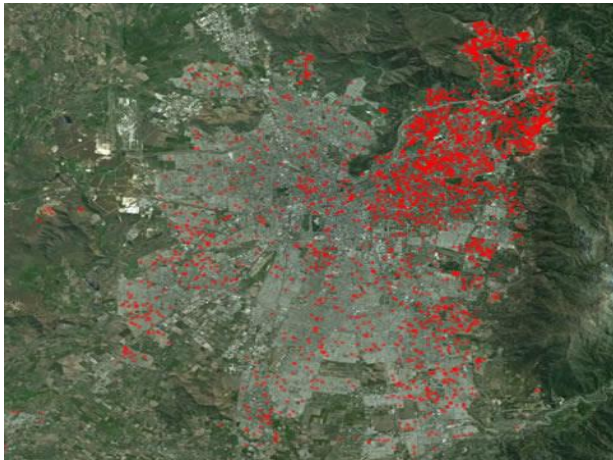
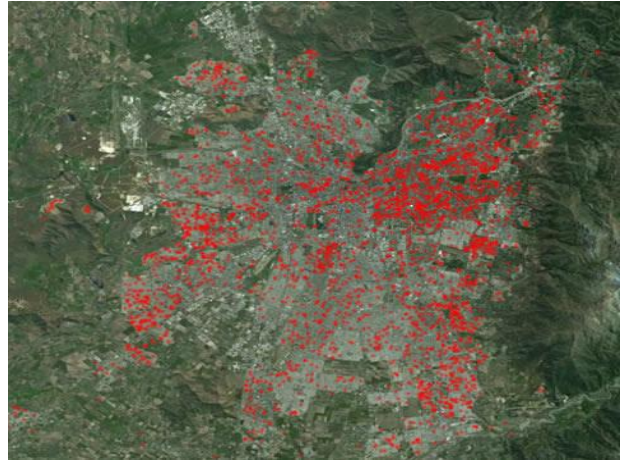
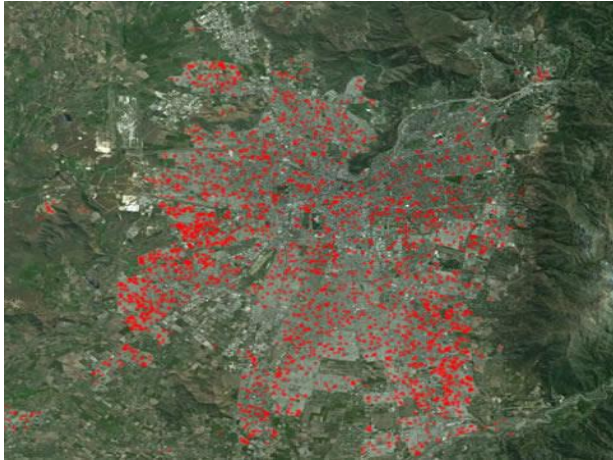
Fair is fair

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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)

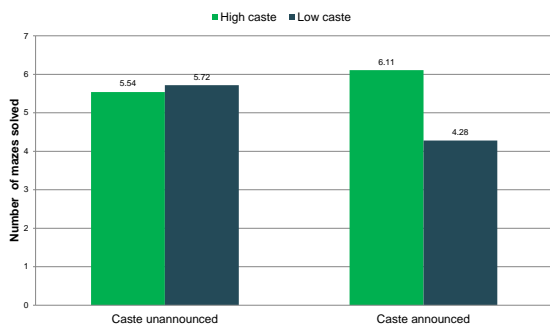




Non-financial factors JAMIL SALMI
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- Academic preparation
- Motivation

Effects of caste identity on academic performance JAMIL SALMI
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Source: K-Hoff and P.Pandey, *Baked Systems and Durable Inequalities: An experimental investigation of Indian caste*, p.13. Policy Research Working Paper (Washington, DC: World Bank, 2004).

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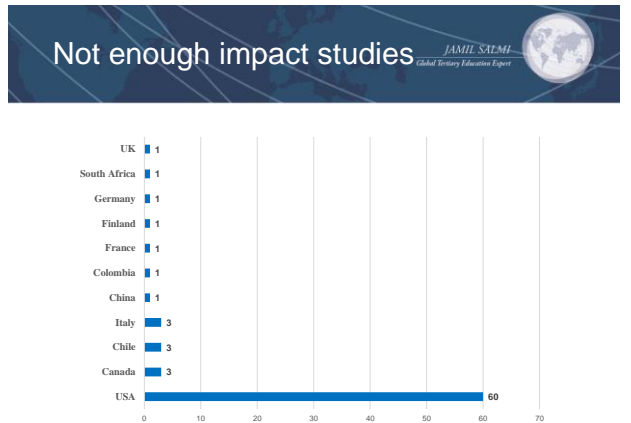
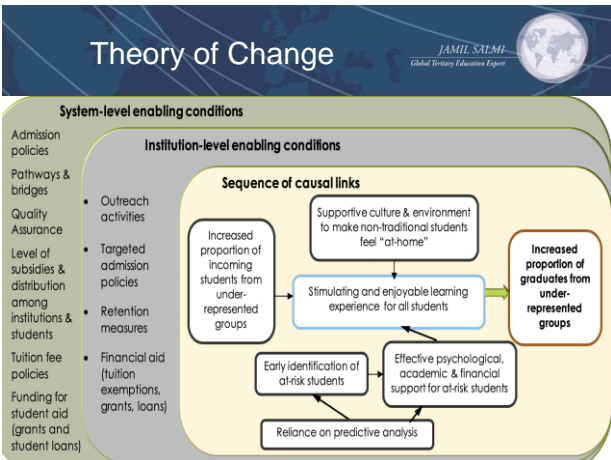
- Academic Preparation
- Motivation
- Information



Impact of Covid-19

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Factors of Readiness	High-Income Countries	Middle-Income Countries	Low-Income Countries
Financial difficulties to continue living as a student	✓	✓✓	✓✓✓
Lack of device and internet connection	✓✓	✓✓	✓✓✓
Academic difficulties	✓	✓✓	✓✓
Emotional distress	✓✓	✓✓	✓✓
Risk of dropping out	✓	✓✓	✓✓



Not enough relevant data

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Equity Groups	Number of Countries
Gender	47
Socio-Economic Background	36
Rural Origin	33
Adult / Mature Learners	33
People with Refugee Status	32
Disability	31
Ethnicity	29
Language	20
Indigenous Groups	16
Religion	14
Others	14

National Level Equity Policies

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- Admission policies
- Pathways
- Quality assurance
- Level of public funding and allocation mechanisms
- Tuition fee policies
- Student aid

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

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)

Institutional Level Equity Policies

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- Outreach and bridges
- Targeted admission
- Retention measures
- Financial aid

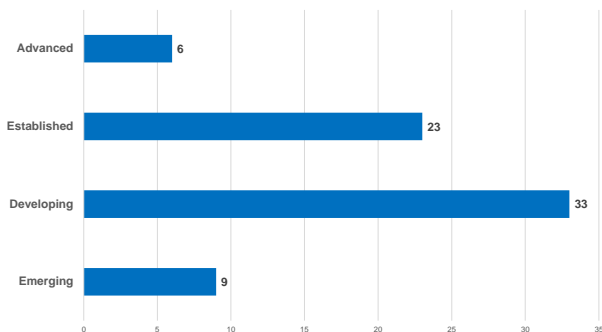
What Works at the National Level

- Alignment of vision, leadership, goals, policy instruments, and resources
- Continuity of policies
- Adequate governance (contrasting Australia and Vietnam)
- Supranational influence (Austria)

What Works at the Institutional Level

- Clear vision and strategy (Wollongong, Uniminuto)
- Equity leader and dedicated department (Wits)
- Partnerships with local authorities and businesses (Antioquia)
- Model practices picked up by other institutions and/or Government (Valle)
- Appropriate institutional culture for first-generation students (Australia)

Benchmarking



The Champions

- Australia, Cuba, England, Ireland, New Zealand and Scotland

Conclusion

Equality of opportunity

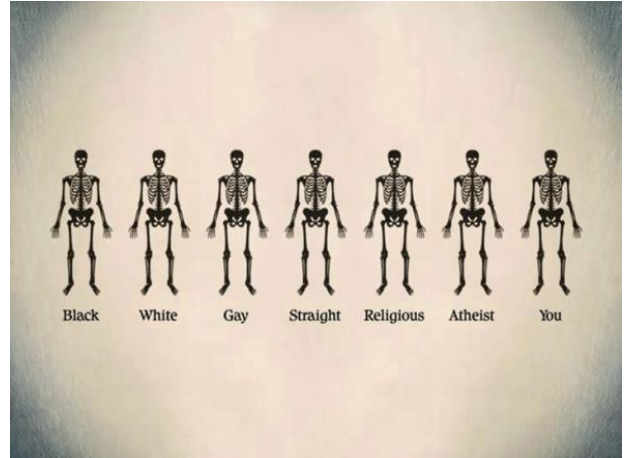
The impertinent courtesy of an invitation offered to unwelcome guests, in the certainty that circumstances will prevent them from accepting.

Richard Tawney

It is not wrong to be different.



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



Lessons Learned

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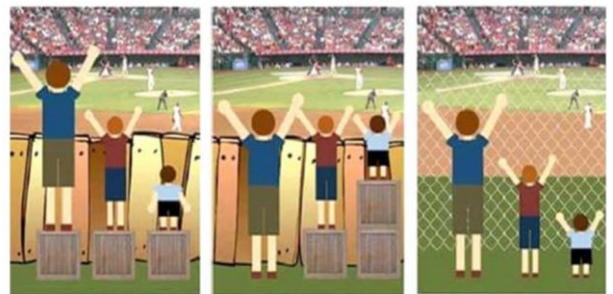


- National vision / targets / resources
- Combination of financial and non-monetary policies
- Complementarity of national and institutional-level measures
- Importance of monitoring and evaluation
- Need for adequate data

Exclusion

Integration

Inclusion



Advancing Equity and Inclusion: A guide for Municipalities (ICRW)