

# GEMR/IIEP Policy Paper 30

## Evidence-based policies for equity and affordability



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## Sustainable Development Goals

- merge development (MDG 2000-2015) and environment (Rio 1992-) agendas
- 17 goals with 169 targets
- adopted by UN Member States in 2015
- to be achieved by 2030



## SDG 4 on education

**Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all**

- 1 goal with 7 targets and 3 means of implementation
- merges and significantly expands development (MDG 2000-2015) and EFA (Jomtien/Dakar 1990-2015) agendas

## Global Education Monitoring Report

- mandated to monitor and report on education progress in SDGs



**Planet:**  
environmental  
sustainability



**Peace:**  
political participation,  
peace and justice



**Prosperity:**  
inclusive and  
sustainable  
growth



**Place:**  
inclusive and  
sustainable cities



**People:**  
inclusive social  
development



**Partnerships for  
sustainable  
development**

## Goal 4: Ensure inclusive and equitable quality education and lifelong learning opportunities for all



### Target 4.3

By 2030 ensure equal access for all women and men to affordable and quality technical, vocational and tertiary education including university

### Target 4.7

By 2030 ensure that all learners acquire the knowledge and skills needed to promote sustainable development including education, global citizenship and cultural diversity

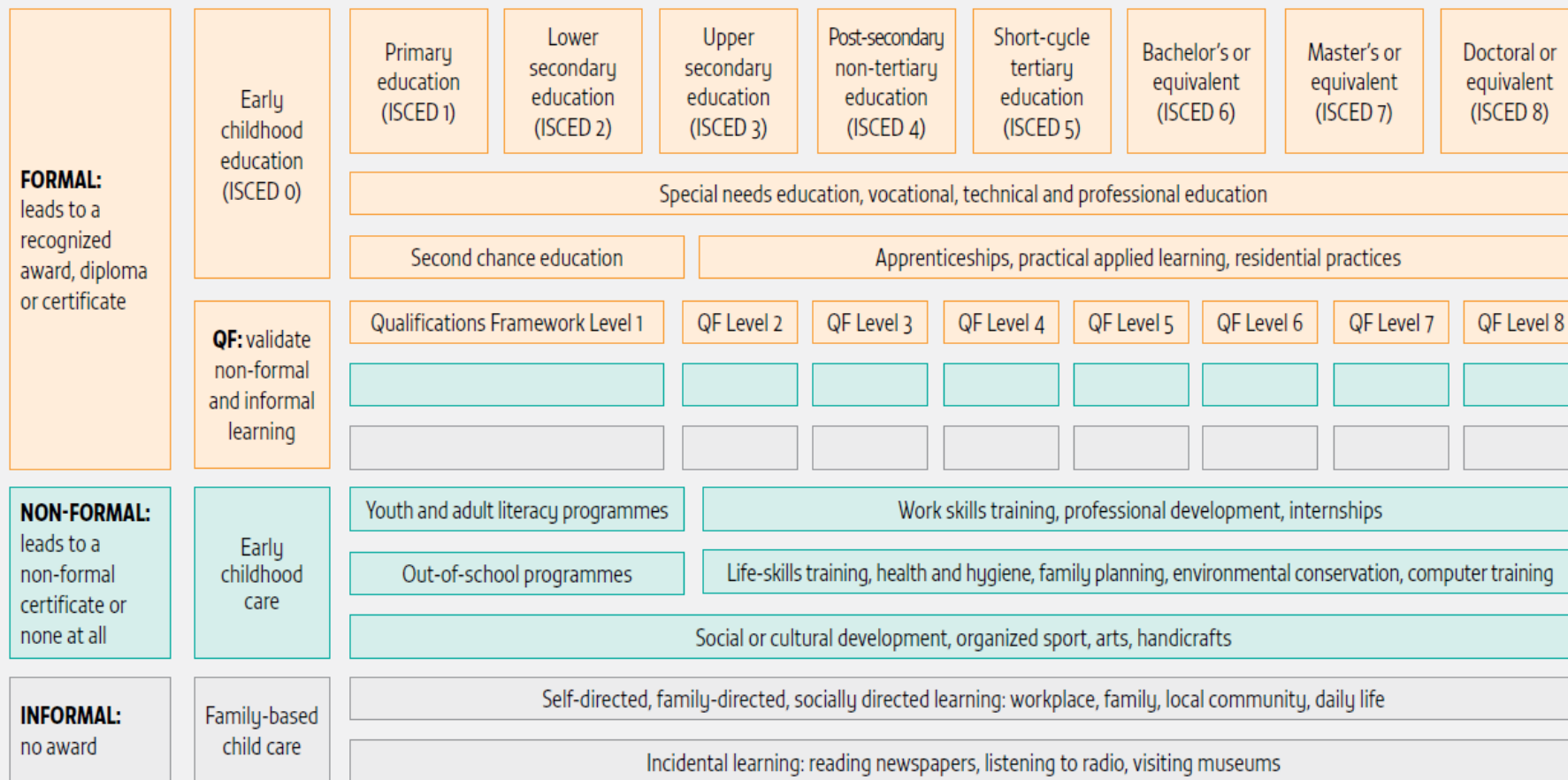
### Target 4.b

By 2020 substantially expand globally the number of scholarships available to developing countries ... for enrolment in higher education ... in developed countries and other developing countries

# Goal 4: Lifelong learning

**FIGURE 0.1:**

**Lifelong learning opportunities for all**



Source: GEM Report team.

# Higher education: a core component



*“The SDGs provide a unique opportunity for higher education institutions to demonstrate their willingness and capability of playing an active and meaningful role in the development of their respective countries and in contributing towards global sustainable development”*

Goolam Mohamedbhai  
Former president of the  
**International Association of Universities**

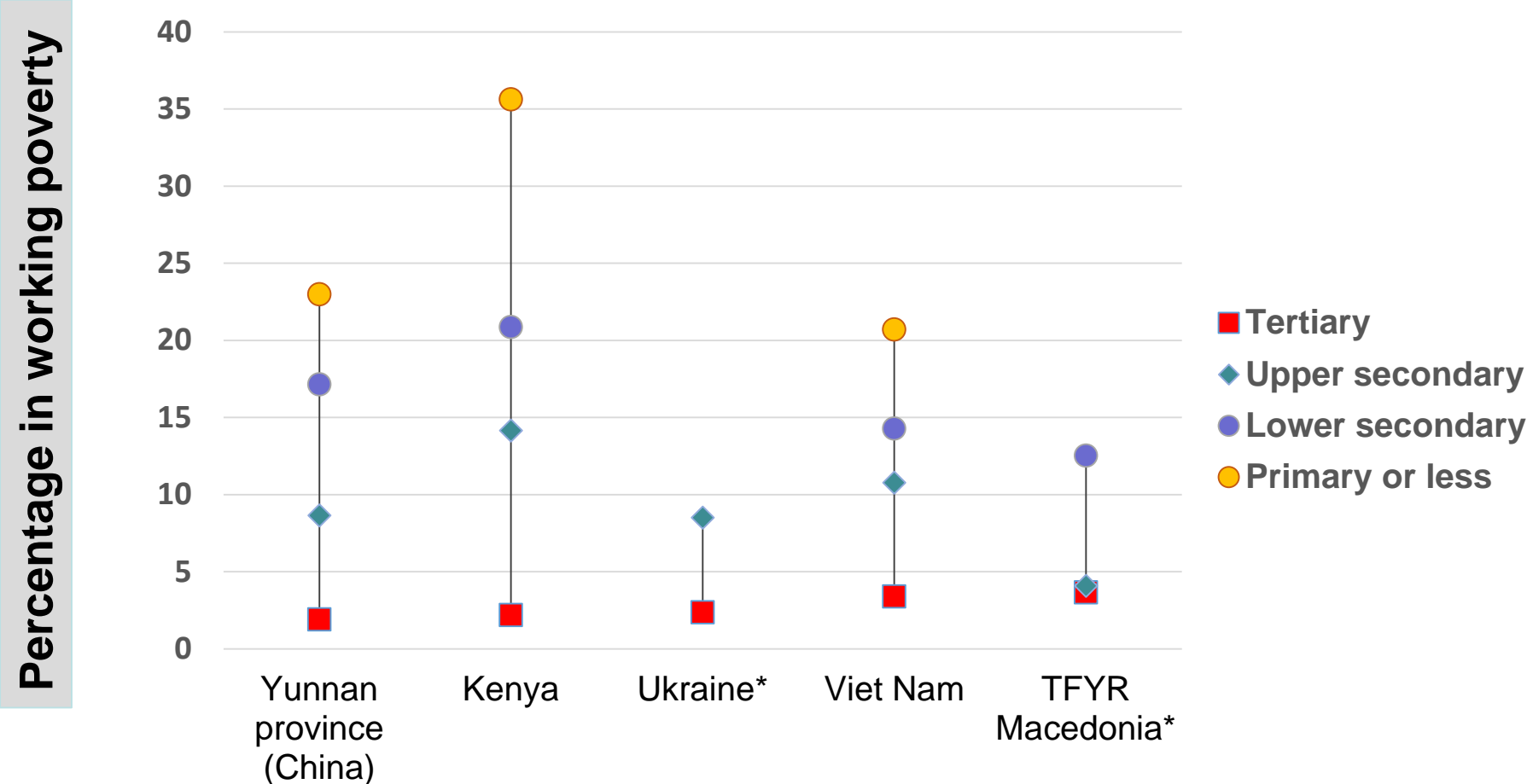
# Higher education is a catalyst for growth



- Increasing tertiary attainment by one year would increase sub-Saharan Africa's GDP by 16%
- By 2020, the world could have 40 million too few workers with tertiary education, relative to demand

# Upper secondary attainment and tertiary education reduces working poverty and informal employment

If workers from rich and poor backgrounds had the same education, working poverty among the poor would be reduced by 39%





Worldwide, there are **DOUBLE** the amount of students in higher education now than there were in 2000



100 million students  
in the year 2000

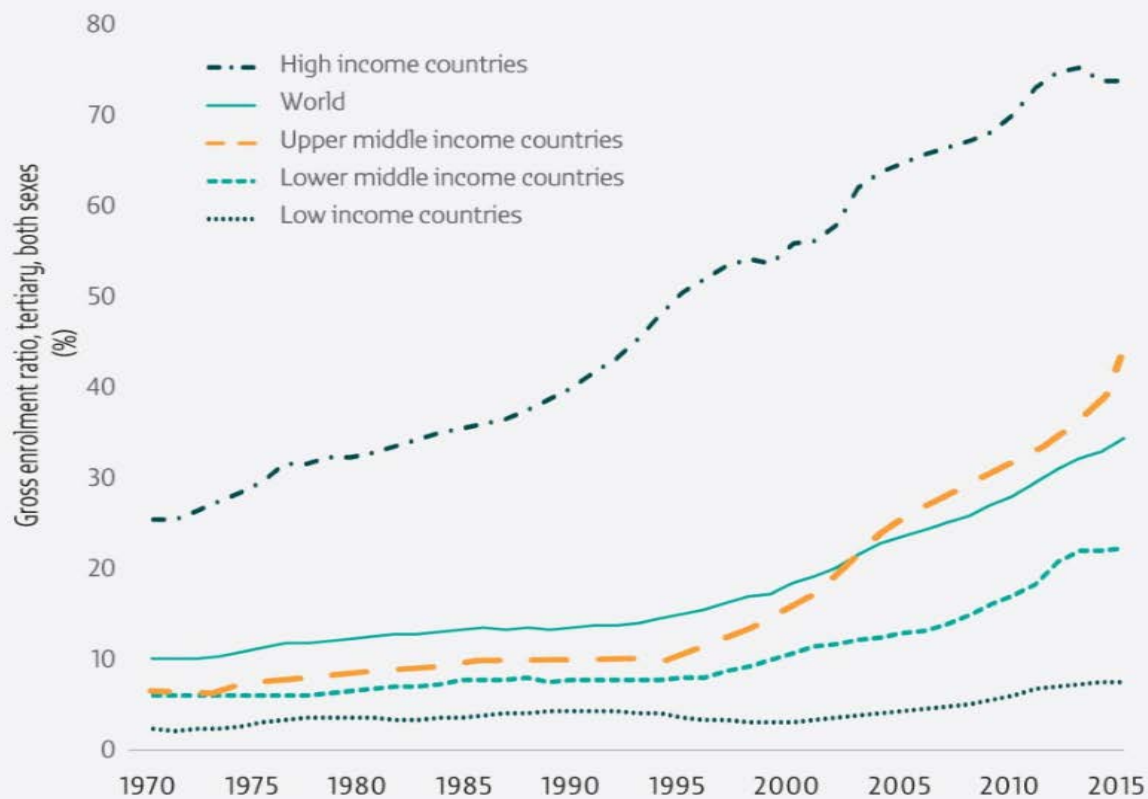


207 million students  
in 2014

### FIGURE 1:

**Enrolment in upper-middle income countries grew by 7% per year**

Gross enrolment ratio, higher, both sexes (%), by country income level, 1970–2014

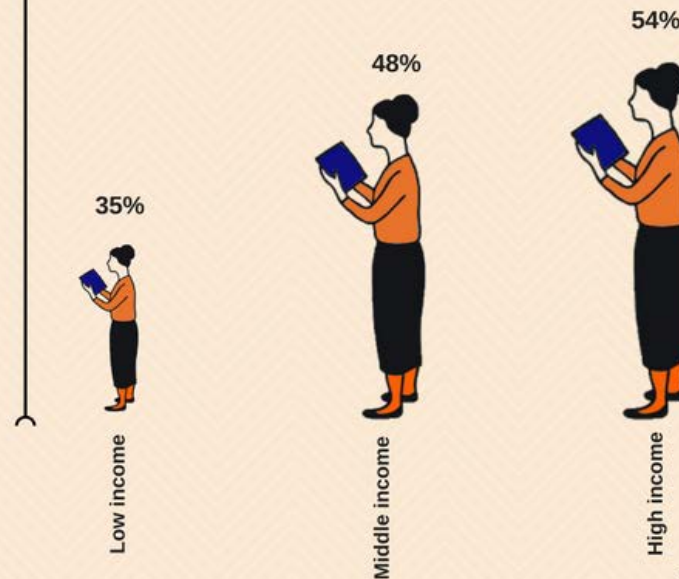


Source: UIS database.

## Gender disparities in higher education are greatest in poorer countries

100%

Women made up 54% of students in high income countries, but only 35% in low income countries in 2014



## Women lag behind men in the most advanced degree programmes in higher education



46%



54%



More women than men enrol in higher education in the first place



48%



52%



Slightly more women than men enrol in master degree programmes



56%



44%



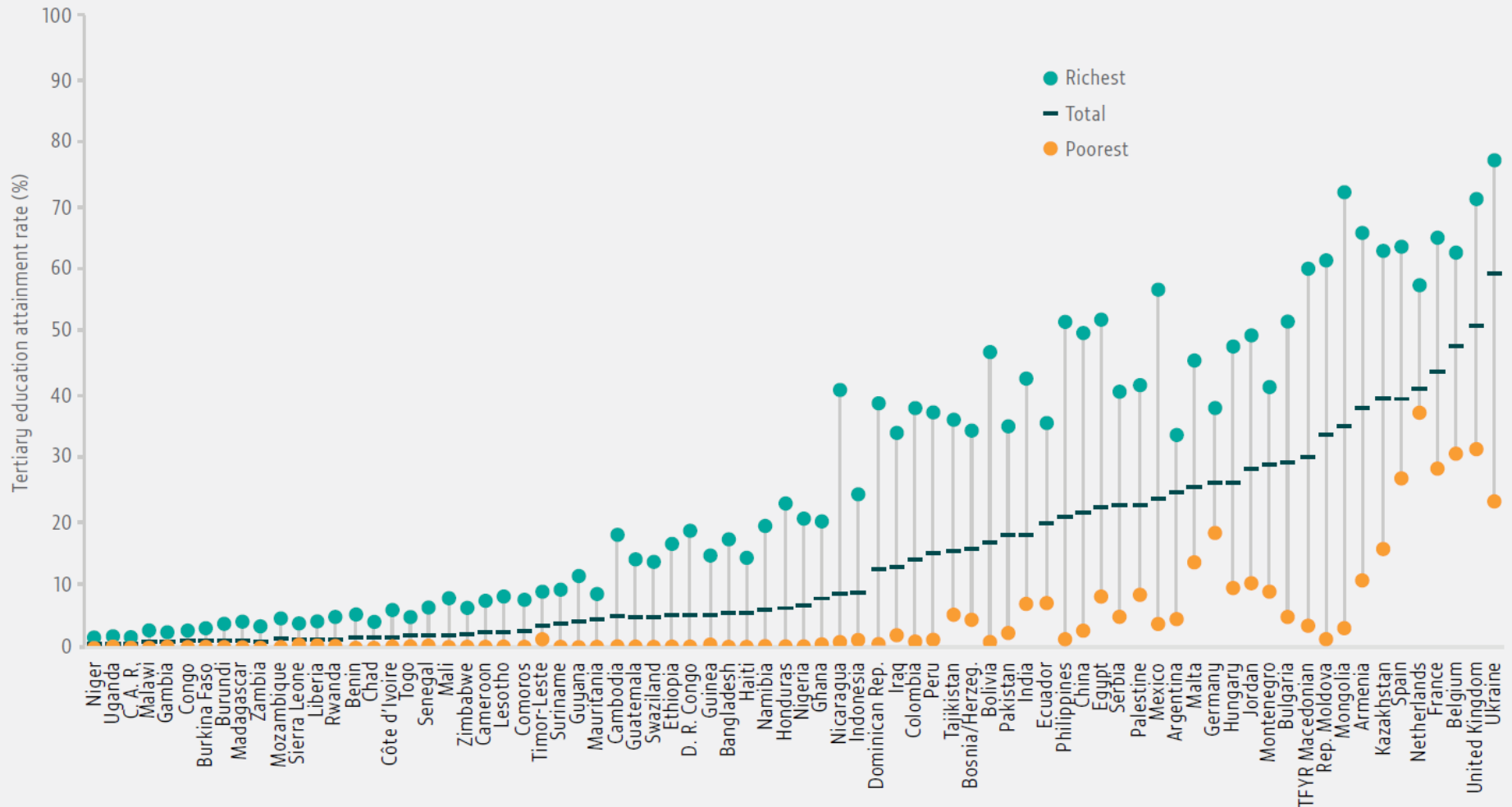
...but women lag behind men in the most advanced degree programmes

# There are major differences in tertiary attainment between the rich and the poor

**FIGURE 12.6:**

There are vast differences in tertiary attainment between the poor and the rich

Percentage of 25- to 29-year-olds who have completed at least four years of tertiary education, by wealth, selected countries, 2008-2014



Source: GEM Report team analysis of household survey data.

# Mapping access, affordability, and quality

**Globally, there are huge gaps between the rich and the poor in higher education**



Only 1% of the poorest complete at least 4 years of higher education



In the Philippines, the richest are 50 x more likely to have completed at least 4 years than the poorest.



In Mongolia, the richest are 24 x more likely to have completed at least 4 years than the poorest.

[Bit.ly/tertiaryed](https://bit.ly/tertiaryed)

#MindTheStudentGap



# Mapping access, affordability, and quality

## Disadvantaged and indigenous groups lag behind in higher education



Around 1/6 of Africans & Coloureds attend higher education in South Africa



...compared to around 1/2 of Whites & Indians



Only 1% of the indigenous population in Mexico goes to higher education



Youth living in rural areas in China are 7 x less likely to go to university than youth from urban areas

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Global Education Monitoring Report

## Private colleges and universities have grown to help cater for the growing pool of students



30% of students are enrolled in private institutions



This rises to at least 6 out of 10 students in eight countries in Latin America

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United Nations  
Educational, Scientific and  
Cultural Organization



International Institute  
for Educational Planning



Global Education  
Monitoring  
Report



# Build policies that work together to help the disadvantaged access higher education



Diversify entry requirements to recognise individual circumstances



Pass legislation and enforce it



Create special universities for disadvantaged groups



Build more institutions where there are none

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## Governments can't keep pace with the fast growth of students, leaving households footing the bill

Across 26 European countries, households paid 15% of the cost of higher education in 2011

This rose to 46% in the USA, 52% in Japan and 55% in

Chile



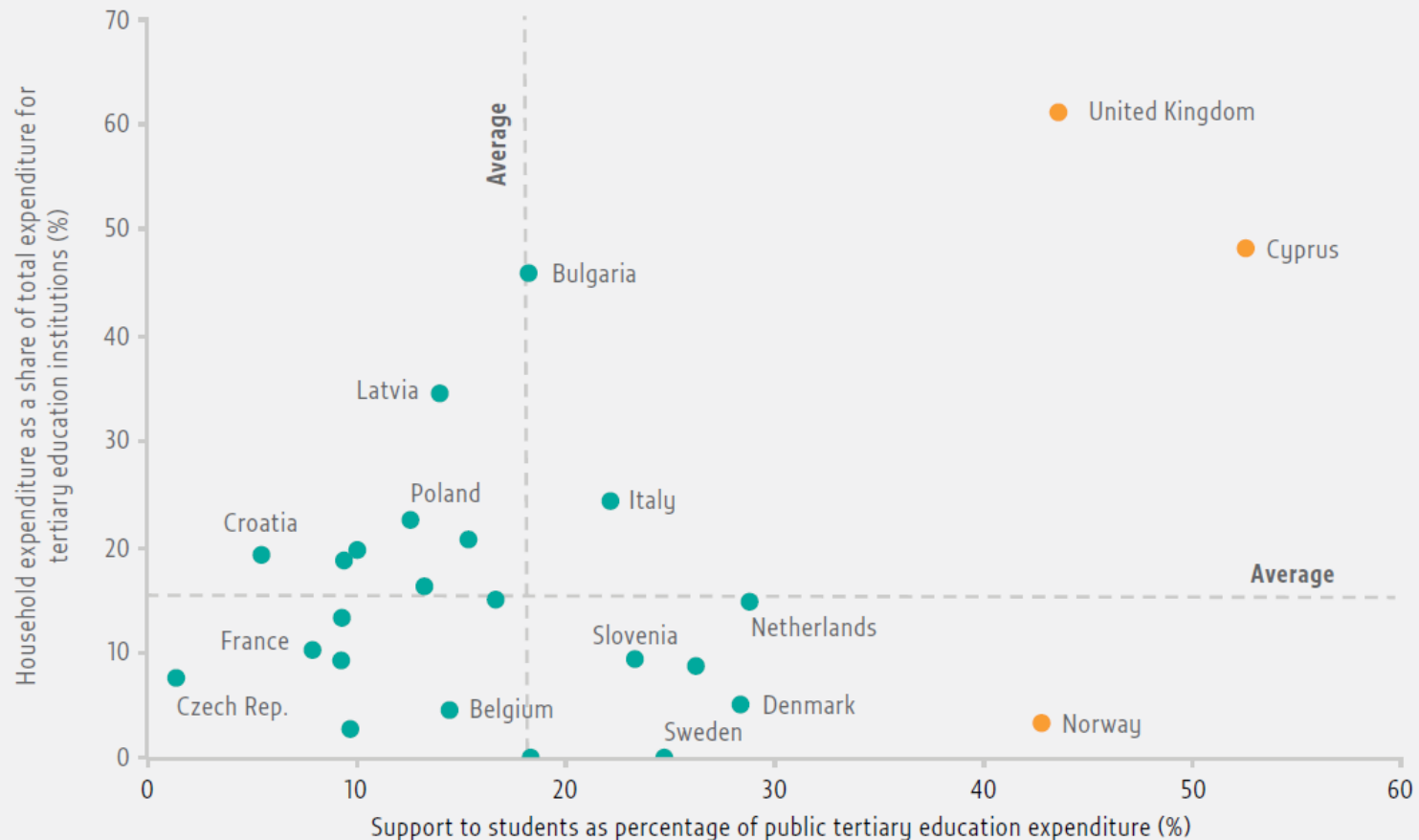
The cost of attending higher education in China for the poorest households is 187% their annual income

# There are diverse ways to approach affordability

**FIGURE 12.8:**

## There are diverse ways of making tertiary education affordable

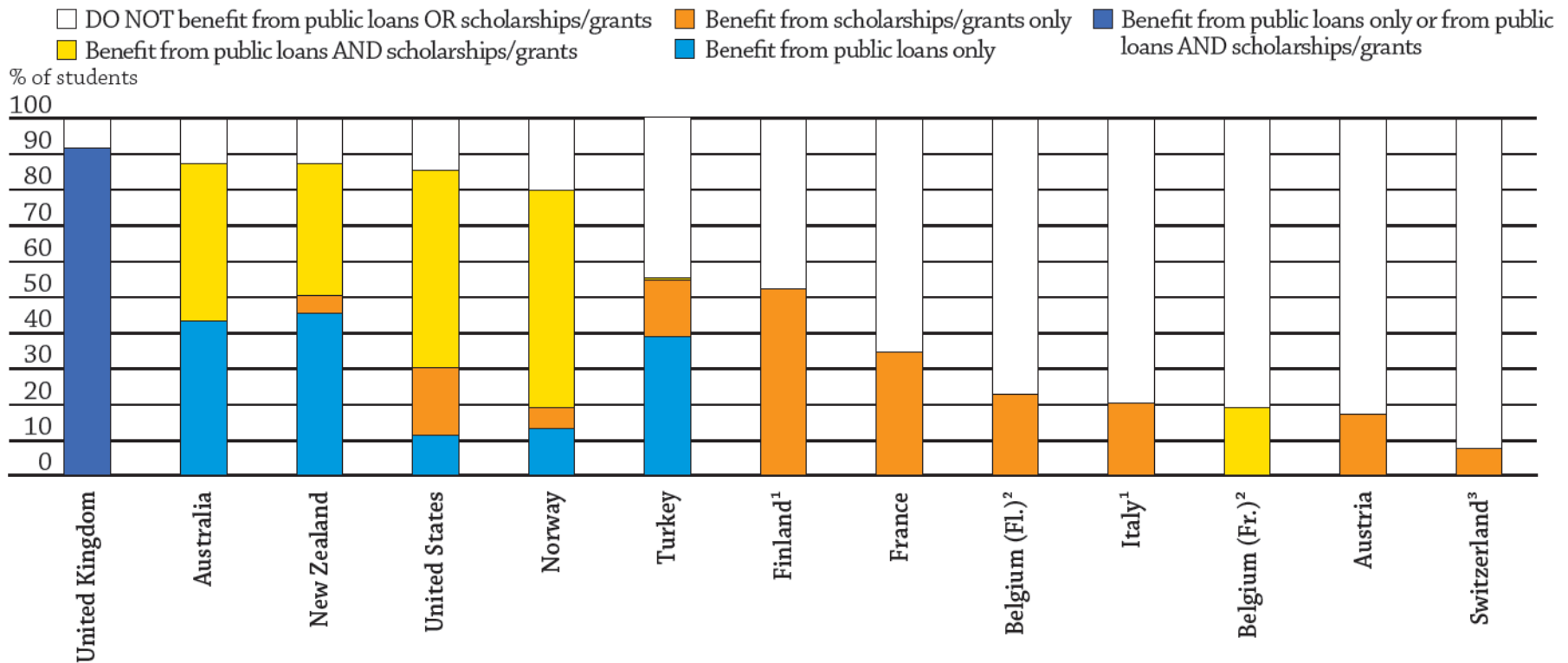
*Household expenditure as a share of total expenditure for higher education institutions and support to students enrolled in tertiary education as a percentage of public expenditure on tertiary education, selected countries, 2011*



Source: European Commission/EACEA/Eurydice (2015a).

# Distribution of scholarships and public loans

Figure 3. **Distribution of scholarships/grants and public loans to students at bachelor's or equivalent level (2013/14)**



1. Includes master, doctorate or equivalent levels.

2. Includes master or equivalent level.

3. Bachelor's or equivalent level includes short-cycle tertiary programmes.

Countries are ranked in descending order of the percentage of students receiving financial support for their studies.

Source: OECD (2015), *Education at a Glance 2015: OECD Indicators*, OECD Publishing, Paris, <http://dx.doi.org/10.1787/eag-2015-en>, Table B5.3.

# Defining policies for financial support is not simple

**FIGURE 4:**

Countries use means-tested grants and loans with different tuition strategies to broaden equitable access

*Forms of student financial assistance by tuition fee policy*

		Criterion of financial support							
		Means-tested		Other		Means-tested		Other	
<b>Financial support</b>	<b>Loans</b>	Bolivia P.S. Denmark Ghana Iceland Peru	Brazil Finland France Germany Mexico	Rwanda U.R. Tanzania	Australia England (UK) Ethiopia Namibia New Zealand	Malawi	Hungary Lithuania Russian Fed. Viet Nam	Hong Kong, China Japan Malaysia Thailand Turkey	Chile Colombia India Italy Mongolia Netherlands Portugal Singapore Thailand
	<b>Grants</b>	Argentina Austria Brazil France Germany Ireland Mexico Morocco Nigeria	Saudi Arabia	Australia England (UK) New Zealand		Croatia Czech Rep. Hungary Lithuania Romania Russian Fed. Viet Nam	Ukraine	India Indonesia Italy Mozambique Mongolia Netherlands Singapore	Malaysia
	<b>Grants and loans</b>	Norway Sweden				Kenya Pakistan Poland	Latvia	Burkina Faso Canada Chile China Colombia Rep. of Korea South Africa United States	
		<b>Free</b>		<b>Dual track</b>		<b>Deferred</b>		<b>Upfront</b>	
		<b>Tuition fees</b>							

**A combination of policies are needed to address equity in higher education; one size fits all will not work**



Low tuition fees



Need-based scholarships



Loans repayments based on income



can work together to make higher education affordable for all

Norway, Sweden, Kenya, Pakistan and Poland all use a combination of income-based approaches



[Bit.ly/tertiaryed](https://bit.ly/tertiaryed)

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# How to make higher education accessible and affordable for all

## Put it in law

Guarantee equity and affordability in regulatory frameworks

## Keep an eye on the target

Make sure those who need the most help are getting it

## Step up monitoring

Establish national agencies to ensure equal opportunities

## Provide varied student aid

Establish an agency to coordinate student aid

## Vary admissions criteria

Use different admissions criteria and affirmative action policies

## Limit student loan payments to <15%

Cap student loan repayment to <15% of their monthly income