Network of Experts in the Social Sciences of Education and training[1]

A smart social inclusion policy for the EU
the role of education and training

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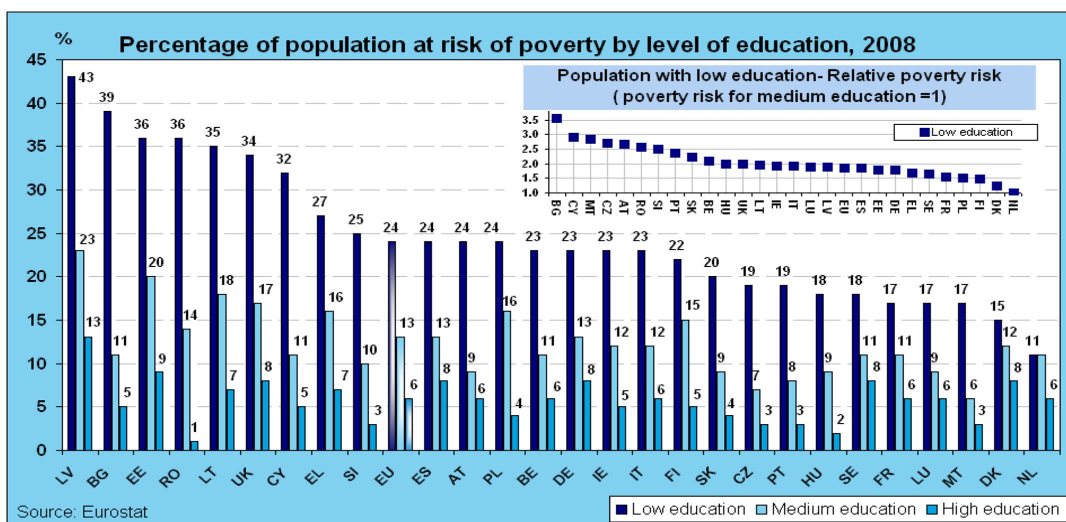
1 Education and the cycle of disadvantage

Despite sustained efforts to combat poverty at different levels of government (local, regional, national and EU-level), 84 million Europeans live in poverty today[3]. Unsurprisingly, there is a strong correlation between the poverty risk of households and the level of education of the household head (see figure 1 below): families with a low-educated head face a poverty risk which is twice that of families where the head has completed secondary education (24% versus 13% on average for the EU27); while the risk of the latter is twice that of families where the head has a diploma of higher education (13% versus 6%). The odds ratios are larger in the new Member States.

Figure 1.



Even more alarming is the fact that young people born and growing up in poverty have far lesser opportunities to benefit from education: although it should be perfectly possible to 'learn their way out of poverty', they have less access to good quality services in early childhood, they participate less in kindergarten, start primary school with more arrears, accumulate larger deficits throughout their education careers, are more often referred to special education, are systematically selected into lower-quality vocational tracks, and drop out more easily without any qualification. Empirical research for the EU has shown that children living in low income households, whose parents have low qualifications, are unemployed or are at risk of "in work poverty", who live in inadequate housing and in disadvantaged neighbourhoods, and/or who come from a migrant or ethnic minority background

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[3] Estimate based on the EU-definition of 'relative poverty', i.e. 60% of the median disposable income per consumption unit.

are much less likely to gain good qualifications themselves at school (Machin, 2006). In other words, child poverty and educational disadvantage tend to perpetuate a vicious cycle of marginalization.

During adulthood, socio-economic disadvantage continues to affect the odds of participation in further learning: individuals with low levels of initial education, unemployed or inactive adults, and ethnic minorities participate less in adult education across the board (Boateng, 2009). Catching up as adults appears to be difficult, as adult learning often builds on skills acquired during childhood and participation in adult education is strongly correlated with achievement in initial education. The OECD's Adult Literacy and Life skills survey revealed that adults with the highest literacy levels participate two to six times more in organized forms of adult learning than their low-literate counterparts. Similar inequalities were observed in 'active informal learning' (OECD & Statistics Canada, 2005: 84-94).

When trying to understand the causes of the educational disadvantage of people experiencing poverty or social exclusion, we can broadly distinguish between two sets of factors: unequal opportunities and unequal treatment.[4]

1.1 Unequal opportunities

The term 'unequal opportunities' refers to a set of causes that are exogenous to the education system. They relate to the living conditions of disadvantaged groups and are typically multidimensional (i.e. linked with material resources, health, cultural capital, etc. – see Nicaise, 2010 for an overview). Building on Bourdieu's extended concept of capital (Bourdieu and Passeron, 1970), we can summarise the wide variety of unequal opportunities in education as a lack of material, human, social and/or cultural capital in disadvantaged households:

- *Financial and material resources* remain indispensable, not just in higher and adult education, but also in order to cover the remaining school-related costs charged to parents in basic and secondary education (such as books, transportation and school excursions) and, perhaps more importantly, for the complementary investments that are generally expected from households at home: space and equipment (a quiet room to study, briefcase, laptop, internet connection…). The household's level of material comfort also has indirect effects on learning outcomes, as it determines the time-saving expenditure (such as a car, a dish-washer, domestic services) and, hence, the time that parents can afford to invest in supervising children's school work. Further, financial resources can be used for informal learning activities during leisure or holidays

[4] We abstract from socio-biological and cultural deficit theories of educational disadvantage, which have not vanished but have been seriously challenged in the scientific literature.

and, last but not least, to buy tutoring services outside the school if necessary. It is obvious that 'free education' is a quite elastic concept and that low-income students can be faced with serious obstacles in comparison with middle-class students. Evidence from the work of Wilkinson & Pickett (2009) and Dorling (2009) show clearly that the more equal a society is in terms of the distribution of wealth and income, the more equal opportunities are within education.

- *Human capital* includes the accumulated knowledge, skills and competences of the individual before entering a given education, but also his/her physical and psychological health. Underprivileged students often have some delay in their psychomotor development, a less healthy diet, problems relating to hygiene (due, for example, to poor housing or nutrition), a lower self-esteem, more anxiety, a greater risk of depression or hyper-activity. In the case of children, we should add to this the human capital of the parents who support them in their school career. In the case of adult learners, health problems of family members may affect the time available for learning. It is easy to understand the cumulative nature of disadvantage, as it simultaneously affects all household members, directly and/or indirectly. And as explained above, the human capital accumulated in initial education is itself an important asset determining the participation and success in further learning.

- Bourdieu's notion of *social capital* is multi-faceted and includes other meanings than just a dimension of unequal opportunities (see below, unequal treatment). In this context, we refer mainly to the quantifiable interpretation of individual's social capital as the access to support from family, peers, employers[5] and services. This includes the stability and security of the family relationships, the extensiveness and quality of friendships, access to support from colleagues or employers (very important in adult education) and access to services such as child care, homework clubs or tutoring. Ethnic minorities or socially excluded groups may be faced with very weak or indeed 'negative' types of social capital in the event of discrimination, bullying, broken family situations, unemployment or unstable jobs, frequent moves etc.

- A similar argument applies to *cultural capital*, which in Bourdieu's theory has quantitative and qualitative interpretations. From the point of view of unequal opportunities, the term is used to denote the 'amounts' of various types of cultural resources (books and audiovisual material, accumulated cultural experiences and competences etc.) available in the household. Some authors would include the educational level of parents and relatives as part of a young person's cultural capital. Cultural capital enhances the benefits of education

[5] The bulk of adult education is employment-related; in many cases employers encourage and finance participation in training.

because it links the formal learning processes at school with informal learning in the student's personal environment.

1.2 Unequal treatment / discrimination

The deprivation from various types of resources depicted above refers to *exogenous* causes of unequal school outcomes, linked with students and their environment: schools and education systems can try to compensate for these sources of inequality, but they are not held 'responsible' for them. However, focusing merely on unequal opportunities tells but half the story, because barriers within education systems and discriminatory behavior of teachers and schools against some minorities tend to reinforce unequal outcomes. For example, in selective schools or educational tracks, applicants from minority groups may fail more often in admission tests because the test batteries do not correctly measure their abilities (e.g. because of language barriers). Numerous examples in the literature show that children from low socio-economic status or immigrant backgrounds are disproportionately referred to special education or to vocational tracks in secondary education. In some countries, Roma children even attend school in a completely separate, lower-quality education system. The exclusion of girls (or indeed teachers) wearing headscarves, or non-delivery of obtained diplomas to students who have not paid their school debts are other examples of less subtle forms of discrimination. Discrimination and racist incidents against migrants, asylum seekers and ethnic minority students – the Roma in particular - are relatively well documented (EUMC, 2006; European Union Agency for Fundamental Rights, 2010: section 3.3).

The term discrimination applies in our view whenever unequal treatment of categories of students with specific social characteristics (such as gender, cultural, religious or socio-economic background) is not fully justified by educational motives. This includes situations where discrimination is unintended or indeed unconscious. Overt discrimination is sometimes attributable to abuse of power (e.g. when unfair sanctions are imposed on students) or pressure from a majority group (e.g. middle-class parents withdrawing their children from schools with an inflow of working-class or ethnic minority students), whereas the more subtle forms of discrimination are mostly due to prejudices or socially biased information (e.g. so-called Pygmalion effects,[6] or biased test scores). *Indirect* discrimination is defined in the literature as formally equal treatment which de facto produces a disadvantage for students who are faced with specific obstacles (e.g. relating to disability or language).

[6] The Pygmalion effect (referring to Greek mythology) denotes phenomena where teachers' (incorrect) *expectations* from students affect the behaviour of both parties and thus turns into a self-fulfilling prophecy. In the case of socially disadvantaged students, teachers often tend to underestimate their capabilities and therefore do not stimulate them enough, which results in underperformance.

Using a set of context, process and outcome indicators of equity in education for 25 EU countries, Baye et al. (2010) suggest that some education systems (such as the Belgian or German systems) tend to amplify social inequalities, whereas others (Sweden, Finland, Ireland) seem to attenuate them. In other words, the design of the education systems matters in understanding unequal educational outcomes. Therefore, in what follows, we will elaborate on the most 'structural' forms of unequal treatment at the macro-level (see also Field et al., 2007; Flecha, 2008):

- Comparative research (OECD, 2004; 2007; Duru-Bellat & Suchaut, 2005; Woessmann, 2009) has clearly shown that more *stratified education systems* generate more (socially) unequal outcomes. Stratification can take various forms such as grade repetition, selectivity in school admission, or (early) tracking. Extensive use of grade repetition usually affects vulnerable groups disproportionately, not only because of unequal opportunities but also because the tests used to determine whether students have acquired the necessary competences are almost always socially biased. Selectivity becomes more harmful when such tests are used to assign children to academic or vocational tracks – especially at younger ages: early tracking undeniably results in greater (social) inequality in outcomes by the end of secondary education.

- However, the most discriminatory form of tracking occurs when *biased IQ-tests* are used to refer socially disadvantaged or ethnic minority students to special education, which often represents a dead-end option rather than a remedy for such students (Powell, 2006). The correlation between socio-economic status or ethnic background and IQ-scores at the lower end of the distribution is often misinterpreted as low innate ability rather than the result of (reversible) social disadvantage or indeed a class-related screening instrument. In his theory of multiple intelligences, Howard Gardner (1983; 1999) has identified seven original key forms of knowledge and intelligence (linguistic, mathematical, etc.) which, according to Bourdieu (1996), are unequally distributed across social classes. It is mainly in linguistically based disciplines that the upper classes have a comparative advantage. A huge number of tests that select children in and out of schools are based on test verbal reasoning (the core element of IQ-type tests) and it is in these in particular that class (dis)advantage is very evident. Unlike mathematical skills, linguistic skills are taught extensively outside of schools. So indeed are other capabilities like music etc., in many countries.

- The *design of educational curricula* interacts with socially biased testing in enhancing unequal treatment. The orientation of students at secondary level is very much based on test results in language and maths and tends to disregard instrumental skills in which the lower classes have a comparative advantage. By the end of basic education, children from socially disadvantaged or minority backgrounds may have accumulated such deficits in verbal ability that it is

practically impossible for them to opt into general secondary education. If the curriculum in primary school had valued instrumental forms of knowledge better, it would have generated more equal success scores of lower-class pupils and may have led to more positive motivation and orientation (Litt, 1980). This applies all the more in systems with early tracking, such as in conservative welfare regimes (Germany, Austria, Belgium, The Netherlands).

- It is generally acknowledged that weak learners – including those from low socio-economic backgrounds -benefit more from mixed than from segregated schools, thanks to the presence of stronger, middle-class students. This is the well-known 'peer group effect'.[7] Although the implied 'loss' for the latter is minimal, middle- and upper-class families tend to avoid mixed schools, especially in countries with free school choice. Indeed, quasi-market mechanisms boost *segregation* and thus indirectly amplify unequal outcomes (for an overview of this issue, see Littré et al., 2010; Flecha, 2008).

1.3 Adult education and training: less studied, same problems?

The bulk of the literature on educational inequality relates to initial education. Much less is known about the education and training of adults. The 2006-2007 Adult Education Survey is the first comparative and representative dataset concerning *adult learning* at the level of the EU25, and its exploitation is still ongoing (Boateng, 2009). Important insights into inequalities in adult skills have also been gained through the International Adult Literacy Study (OECD & Statistics Canada, 2000) and the Adult Literacy and Life Skills survey (OECD & Statistics Canada, 2005). Whereas the strong correlation between socio-economic status and initial educational attainment on the one hand, and participation in adult learning on the other hand is now well documented, there is still a great need for deeper analysis of the system characteristics that determine inequalities in participation. Drawing on several existing sources, Desjardins et al. (2006) conclude that these inequalities can be largely attributed to market failures. The bulk of investment in adult learning occurs by individuals and employers. Whereas individuals are faced with unequal financial and time constraints, unequal information and learning skills, employers tend to prioritise investments in more skilled workers because they believe that the return on investment is higher among these workers. Both parties are faced with risks that may be higher among low-skilled workers (unemployment, turnover). Moreover, disadvantaged groups need relatively more general education and training (including life skills and social skills) which are not typically covered by employer-funded provision. Unsurprisingly, government-funded education and training

[7] Recent research (e.g. Dronkers, 2010) adds some qualification by distinguishing between 'degree of segregation' and 'diversity of the school population' without really challenging the general finding reflected in the text.

programmes (either through direct provision or through subsidized initiatives of the voluntary sector) display much more equality in participation. Desjardins et al. therefore advocate stronger government intervention, with targeted measures and holistic approaches. Other studies suggest (a) that longer and more comprehensive initial education prepares young people better for lifelong learning; (b) that trade unions and active labour market policies and generous unemployment benefits play a positive role in fostering participation among vulnerable groups; and (c) that the design of adult education itself (e.g. recognition of prior learning, flexible organization, supporting services, active teaching and learning methods) makes a big difference in attracting learners. These findings indicate again that the institutional context of adult education and training matters significantly (Groenez et al., 2007; OECD, 2005).

Many economists would argue that compensatory education and training programmes for disadvantaged groups of adults tend to be less efficient than those for stronger groups and, consequently, that government efforts to redistribute opportunities should be concentrated in early childhood (see Woessmann & Schütz, 2006 for a critical discussion). The latest review by Cunha and Heckman (2010) is much more cautious, advocating tailored approaches for different configurations of disadvantage. While recognizing the value of their interdisciplinary approach, combining psychology and economics, we believe that the Cunha-Heckman model implicitly assumes that education and training systems operate efficiently at their 'production possibility frontier'. In line with Desjardins et al. (2006), we believe that, in reality, adult education and training systems are often of poor quality because they are underdeveloped. Information about learning processes and outcomes is blurred and the evidence base remains too patchy to draw any conclusions. For example, what evidence is there of the effectiveness of adult literacy courses – let alone, of transitions into further education and training? Has there been any attempt to evaluate the quality of provision? As regards labour market training for disadvantaged groups, have evaluators used adequate criteria to measure the added value of programmes?

Part of the market failure referred to above is caused by this lack of information. Incentives, evaluation criteria and the ensuing behaviour of providers tend to be based on superficial output measures, rather than genuine 'value added'. This results in a considerable bias in favour of better-off applicants, creaming and discrimination – very much in the same way as in selective initial education systems (Nicaise, 2000b).

To sum up, unequal opportunities exist to a greater or lesser degree in all countries and at all levels of education, depending on the degree of inequality in society at large. However, some education and training systems tend to reinforce these inequalities through unequal treatment, while others succeed in mitigating them. In

order to reduce social exclusion, it is therefore necessary to tackle the causes of reproduction on both sides. Before discussing concrete strategies, we want to look at the macro-picture of EU policy and assess the overall role of education as a tool to combat social exclusion in the knowledge-based society.

2. The macro picture: education and training as a leverage for social inclusion in the knowledge-based society

During their 2000 Spring Summit in Lisbon, European leaders agreed on a common growth strategy that would build on knowledge as a key asset in global competition. *'Making the EU the most dynamic and competitive knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion'.* The new 'Europe 2020' strategy, adopted in the Spring of 2010, essentially continues along the same lines, under the motto '*a smart, sustainable and inclusive growth*'. Yet the link between the knowledge-based society and social inclusion has never been thoroughly discussed. Evaluation reports suggest that the Lisbon paradigm should be interpreted primarily as a linear line of reasoning: the knowledge-based economy should make the EU more competitive and therefore generate more economic growth; that growth in turn should translate into higher employment, and thus less poverty.

In our view, some of the links in this line of reasoning are less clear-cut than others. For example, there is a reasonable degree of certainty about the positive impact of investments in knowledge on economic growth; both the generation of knowledge (through research and development) and its dissemination (chiefly through education, but also by the media and via the Internet) bring about economic growth. But to what extent does this growth translate into employment, and above all, how is that employment distributed? The dominant pattern appears to be one of 'skill-biased technological growth', Which means that technological innovations boost the demand for better-skilled jobs in particular, while low-skilled jobs are displaced and either disappear or sink lower on the status and pay ladder. This *raises* inequality on the labour market rather than reducing it. In other words, the knowledge-based society entails a risk of plunging *more* people (mainly the low-skilled) into poverty.

Empirical research into trends in inequality produces an overall picture of growing income inequality in the EU (OECD, 2008), a trend that actually started in the 1980s. The inequality in *individual labour incomes* has in fact risen significantly more than the inequality in *total household incomes*, due partly to widening wage gaps and partly to an increase in atypical employment, especially among the low-skilled (part-time work, temporary work, etc.)[8]. This suggests that labour markets in the EU have

[8] The growing inequality in individual labour incomes is partially compensated for at household level by increased labour participation by several family members. This is highly problematic as it ignores the

indeed undergone a radical shift towards more *knowledge-intensive* services (Gottschalk & Smeeding, 1997; Katz & Autor, 1999; Gregory & Russo, 2005). The recent prospective analysis of labour market trends, carried out by Cedefop (2008), shows that this trend is likely to continue in the next 20 years, resulting in further imbalances at the expense of low-skilled workers.

This critical observation does not mean that the knowledge-based society is per se harmful for social cohesion and social inclusion. It just necessitates an appropriate policy mix, with a better balance between *knowledge-intensive* (as depicted above) and *knowledge-extensive* policies. The latter focus on the dissemination of knowledge and its distribution among the population. They concentrate on investments in education and training, especially at the bottom of the education ladder. The dissemination of knowledge through education and training is equally favourable for economic growth, but not at the expense of greater inequality, because they operate at the supply side of the labour market. Education and training transform unskilled into skilled labour, reducing the labour supply at the bottom of the ladder whilst increasing the supply in the higher-skilled segments. In this way, the supply of labour is better able to track the trends in demand, and consequently, the employment rate and pay levels of vulnerable groups can be maintained at decent levels, reducing the risk of poverty. This all means that education and training are becoming a cornerstone of social policy in the knowledge-based society: social inclusion will fail or succeed, depending on the commitment of the EU and its Member States to investing in the human capital of all citizens. The Council conclusions of 11 May 2010 on the social dimension of education and training are a significant signal in this direction (Council of the EU, 2010).

3. How far do we want to go? Societal views, objectives and instruments

There is a wide variety of strategies to tackle social exclusion in education. Rather than a lack of knowledge, it is disagreement on the definition of equality objectives that prevents societies from achieving truly inclusive education systems.

The theoretical literature on equality in education (see e.g. Demeuse & Baye, 2005) mostly distinguishes between *three* sources of inequality at the individual level:

- unequal '*talents'* (mostly interpreted as genetic endowments), which are considered unalterable and therefore 'accepted'. Many researchers have assumed that talents are distributed at random across all social groups, and

household costs in having several family members working most especially in terms of child care. In lone parents families (those most of risk of poverty in many EU countries), it is not an option.

are therefore less relevant to the debate on social inequality. However, growing evidence about the 'malleability' of talents and their actual correlation with social background has challenged this view;

- unequal *effort* or *preferences*, which refer to the responsibility of the individual;
- unequal *opportunities*, i.e. differences in material and cultural resources, social support etc.: such inequalities are exogenous to the education system but affect the chances of students.

Curiously, the *fourth* and probably most important source of inequality (unequal *treatment)*, discussed in section 1, has often been overlooked in the literature (Brighouse, 2000). Lynch & Baker (2005) adopt a much more interactive viewpoint and add inequalities in power, respect and recognition, love, care and solidarity to the picture.

Depending of the views held by the majority of citizens, policies to combat social exclusion in education will be more or less far-reaching. The '*meritocratic'* view, which dominates in many EU countries, rejects unequal opportunities but tends to accept or indeed nurture unequal talents and achievement: the culture of 'merit' (defined as the combination of personal effort and talents) is used to justify selective schools and streaming in secondary education and thus reinforces inequalities. On the opposite side, the *egalitarian* view links the right to education to human dignity, irrespective of talents, and therefore even advocates the use of positive discrimination to compensate for inequalities at the start (Nicaise, 2010; Lynch and Baker, 2005).

Generally speaking, three sets of strategies can be distinguished to tackle (social) inequalities:

- strategies for more *equal opportunities* are supported by meritocrats as well as egalitarians. They aim at bridging the differences in material, social, cultural and human resources between students from different socio-economic backgrounds. The most typical example is *multiservice schools*, which offer a variety of services (school library, internet classes, theatre, sports, homework clubs, etc.) in addition to regular teaching activities (Cummings, Dyson & Todd, forthcoming). When appropriately designed and monitored, such services help disadvantaged students who lack this kind of support to keep pace with other students. Community schools are a variant of multiservice schools that empower local communities to participate actively in the management as well as the learning process (Flecha, 2008). *Early childhood* education programmes moreover target these children at preschool age so as to prevent the accumulation of deficits. They are generally considered as the most efficient type of pro-poor education

strategy (Penn, 2009). Nevertheless, equal opportunity strategies are criticized for focusing too exclusively on the boundary conditions and ignoring all sort of endogenous barriers within the education system as such.

- strategies for more *equal treatment* are very complementary, as they focus on removing barriers and combating discrimination. On the micro-level, it is important to improve the mutual understanding between teachers and students, between schools and parents, and between students from different backgrounds. For example, *school-community work* encourages groups of parents from minorities or deprived neighbourhoods to express their expectations from schools collectively, while at the same time sensitizing teachers about the living conditions and cultural differences in education patterns. Mutual understanding between teachers and parents is essential, not only to enhance the effectiveness of teaching (making it more experience-based, tailored to the interests and needs of difficult learners and less culturally biased) but also to raise the mutual respect and 'emotional support' between all parties (Wilson, Riddell & Tisdall, 2000a).

  Intercultural and *experience-based* education bridge the gap between school and home within the school pedagogy. *Bilingual education* aims to help young children master basic concepts in their mother tongue before exposing them fully to the majority language as instruction language (Blaton et al., 2010).

  On the macro-level, segregation (i.e. the co-existence of elite and ghetto schools) is probably one of the most severe forms of discrimination. *De-segregation* may require legal instruments such as anti-discrimination clauses in registration procedures, or indeed quota systems (such as Affirmative Action in the USA) in the distribution of students across schools.

  At the meso level, 'magnet schools' in inner cities implement powerful learning environments by investing in arts education, ICT or technology projects. In this way, a renewed interest from students and commitment from teachers have been encouraged. The positive impact of such projects, combined with a smart marketing strategy, have proved to be successful in attracting 'white middle-class' students so as to achieve a better social mix at school (see Littré et al., 2010)[9].

  Inclusive and *comprehensive* education aim to avoid the segregation effects of separate school curricula: all students are kept, as far as possible, within a

[9] However, De Sena and Anslone point to the risk that privileged families may use such schools to their own advantage and displace disadvantaged students.

broad mainstream curriculum for as long as possible, keeping in mind that comprehensive education leads to more equal outcomes in the longer run (Wilson, Riddell & Tisdall, 2000b; Demeuse et al., 2010).

Strategies for *more equal outcomes* move a step further: they explicitly allow for preferential treatment of minority groups, so as to compensate for their initial disadvantage. Affirmative Action in the USA has been highly controversial, as priority admission of minority students appeared to occur at the expense of majority students with better scores on admission tests in selective schools. A softer form of positive discrimination is *educational priority funding*, which provides for additional subsidies to schools with a more disadvantaged audience. The empirical evaluation research is not very convincing about the effectiveness of the existing priority funding mechanisms. Positive net outcomes have been signalled, but it seems that schools need guidance and clear guidelines in order to spend their additional resources in the most efficient way (Demeuse et al., 2008). On the micro-level, positive discrimination translates into differentiation within the classroom. Here again, evaluation studies suggest that not all forms of differentiation are equally successful in achieving more equal outcomes. Curriculum differentiation, pull-out programmes and student-driven teaching appear to yield mixed results. The example of 'Success for All' in the USA shows, however, that a well-designed and flexibly organized differentiation of inputs can dramatically improve the chances of children from the most disadvantaged backgrounds (Slavin & Madden, 2001; Vanderhoeven, 2010).

Summing up, there is a wide variety of strategies to tackle social exclusion within education. It seems to us that it would be unwise to try and rank them by order of effectiveness, because they are actually mutually complementary. One may argue that the simultaneous implementation of all strategies will yield the best results. However, depending on the democratic choices of the majority of citizens, some countries will probably opt to move further ahead than others. It is therefore desirable to make the options as explicit as possible and to maximize the electoral support for any selected policy mix.

4. What the EU does, and what it can do

Following up on the first integrated EU strategy for education and training (ET 2010), the Council adopted, in May 2009, a new strategic framework called ET 2020. Like its predecessor, the framework includes a specific objective relating to equity, stating that "*Education and training policy should enable all citizens, irrespective of their personal, social or economic circumstances, to acquire, update and develop over a lifetime both job-specific skills and the key competences needed for their employability and to foster further learning, active citizenship and intercultural dialogue. Educational disadvantage should be addressed by providing high quality early childhood education and targeted support, and by promoting inclusive education. Education and training systems should aim to ensure that all learners — including those from disadvantaged backgrounds, those with special needs and migrants — complete their education, including, where appropriate, through second chance education and the provision of more personalised learning. Education should promote intercultural competences, democratic values and respect for fundamental rights and the environment, as well as combat all forms of discrimination, equipping all young people to interact positively with their peers from diverse backgrounds*." The framework document proposes to strengthen the Open Method of Coordination (OMC) in the field of education, along principles that look very similar to the social OMC, with three-year programmes focusing on particular common priority areas[10], national reports and joint reports. It also sets benchmarks[11] in five areas (early childhood education, minimum skills in reading, maths and science among 15 year olds, early school leaving, proportion of youngsters graduating from tertiary education and adults participating in lifelong learning).

In the mean time, the Europe 2020 blueprint (updating the Lisbon Strategy for the next decennium) announces a flagship programme ('Youth on the move' - to be defined further) and a headline target aimed at reducing early school leaving in the EU from over 14% to less than 10% by 2020. The Council of May 2010 has more explicitly addressed the role of education and training (E&T) in fostering social inclusion and pinpointed a detailed set of suggestions to the Member States as well as the Commission, at all levels, ranging from early childhood to higher and adult education. The Council also invites them to make active use of the Structural Funds as well as the Lifelong Learning and the Progress programmes for the implementation of socially inclusive education measures. It is obvious that a comprehensive set of measures and instruments have been identified for this purpose.

[10] For the 2009-2011 period, those priorities include the reduction of early school leaving, the promotion of pre-primary education, education of immigrant children and inclusive education for children with special needs.

[11] not to be interpreted as targets at national level.

Two perspectives stand out as particularly promising in these policy papers: the strengthening of the OMC in the field of education and training and the integration of the headline target on early school leaving in the Europe 2020 strategy.

Despite its merits in fostering convergence between education and training systems and modernization of systems in the new Member States (Alexiadou et al., 2010), it must be admitted that the *OMC in E&T* has been rather soft until now – softer indeed than the OMC in the fields of employment, social inclusion, pensions and health care. Targets were set but not implemented, and there was no system of feedback based on (specific) national strategy reports. The lifelong learning components of the national Lisbon reform programmes were insufficient and not focused on equity – let alone, social inclusion. The peer reviewing was mainly confined to good practice and not all stakeholders were involved. The cross-sectoral co-ordination between education and social affairs was weak, including at the level of the Commission and, as could be seen in section 3, even within the concept of the Lisbon strategy. In our view, a more effective and socially inclusive OMC in the future should build on the following principles:

- *integration of the OMC* in E&T with all other fields of social policy. The three-year cycles, with national and joint reports, should allow for a quick convergence of procedures. An integrated reporting through 'national strategy reports' does not exclude specific and detailed chapters on sectoral policies, it just ensures better coherence across sectors – including between E&T and social inclusion;

- transformation of the 'benchmarks' into genuine *targets*, with a yearly follow-up and a bilateral feedback procedure. A differentiated set of targets per Member State is acceptable, given the diverging state of affairs across countries. What matters is that targets and achievements converge over time.

- The *peer learning activities* facilitated by the Commission can be held on two levels:
    - the level of practitioners, focusing on innovative modes of school organization (such as multilevel schools, community schools, intercultural education, alternative method schools, family learning, two-generation literacy projects etc.) with the aim of disseminating good practice; and
    - the level of policy makers, focusing on structural reforms (e.g. early childhood provision, comprehensive education, desegregation, inclusive education etc.) to assist member states in making their education systems more equitable.

The peer reviews should have a stronger impact. Their format can be informed by the procedure in the social field, with an emphasis on strategic aspects, with thematic experts giving their critical assessment of the national policies, feedback from all participating countries on the transferability and participation of a wider range of stakeholders (including grassroots and advocacy organizations in the seminars. It is also important to monitor and evaluate the impact of these peer learning activities on a regular basis, so as to maximize the benefit of the programme.

- The *headline target* concerning the reduction of early school leaving (ESL) should be integrated with the equity objective of the Lifelong Learning programme. It should cover preventative as well as remedial strategies, and it should be appropriately resourced.

- It is as yet unclear what role the *flagship programme* 'Youth on the move' (which was initially aimed to foster international mobility of students) can play in this regard: a thorough reflection is desirable as to how the programme can contribute to the achievement of the headline target.

- The *Structural Funds* can play a very important role in this context. Whereas in the past specific quota were allocated to measures targeted at disadvantaged groups, the equity principle should actually be pervasive in all actions co-financed by the Funds. This means that the allocation of resources should be positively correlated with the degree of disadvantage of beneficiaries. In principle, generic measures with an obvious economic return do not necessitate co-financing except in poorer regions. On the other hand, the interventions of the Structural Funds should not be confined to vocational education and training: general education (including at preschool and primary level) is always to some extent an investment in the future employability of young people.

- *Stronger legal instruments* should be used in this field, despite the fact that the OMC is essentially based on soft law. As in the field of social inclusion, recommendations can be made by the Commission to underpin a more active monitoring in the Member States.

The issue of legal instruments reaches beyond the scope of the OMC. The integration of the right to education and training for all EU citizens into the Treaty may allow for an extension of anti-discrimination legislation in the field of E&T. Given the persistence of discriminatory practice in many forms within the field of education, an EU-wide legal framework may mean a major step forward.

Last but not least, the mainstreaming of social inclusion in education and training policies implies that common EU policies should also be subject to critical scrutiny of their inclusiveness. Generally speaking, European E&T policies aim to promote transnational mobility of learners, teachers and workers. Convergence of national systems in the context of the Bologna and Copenhagen processes, as well as the promotion of mobility itself, unavoidably involve some degree of 'marketisation' of education and training. Increased exposure to transnational competition may obviously boost the quality and efficiency of E&T systems, but may also lead to creaming and exclusion of disadvantaged learners. It is essential for the EU to watch over such potentially harmful side-effects, for example, through systematic use of social impact assessment and appropriate regulations to guarantee equal benefit from EU actions to all citizens.

As regards the nature of the strategies fostered at EU level, several priorities have already been put forward in the policy documents discussed above:

- in its Communication on efficiency and equity in European E&T systems (European Commission, 2006) the Commission rightly emphasized that *early childhood* programmes generally combine positive outcomes in terms of equal opportunities and social return on investment. Of course, for such programmes to benefit the most vulnerable groups, a series of conditions need to be fulfilled: child care and preschools must be accessible at the lowest possible price, and must cater for the specific needs of disadvantaged children; staff must have the intercultural competences needed to make the services attractive for immigrant families; parents need to be involved as far as possible, and a comprehensive, multidimensional approach is needed. This means that the quantitative benchmarks in this area should be accompanied by *quality standards*.

- The Commission's Green Paper on *migration* and mobility in education addresses, in addition to pre-school education, language learning, educational support such as mentoring and tutoring, intercultural education, specific teacher training as well as partnerships with families and communities (European Commission, 2008). Preventing segregation and desegregating ghetto schools is strongly emphasized as a key condition for genuine integration. The Commission also calls for a revision of Directive 77/486/CEE, which established the right to free education, local language as well as mother tongue education for immigrant children. Whereas this Directive concerned migrant children from EU countries, the question arises whether it should be extended to children from third countries. A further question is whether anti-discrimination laws in the field of education can be strengthened: EU legislation is a potentially powerful tool for equal

treatment strategies – for immigrants as well as ethnic minorities (e.g. Roma children) and other vulnerable groups.

- As indicated in section 1, another form of segregation affects children with disabilities. Whereas special education was initially developed to ensure access to adequate educational provision for disabled children (and thus to achieve a universal right to education), it has become increasingly obvious that segregated schools also produce adverse effects such as social isolation, stigma, lowering of learning standards and dead end careers. Since the Declaration of Salamanca (1994) and the UN Convention of the Rights of Persons with Disabilities (2006), the implementation of the right to *inclusive education* (i.e. in mainstream schools, whenever possible), has appeared on the European policy agenda(s) too. It is important to keep in mind that, due to the human damage of deprivation, many socially disadvantaged and ethnic minority children get stigmatized as 'disabled' and segregated into special schools where they do not belong. The inclusive education agenda is therefore a joint interest between disabled and socially excluded students. Here, too, the strengthening of European anti-discrimination legislation in the field of education would spur progress to fairer treatment.

- The reduction of *early school leaving* (ESL) to less than 10% in the EU has become a headline target in the Europe 2020 strategy. In the light of past experience, in the context of the Lisbon Strategy, the Commission has acknowledged that current efforts of the Member States are insufficient. The general principles are clear. Firstly, as it is obvious that ESL is intimately linked with social disadvantage, cross-sectoral policies involving education, social work, youth, employment and social protection are indispensable. This principle provides another strong argument for stronger integration of the OMC in the field of education with the so-called 'social OMC'. Secondly, early school leaving varies widely across countries, which suggests that national education systems play a part in tempering or exacerbating the problem. Whereas policies to address early school leaving should certainly include targeted measures, they should equally include system reforms that reduce stratification, disenchantment and exclusion of vulnerable groups. And thirdly, a comprehensive approach necessitates preventive as well as curative measures. Research has shown that the risks of ESL (at individual level) are quite predictable as a function of social background characteristics, suggesting that early and targeted intervention can effectively prevent dropout.

  As ESL is at the same time a major cause of skills mismatch, unemployment and social exclusion, programmes to tackle the problem deserve to be ranked among the top priorities of the EU's structural funds. As the EU has

only subsidiary competencies in the field of education, hard measures (such as sanctions imposed on countries that do not reach targets), co-financing by the structural funds may serve as a positive incentive, if adequately linked to system reforms. A major strength of the structural funds is the systematic use of monitoring and evaluation of the effectiveness of co-financed measures.

Further, a specific EU (sub)programme (as a bridge between the two flagship initiatives 'Youth on the move' and the 'EU Platform against poverty') may boost innovation and foster dissemination of best practice.

One of the potential innovations to be considered by Member States is the replacement of their legal school leaving age with a mandatory qualification threshold to be obtained by each young person before leaving school. Of course, this obligation should go in pair with a legal guarantee of fair treatment, free choice and adequate support up to that level (including obligations on the part of schools and the social sector). The Nordic countries have already moved somewhat into that direction, by developing learnfare systems[12] for unemployed early school leavers.

- Finally, in *adult education and training*, the Council conclusions of 11 May 2010 on the social dimension of E&T have clearly formulated the general objectives. Current efforts to improve access to - and equity of provision can be stepped up, both in the Lifelong Learning Programme and the programmes co-financed by the European structural funds. Framing these efforts in a genuine OMC with a strong focus on social inclusion will naturally lead to more comprehensive national strategies, including system reforms responding to the research findings in section 1. In concrete terms, the strategic options range from more comprehensive initial education to more active labour market policies, stronger government intervention in adult E&T, priority measures for excluded groups in adult E&T provision, measures to make adult learning more attractive, and social bargaining agreements about the redistribution of opportunities in favour of vulnerable workers. The EU's own policies to develop a European E&T area, as well as interventions of the structural funds should themselves be accompanied with measures to guarantee the right to E&T for all citizens, including priority funding schemes.

[12] Learnfare systems combine welfare benefits with activation towards education or training programmes.

5. Conclusions

The role of education and training as a cornerstone for a smarter, more prosperous as well as more inclusive Europe cannot be overestimated. As suggested in section 2, the simultaneous achievement of economic growth and social cohesion crucially depends on the strength and nature of common education and training policies. Recognising the failure of the Lisbon Strategy to reconcile both objectives is a first step towards a smarter strategy for the future. The key to this smarter strategy is massive investment in education, especially in basic skills. The power of E&T policies resides in the fact that they have a distributive as well as a multiplicative impact[13]: raising the competences of socially excluded people empowers them to escape poverty in a sustainable way, while at the same time expanding the productive resources for our welfare societies. A recent OECD report estimated that '*bringing all students to a level of minimal proficiency for the OECD (i.e. a PISA score of 400) would imply GDP increases of close to USD 200 trillion'* (Hanushek and Woessmann, 2010:6).

At the same time, the existing research suggests that both the fairness and the efficiency of education systems can be significantly improved by pulling down barriers in E&T systems. Millions of talented children and adults are currently denied access to adequate education provision, not just because their own material, human, social and cultural resources are too limited, but equally because of unfair treatment. Our analysis has shown that concepts such as equity, fairness etc. have diverging interpretations in different ideologies. However, the human rights perspective may help in reaching a consensus that the 'right to learn' is intimately linked with human dignity (and therefore rather absolute), irrespective of social background, ethnicity or indeed (perceived) talents. Now that fundamental social rights have been enshrined in the European Treaty, the time may be ripe for more courageous and visionary reforms in E&T systems.

[13] Education is also a 'non-exclusive' good, i.e. its use by one person does not reduce its benefit for others. Put differently, educational policy is not a zero-sum game that necessarily harms the better-off when targeting excluded groups.

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