Equity and Inclusion in Education

FINDING STRENGTH THROUGH DIVERSITY



OECD

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Foreword

Governments and education policy makers are increasingly concerned with equity and inclusion in education due to several major global trends such as demographic shifts, migration and refugee crises, rising inequalities, and climate change. These developments have contributed to increasing diversity and warrant an examination of the impact of diversity on equity and inclusion in education.

Over the past four years, the OECD Strength through Diversity Project has developed a rich evidence-base to help countries identify and support the needs of diverse students and promote more equitable and inclusive education systems.

The OECD, with its Strength through Diversity Project, stands ready to support countries in developing and implementing policies for more equitable and inclusive education systems. This not only can benefit diverse students, but support all individuals to engage constructively with others in increasingly diverse and complex societies.

The report synthesises the main findings of the Strength through Diversity Project that have emerged through its analytical, country-specific and peer-learning work in Phase II (2019-22). It presents a holistic framework for studying diversity, equity and inclusion in education, examines five key policy areas (i.e., governance; resourcing; capacity building; school-level interventions, and monitoring and evaluation), provides examples of good policies and practices, and offers policy advice on promoting more equitable and inclusive education systems.

The development of this report was guided by Andreas Schleicher and Paulo Santiago and was overseen by the Education Policy Committee. The authors of this report are Lucie Cerna (co-ordinator), Cecilia Mezzanotte and Samo Varsik of the OECD Directorate for Education and Skills, and Sarah Jameson of TUAC (previously with the Directorate for Education and Skills).

Daiana Torres Lima was responsible for the production and layout of the report. Della Shin prepared the cover page of the report. Valuable comments on draft chapters were provided by members of the OECD Secretariat (in particular Paulo Santiago and Luka Boeskens) and members of the Education Policy Committee. The team of authors is grateful to individual experts who contributed to the country-specific reviews on equity and inclusion in education, whose expertise and analysis have fed into this report (including Mel Ainscow, Emmanuel Acquah, Xavier Bonal, Torberg Falch, Emmanuele Pavolini and Christian Morabito). The team would also like to thank national experts who completed the Strength through Diversity Policy Survey, which fed into this report. Furthermore, the report was enriched by the thoughtful contributions provided by the many individuals who participated in Phase II of the *Strength through Diversity* project.

Thanks are due to the many people who worked on the project at different stages of its development, in addition to the current members: Francesca Borgonovi (Project Leader from January 2017 to July 2019); Ottavia Brussino (Intern and Consultant from June 2019 to March 2022); Francesca Gottschalk (Analyst from September 2021 to March 2022); Caitlyn Guthrie (Analyst from May 2018 to December 2019); Alexandre Rutigliano (Intern and Consultant from June 2019 to May 2022); Jody McBrien (July 2021 to July 2022) on secondment from the University of South Florida and on fellowship from the Council of

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Table of contents

Foreword 3

Abbreviations and acronyms 10

Executive summary 11

1 An overview of diversity, equity and inclusion in education 13
Introduction 14
Contextual developments shaping diversity, equity and inclusion in school education 14
Developments in the area of equity and inclusion 21
Conceptualising diversity, equity and inclusion in education 24
Diversity 31
Holistic framework for diversity, equity and inclusion 39
References 43
Annex 1.A. Methodologies and definitions 54
Notes 63

2 Governing and designing education systems to promote equity and inclusion 64
Introduction 65
Education goals and curricula for equity and inclusion 65
Regulatory frameworks for equity and inclusion 77
National frameworks relating to equity and inclusion in education 80
Intersectionality of diversity in education 84
Responsibilities for and administration of equity and inclusion in education 89
Education provision can be designed to support the goals of equity and inclusion 95
Pointers for policy development 112
References 116
Notes 135

3 Resourcing education systems to foster equity and inclusion 136
Introduction 137
Main allocation mechanisms: how regular funding can account for equity and inclusion goals 140
Targeted distribution of resources: targeted programmes and resources to support students 149
Pointers for policy development 167
References 169
Annex 3.A. Students accounted in funding formulas and evaluation of funding models 181
Notes 184

4 Building capacity to foster equity and inclusion 185
Introduction 186
Preparing and supporting teachers to respond to increasing diversity and create equitable and inclusive learning environments 187
Building capacity among school leaders to promote equity and inclusion 202
Recruiting and retaining teachers from diverse backgrounds 206
Fostering positive relationships among students 214
Raising awareness of diversity in education among stakeholders 216
Pointers for policy development 218
References 222
Notes 240

5 Promoting equity and inclusion through school-level interventions 241
Introduction 242
Matching resources within schools to individual student learning needs 242
School climate 247
Learning strategies to support diverse students 250
Ensuring equitable and inclusive assessment practices 267
Non-instructional support and services 274
Engagement with parents or guardians and communities 280
Pointers for policy development 284
References 287
Notes 308

6 Monitoring and evaluating equity and inclusion 309
Introduction 310
Monitoring progress in improving equity and inclusion in education 310
Evaluating policies, programmes and processes to improve equity and inclusion in education 333
Supporting schools in improving equity and inclusion practices through evaluation processes 339
Pointers for policy development 347
References 349
Notes 363

7 The key steps to equity and inclusion in education 364
Develop a policy framework on equity and inclusion and embed it in all areas of education policy 365
Ensure that the education system is flexible and responsive to the needs of students 366
Include equity and inclusion as principles of both main resource allocation mechanisms and targeted funding of the education system 366
Engage all relevant stakeholders and strengthen coordination across the education system 367
Prepare and train teachers and school leaders in the area of equity and inclusion 368
Identify students' needs, support them and monitor their progress 369
References 370

FIGURES

Figure 1.1. Number of refugees and asylum-seekers across the world 16
Figure 1.2. Number of education jurisdictions with and without a definition of equity and inclusion 25
Figure 1.3. Four types of educational model 28
Figure 1.4. Dimensions of diversity 32
Figure 1.5. Definitions of dimensions of diversity (2022) 37

Figure 2.1. Curriculum strategies (2022) 73
Figure 2.2. Intersectional policy analysis 85
Figure 2.3. Multi-strand approach 86
Figure 2.4. Intersectionality-based policy analysis framework 87
Figure 2.5. Percentage of decisions taken at each level of government in public lower secondary education (2017) 90
Figure 2.6. Age at first selection and equity in reading performance 101
Figure 2.7. Learning settings (2022) 106
Figure 3.1. Shortage of material resources in schools and reading performance (PISA 2018) 138
Figure 3.2. Basis used to allocate general funding to public primary educational institutions, by category of funding (2019) 146
Figure 3.3. Groups of students accounted for in the funding formulas (ISCED 2) 147
Figure 3.4. Provision of additional resources to schools based on student groups' enrolment 150
Figure 3.5. Free (or reduced-price) school meals 156
Figure 3.6. Transportation to/from school (e.g., school buses, subsidised public transportation) 158
Figure 3.7. Does the policy framework include provisions for changing physical school infrastructure and facilities, for specific groups of students? 160
Figure 3.8. Providing educational (instructional) materials (e.g., textbooks) 161
Figure 3.9. Providing students with digital tools 162
Figure 3.10. Allocating more teaching staff during instruction 165
Figure 3.11. Allocating learning support staff (e.g., teaching assistants) during instruction 166
Figure 4.1. Core competences for inclusive teaching 188
Figure 4.2. Teachers' needs for training on diversity, equity and inclusion (PISA 2018) 191
Figure 4.3. Percentage of lower secondary school leaders reporting professional development needs for promoting diversity and equity 204
Figure 5.1. School climate as measured in PISA 2018 248
Figure 5.2. Provision of an Individual Education Plan (or a similar document) 253
Figure 5.3. Accommodations and modifications 255
Figure 5.4. Changes in pedagogical approaches 260
Figure 5.5. Grade repetition in OECD countries (PISA 2018) 272
Figure 5.6. Grade repetition, socio-economic status and reading performance (PISA 2018) 274
Figure 6.1. Percentage of students who expect to complete tertiary education 312
Figure 6.2. Inputs-processes-outcomes model 314
Figure 6.3. Data collections on diversity (2022) 315
Figure 6.4. Type of data collection (2022) 316
Figure 6.5. Data collections on students irrespective of specific groups (2022) 319
Figure 6.6. Data collections on academic and well-being outcomes (2022) 320
Figure 6.7. Indicators (2022) 323
Figure 6.8. Dimensions of the Index for Inclusion 342

TABLES

Table 1.1. Differences in reading performance across groups of students 22
Table 1.2. Key elements mentioned by education systems' definitions of equity and inclusion 26
Table 1.3. Policy areas to analyse diversity, equity and inclusion in education systems 41
Table 2.1. Groups receiving special provisions within the curriculum, by country/jurisdiction 70
Table 2.2. Education systems with policies targeting intersections of student groups 88
Table 2.3. Types of differentiation in lower secondary across OECD countries 98
Table 2.4. Types of learning settings 104
Table 4.1. School leadership roles and responsibilities to promote equity and inclusion 203
Table 5.1. Advantages and disadvantages of one-to-one and small group tuition 252
Table 5.2. Universal Design for Learning Guidelines 257
Table 5.3. What is differentiated instruction? 261
Table 5.4. Academic instruction interventions 262
Table 5.5. How to cross-pollinate CSP and UDL 263
Table 5.6. Advantages and disadvantages of assistive technology 266

Annex Table 1.A.1. Difference between 2009 and 2018 in diverse student groups gaps 55
Annex Table 1.A.2. Definitions of equity 56
Annex Table 1.A.3. Definitions of inclusion 59
Annex Table 3.A.1. Groups of students accounted for in the funding formulas (ISCED 2), by education system 181
Annex Table 3.A.2. Advantages and disadvantages of input, throughput and output models 183

BOXES

Box 2.1. Educational goals at global and European Union levels 67
Box 2.2. Curriculum adaptations to promote equity 69
Box 2.3. Curriculum in Portugal 75
Box 2.4. Guidance on the right to education in practice: the Abidjan Principles 79
Box 2.5. Selected policy frameworks on intersectionality 85
Box 2.6. Six levels of stakeholder engagement 93
Box 2.7. Mitigating the impacts of ability grouping and tracking 102
Box 2.8. Examples from the Netherlands for active school choice 110
Box 2.9. Building heterogeneous school zones 111
Box 3.1. Norway's experience with the limitations of additional grants 144
Box 4.1. Fostering in-school collaboration in Alberta and Ontario (Canada) 197
Box 4.2. Standards to promote teachers' professional learning in Australia and New Zealand 200
Box 5.1. Multidisciplinary teams to support inclusion in Portugal 244
Box 5.2. Olweus Bullying Prevention Programme: a whole-school bullying prevention programme 250
Box 5.3. Targeted academic instruction: an example for ADHD 261
Box 5.4. Cross-pollinating Culturally Sustaining Pedagogies and Universal Design for Learning 263
Box 5.5. Social robots for students with autism spectrum disorder 265
Box 5.6. Grade repetition 272
Box 5.7. School-based counselling and mental health support in the context of COVID-19 275
Box 6.1. Concepts of equity in education 311
Box 6.2. Inputs-processes-outcomes model 313
Box 6.3. Reform and monitoring of inclusive education in Portugal 317
Box 6.4. Dashboard of indicators on equity in and through education 321
Box 6.5. The LGBTQI Inclusive Education Index 330
Box 6.6. The French Council for School Evaluation 333
Box 6.7. Inclusive reforms in New Brunswick (Canada) 335
Box 6.8 Evaluation of inclusive reforms in the Czech Republic 336
Box 6.9. Gender Impact Evaluations: Gender Mainstreaming Toolkit 337
Box 6.10. Evaluation framework in Scotland (United Kingdom) 341
Box 6.11. Index for Inclusion 342
Box 6.12. School evaluation in New Zealand 344
Box 6.13. Central South Wales Challenge 346

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Abbreviations and acronyms

ADHD	Attention Deficit Hyperactivity Disorder
AI	Artificial intelligence
ALC	Area learning community (Northern Ireland)
APST	Australian Professional Standards for Teachers
ASD	Autism spectrum disorders
CEFR	Common European Framework of Reference
CRC	United Nations Convention on the Rights of the Child
CRPD	United Nations Convention on the Rights of Persons with Disabilities
CSP	Culturally Sustaining Pedagogy
ECEC	Early childhood education and care
EU	European Union
GDP	Gross Domestic Product
IEP	Individual Education Plan
IGLYO	International Lesbian Gay, Bisexual, Transgender, Queer and Intersex Youth and Student Organisation
ISCED	International Standard Classification of Education
ITE	Initial teacher education
LGBTQI+	Lesbian, gay, bisexual, transgender, queer, intersex and other non-cisgender gender identities and non-heterosexual sexual orientations
NGO	Non-governmental organisation
PISA	OECD Programme for International Student Assessment
SDGs	Sustainable Development Goals
SEN	Special education needs
STEM	Science, technology, engineering and mathematics
TALIS	OECD Teaching and Learning International Survey
UDL	Universal Design for Learning
UNDRIP	United Nations Declaration on the Rights of Indigenous Peoples
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNICEF	United Nations Children's Fund
VET	Vocational education and training

Executive summary

Introduction

Governments and education policy makers are increasingly concerned with equity and inclusion in education due to several major global developments such as demographic shifts, migration and refugee crises, rising inequalities, and climate change. These developments have contributed to increasing diversity and warrant an examination of its impact on equity and inclusion in education.

The report synthesises the main findings of the OECD Strength through Diversity Project (Phase II, 2019-2022). It presents a holistic framework for studying diversity, equity and inclusion in education, structures the analysis in five key policy areas (i.e., governance; resourcing; capacity building; school-level interventions, and monitoring and evaluation), provides examples of good policies and practices, and offers policy advice on promoting more equitable and inclusive education systems.

Key findings

Education systems vary in terms of defining and conceptualising diversity, equity and inclusion in education. They have developed their own definitions, which reflect their history, priorities and educational goals. This creates considerable challenges for comparative analysis. This report supports the view that equity and inclusion in education systems are approached holistically, building on their interdependencies to generate complementarities and prevent inconsistent objectives.

Governing and designing education systems to promote equity and inclusion

Developing an equitable and inclusive education system requires a holistic approach. This implies the need for education systems to look beyond policy silos and connect them through a policy framework that links key areas for equity and inclusion, from the design of curricula, the conception of teaching practices, the capacity building of teaching staff, to the design of data collections and monitoring of student outcomes. A policy framework can also highlight the importance of fostering student well-being together with their achievement, and emphasise the role of schools in the development of inclusive environments.

It is also important that all relevant stakeholders for equitable and inclusive education are engaged meaningfully throughout the policy cycle. This entails involving them in the development of the policy framework to ensure a shared understanding of the goals, means and concepts adopted by the education system. It then translates into building partnerships to ensure the implementation of the framework across different government levels and to secure the collaboration with other government areas (e.g., health and social services), and non-state institutions (e.g., teacher unions and employers).

Resourcing education systems to foster equity and inclusion

The way funding is allocated to schools and students that are most in need of additional resources has fundamental implications for the equity and inclusion of an education system. To this end, education systems should leverage both main allocation mechanisms and targeted distributions of resources to appropriately support all students. These two funding mechanisms can serve these objectives through different means, and while they both have several strengths, they also entail some risks, such as overlap between programmes and excessive bureaucracy. It is thus important to ensure that both main allocations and targeted funds are designed with the explicit goals of fostering equity and inclusion in education, and that their respective challenges are taken into account and balanced. Moreover, when designing targeted funds for diversity, equity and inclusion, countries should take advantage of the wide range of funds that is available to them: from the provision of financial resources and in-kind benefits to the allocation of physical and human resources, education systems have access to numerous ways of supporting disadvantaged students in education.

Building capacity to foster equity and inclusion

Supporting the learning and well-being of all students requires teachers to have strong theoretical knowledge of differentiated instruction and the skills to put this into practice. Without adequate learning opportunities throughout the teaching life-course, teachers often feel unprepared to address the diverse needs of students. That is why it is important to incorporate diversity, equity and inclusion within initial teacher education and continuous professional learning. Such training is also necessary for school leaders who can drive the effective implementation of practices for equity and inclusion and thereby influence student learning outcomes.

Furthermore, ensuring the diversity of school staff has increasingly been considered an important policy lever in advancing equity and inclusion in a context of increasing student diversity. This requires a holistic approach encompassing both strategies to attract diverse candidates into initial teacher education and initiatives to support and retain diverse teachers.

Promoting equity and inclusion through school-level interventions

Education systems' policies can create an equitable and inclusive framework for education settings, but their implementation at the school level is what determines students' daily experiences in classrooms. It is in schools that policies take the form of specific resources, teaching practices and instructional and non-instructional support mechanisms. Numerous interventions at the school level (including matching resources within schools to individual student learning needs; providing learning strategies to address diversity; offering non-instructional support and services; and engaging with parents and communities) are needed to promote equity among and the inclusion of all students.

Monitoring and evaluating equity and inclusion in education

Monitoring and evaluation can play a fundamental role in ensuring that an education system is not only introducing policies to improve equity and inclusion but also implementing them and achieving its objectives. As such, it is important that education systems monitor progress in improving equity and inclusion in education, and evaluate policies, programmes and processes to promote equity and inclusion in education. Evaluation processes can also support individual schools in improving equity and inclusion practices. Education systems thus need to design monitoring systems that assess progress towards equity and inclusion. Instruments that are used to measure progress towards equity and inclusion can be embedded in a comprehensive strategy. Evaluations to identify policies, programmes and processes that best address the needs of students should be leveraged at the central, local and school levels.

1 An overview of diversity, equity and inclusion in education

This chapter introduces a conceptualisation of the main themes in the area of diversity, equity and inclusion, and reflects on the external contexts that affect them. It also presents a holistic framework on how governments and schools can address diversity, equity and inclusion. It further looks at its various components, such as governance, resourcing, capacity building, school-level interventions, and monitoring and evaluation. This framework guides the subsequent chapters of this report. In addition, the chapter discusses how more equitable and inclusive education settings can have broader implications not only for students but also for societies as a whole.

Introduction

This chapter provides the context shaping diversity, equity and inclusion in school education, conceptualises the main themes of the report and proposes a holistic framework for the analysis. It also discusses how more equitable and inclusive education systems can have broader implications not only for students but also for societies as a whole.

The chapter presents a holistic framework to analyse how governments and schools address diversity, equity and inclusion. It considers six dimensions of diversity - migration; ethnic groups, national minorities and Indigenous peoples; gender; gender identity and sexual orientation; special education needs; giftedness - and examines the intersections between them. The chapter reviews and discusses five key policy areas to consider when analysing equity and inclusion in education: governance; resourcing; capacity building; school-level interventions; and monitoring and evaluation. The subsequent chapters will analyse the issues relevant to each individual component of the holistic framework in more depth.

This chapter and this report focus mostly on school education. Indeed, while examples on early childhood education and care (ECEC) and higher education are mentioned when particularly relevant, they are not considered as key focus points in this report. The report is based on the work of the Strength through Diversity Project, which will also be referred to as “the Project” throughout.

Contextual developments shaping diversity, equity and inclusion in school education

Education policy does not happen in a vacuum. It requires openness and interactions between systems and their environments and is influenced by economic, political, social and technological trends (OECD, 2016[1]; OECD, 2019[2]). The major global developments of our time, such as demographic shifts, migration and refugee crises, rising inequalities, and climate change have contributed to the increasing diversity found in our countries, communities and classrooms. These changes warrant reflection about the implications that diversity has on education systems and conversely, the potential role education systems play in shaping these trends and building more sustainable, cohesive and inclusive societies for tomorrow.

Ageing population and urbanisation

In 29 out of 36[1] OECD countries, natural population decline[2] is a reality across several regions, and ageing in cities and rural areas is significant. This demographic change will have considerable social and economic impacts (OECD, 2019[3]). The first major driver of population decline is the declining total fertility rates (TFR).[3] The average TFR of OECD countries decreased from around 2.8 children per woman of childbearing age in 1970 to somewhere between 1.3 and 1.9 in 2020, which is well below the rate (2.1 children per woman) needed for population replacement (OECD, 2022[4]). Consequently, many OECD countries will experience declining numbers of students and graduates over the next decade (Santa, 2018[5]). The second major driver of population decline is ageing which results from people living longer lives and, consequently, the elderly population (aged 65 and over) continuing to grow at an unprecedented rate across all OECD countries (OECD, 2022[6]). The ageing population trend also poses a challenge to modern societies; ageing populations have different educational needs, compared to the traditional school population, particularly concerning their need to develop technological and digital literacy, which they would not have learnt as part of their initial education. From a lifelong learning perspective it is of great importance to foster the development of digital skills, using a combination of policies that provide high-quality education and training for all, anticipate changes in the demand of skills, and ensure that education and training systems are aligned with labour market needs (OECD, 2019[7]).

These changes in population composition have not affected countries uniformly but affected some areas more than others. On the one hand, the decline of agriculture and traditional primary industries in rural areas has made cities increasingly important and attractive. Young people migrate out of the countryside to study, find more and better employment opportunities, and make use of amenities in larger cities (OECD/European Commission, 2020[8]). This trend of rural depopulation has thus been driven by the positive net migration towards metropolitan regions in recent years, which is generally known as urbanisation (OECD, 2020[9]). The number of people living in cities more than doubled in the last 40 years from 1.5 billion in 1975 to 3.5 billion people in 2015, with almost half of the world's population living in cities, and this share is estimated to reach 55% by 2050 (OECD/European Commission, 2020[8]).

These trends have important implications for equity and inclusion within education systems. Quality and access to education show great variation between rural and urban areas, as cities offer more and better opportunities in education compared to rural areas (OECD/European Commission, 2020[8]). In most countries, there are more socio-economically disadvantaged students in rural[4] than in urban schools, and students in rural schools tend to underperform in secondary education and are less likely to complete a higher education degree in comparison to students in cities (OECD, 2014[10]; OECD, 2019[11]). In addition to the urban-rural gap in education systems, inequities within cities are also on the rise. Some of the urban inequities that threaten equity and inclusion in education are unequal allocation of educational resources, lack of access to cultural institutions, residential segregation in major cities, higher concentration of single-parent families, and more disparate income levels (OECD, 2014[12]). Geographic inequalities within cities are highly interlinked with social and economic status, which further presents a risk of residential and social segregation in schools (OECD, 2017[13]; OECD, 2019[14]). Moreover, there are significant differences in educational outcomes between students from different socio-economic backgrounds, which suggests that education is both a predictor and the outcome of segregation (Cerna et al., 2021[15]).

Ageing and urbanisation take place within the context of other socio-economic trends that vary widely among countries and regions. On the one hand, lower income countries tend to have higher fertility rates (World Bank, 2016[16]). On the other hand, countries with greater economic and political stability are preparing for the realities of a rapidly ageing population, whereby the elderly outnumber those of working-age.

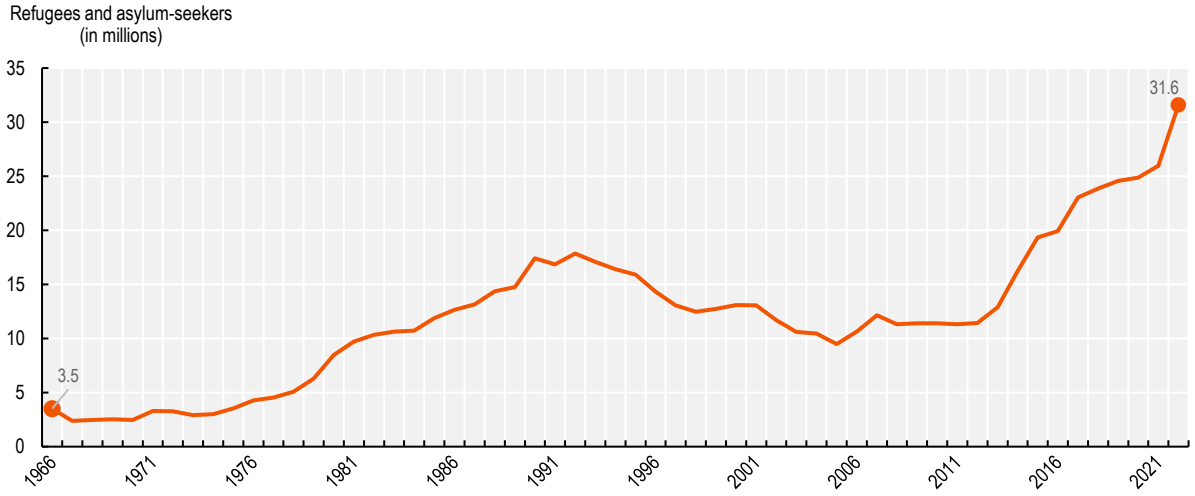
The increasing diversity associated with these trends has important implications for education systems (Cerna et al., 2021[15]). For example, many OECD countries are experiencing a general decline in the school-age population, resulting in excess school capacity in certain regions and communities. However, areas in which schools have the capacity to take more students are unlikely to be those that generally receive an influx of students (which are typically urban, rather than rural, areas). This phenomenon may thus drain resources from where demand outstrips capacity.

Increasing migration and refugee crises

Further demographic changes over the last decades have also been driven by migration flows, which are profoundly changing the composition of societies and accordingly of schools and classrooms (Cerna, Brussino and Mezzanotte, 2021[17]). Immigrants are significantly more concentrated in specific types of regions than the native-born population. in the 22 OECD countries with available data, more than half of the foreign-born population (53%) lives in large metropolitan regions, compared to only 40% of the native-born population (OECD, 2022[18]). Student populations and classrooms in urban areas are therefore more diverse and projected to become increasingly more so due to trends in migration (Cerna et al., 2021[15]). Refugee crises have also been occurring more often, and on a larger scale, in the last couple of decades. The rapid increase in the numbers of refugees can be seen in Figure 1.1. The 2014-2015 refugee crisis has had a major effect on OECD countries due to the number of those and the comprehensive policy response required. Even though many of the countries had already welcomed previous flows of refugees, the magnitude and diversity of the flows within a short time period was unprecedented (Cerna, 2019[19]).

According to data from the United Nations High Commissioner for Refugees (UNHCR), the number of globally displaced people (refugees, internally displaced people and asylum-seekers) as of June 2022 is at a record high of over 103 million people (UNHCR, 2022[20]). As of mid-2022, there were 31.6 million refugees and asylum-seekers around the world (Figure 1.1), with approximately half being under the age of 18 (UNHCR, 2022[20]). As of November 2022, Russia's war of aggression against Ukraine has also forced 7.8 million people to flee their homes, with the number of refugees continuing to rise (UNHCR Operational Data Portal, 2022[21]).

Figure 1.1. Number of refugees and asylum-seekers across the world



Source: UNHCR (2022[22]), Refugee Data Finder, www.unhcr.org/refugee-statistics/download/?url=d8zqXO (accessed 13 December 2022).

StatLink https://stat.link/utp1i8

Moreover, the adverse effects of climate change and natural disasters, such as rising sea levels, desertification and extreme weather conditions, will further exacerbate existing refugee crises, leading to a higher number of displaced people, and worsening living conditions for many vulnerable groups (UNHCR, 2022[23]). Indeed, millions of people are fleeing their homes due to natural disasters and this situation is projected to become more severe in the future (OECD/EBA, 2022[24]). Given the prominence and severity of refugee crises around the world, it is crucial that education systems address the diverse needs of refugee students, including their learning, social and emotional needs, and promote their inclusion in schools (Cerna, 2019[19]).

Importantly, demographic change and increased mobility lead to questions about the fundamental design of today's education systems, and their role in building nation-states by transmitting a common language, history and identity. Globalisation and increasing diversity are creating fissures in assimilationist models as influences beyond national affiliations progressively seep into our everyday lives. There is also a growing emphasis in the public discourse on the need to foster tolerance and respect of others since global competencies are crucial for maintaining international co-operation in the pursuit of world peace and addressing shared challenges like climate change.

Rising inequalities

Global economic growth has increased in recent decades, lifting millions out of poverty. However, this growth is not benefiting everyone equally. Almost all OECD countries have experienced rises in income

inequality in the last 30 years (OECD, 2011[25]; OECD, 2015[26]; OECD, 2016[27]), social mobility has stalled (OECD, 2018[28]), and the middle class has been squeezed by rising costs, employment uncertainty and stagnating income (OECD, 2019[29]; OECD, 2021[30]). Moreover, technological progress can exacerbate inequality. In the face of automation, artificial intelligence (AI) and digitalisation, labour market demand for medium-level skills is shrinking while high- and low-level skills (for tasks that are difficult to automate) are in increasing demand (OECD, 2013[31]; OECD, 2016[32]). This led to a hollowing out of jobs involving mid-level skills (OECD, 2016[32]). The result has been a pattern of job polarisation by skill level in many but not all OECD countries (Autor, 2015[33]; Berger and Frey, 2016[34]). This means important job gains in some industries and regions and significant job losses in others. As job prospects shift, the transition can be especially difficult for individuals in rural areas where there is lower technological readiness and fewer opportunities to adapt.

Widening inequality also has significant implications for growth and macroeconomic stability, as it can lead to a suboptimal use of human resources and raise crisis risk (Dabla-Norris et al., 2015[35]). Inequality perpetuates socio-economic disadvantage and intergenerational mobility by hindering the ability of disadvantaged people to invest in greater education and training for themselves and their children (Katharine Bradbury and Robert K. Triest, 2016[36]). In fact, children whose parents did not complete secondary school are 4.5 times less likely to go to tertiary education than children who have at least one parent with a higher education degree, on average across countries participating in the Programme for the International Assessment of Adult Competencies (PIAAC) (OECD, 2014[37]). Education has an important role to play in breaking this cycle by ensuring that all students receive the opportunities and support needed to succeed in the global future.

Digitalisation

The way we work, consume and communicate with each other has changed rapidly over the past decades as nearly every area of people's lives and work has been reshaped by the digital transition (OECD, 2019[38]). New digital technologies and information and communication technology (ICT) generate both opportunities and challenges for inclusive education. On the one hand, there is potential to support and improve education processes of students with special education needs (SEN), minority groups and students living in areas that have more limited traditional educational offerings. Examples include personalised learning or Universal Design for Learning (UDL) to create more equitable and inclusive curricula (OECD, 2021[39]) as well as computer aided learning on tablets and iPads (UNESCO, 2020[40]). On the other hand, many countries face a real challenge regarding inequalities in access to digital technologies and the Internet in education. To overcome these inequalities, policies to encourage the participation of underrepresented groups in the digital economy have been put in place through online universities or digital learning workshops (van der Vlies, 2020[41]). Another aspect is gender-based digital exclusion due to a lack of access to skills and technological literacy for girls, who are less often exposed to technology, contributing to the digital gender divide in science, technology, engineering and mathematics (STEM) education. To bridge inequalities of this nature, campaigns aimed at awareness-raising and policies providing enhanced, safer and more affordable access to digital tools are key (OECD, 2018[42]).

Digitalisation can have implications also for students' well-being, which is a core aspect of inclusion. Indeed, while digital spaces offer vast opportunities for children to play, learn and explore, there are increasing digital risks. Some examples include cyberbullying, hate speech and revenge porn which may negatively affect children's well-being (Burns and Gottschalk, 2020[43]). Children who are victims of cyberbullying, for instance, tend to show higher levels of anxiety and depressive symptoms, which may affect their education (Gottschalk, 2022[44]). Some students are more exposed to the risk of being cyberbullied than others: students with SEN and those who identify as LGBTQI+ (which stands for lesbian, gay, bi, trans, queer, intersex) generally incur in this risk. Girls are also more likely to be cyberbullied than boys are (ibid.), highlighting that this is a digital risk that may be disproportionately experienced by different

student groups and can therefore affect equity and inclusion in the school environment. Children with SEN, those facing mental health difficulties, and those with physical disabilities might also be disproportionately vulnerable to exposure to digital risks (El Asam and Katz, 2018[45]).

Data from the OECD Programme for International Student Assessment (PISA) 2018 show that students' use of the Internet continues to increase while the opportunity to learn digital skills in school is far from universal. Indeed, students with a higher socio-economic status and with more educated parents are more likely to have better digital schools. Schools can foster proficient readers in a digital world by closing these gaps and teaching students basic digital literacy (Suarez-Alvarez, 2021[46]). Thus, providing all students with the critical thinking skills necessary to safely navigate digital spaces and technology is an important commitment for the development of an equitable and inclusive education system.

Weakening trust and social cohesion

The democratic process relies on the civic knowledge and skills of citizens, as well as their engagement in public matters (OECD, 2019[2]). Trust is an important indicator to measure how people perceive the quality of, and how they associate with, government institutions in democratic countries (OECD, 2022[47]). On average, OECD countries are performing reasonably well on various measures of governance, such as citizens' perceptions of government reliability, service provision and data openness. However, trust levels decreased in 2021 as countries struggle with the largest health, economic and social crisis in decades (though they remain slightly higher than in the aftermath of the 2008 economic crisis) (ibid.). Public confidence is now evenly split between people who say they trust their national government and those who do not. Historical data show that it takes a long time to rebuild trust when it is diminished: for instance, it took about a decade for public trust to recover from the 2008 crisis (ibid.). Furthermore, the OECD (2022[47]) has found that disadvantaged groups with less access to opportunities have lower levels of trust in government. In particular, younger people, women, people living on low incomes, people with low levels of education, and people who feel financially insecure consistently report lower levels of trust in government. Across countries, there is a sense that democratic government is working well for some, but not well enough for all.

Education can help societies increase trust and social cohesion. Indeed, individuals' higher levels of education generally translate into greater civic participation, such as voting and volunteering, which help to build social cohesion (Mezzanotte, 2022[48]; OECD, 2010[49]). All these facts combined can contribute to a successful and healthy democracy (ibid.). There are thus incentives for governments to invest in quality education for all citizens, including and particularly for diverse groups, to eliminate barriers to their inclusion in education and generate benefits for both individuals and the societies in which they live. There exists a large literature that examines the economic impact of diversity, including the assessment of how ethnic and immigrant diversity affects social cohesion. Most of this literature focusing on OECD countries addresses how diversity can affect trust, voting patterns, civic participation, preferences for redistribution and investment into public goods (OECD, 2020[50]).

Moreover, the inclusion of minority groups in education has an impact on other groups' development (Mezzanotte, 2022[48]). Indeed, there is mounting evidence that social interactions between groups have a positive impact on social cohesion, and particularly, trust. As children go through their early life experiences, they form their attitudes and beliefs about other groups, which may be harder to change as they grow older (ibid.). Young people must have opportunities to interact with members of other ethnic groups for meaningful cross-group bonds to develop - and diverse schools can offer more of these opportunities. Indeed, inclusive school environments are characterised by positive social experiences for all students (Nishina et al., 2019[51]), such as decreased bullying, reduced loneliness and greater numbers of cross-group friendships. In addition, studies on students in inclusive environments show that those who learn in such schools report greater interest in living and working in ethnically diverse environments when they become adults and are more likely to do so as adults. By contrast, ethnically isolated schools may

limit opportunities for young people to challenge skewed perceptions and assumptions about people from other racial groups (Tropp and Saxena, 2018[52]).

In increasingly diverse societies, the need to adapt education systems to all learners' needs will be essential in building cohesion and inclusive societies that leave no one behind. Indeed, inclusive education can offer all children a chance to learn about and accept each other's abilities, talents and needs (Mezzanotte, 2022[48]). This process, through the fostering of meaningful relationships and friendships, can strengthen social competences while also building social cohesion (Council of Europe, 2015[53]). In an increasingly globalised and complex world, inclusive education can strengthen the trust and sense of belonging of citizens and among citizens (Mezzanotte, 2022[48]).

Well-being and mental health

Across the OECD, up to one in five people are living with a mental health condition at any time, and around one in two people will experience mental ill-health in their lifetime (OECD, 2021[54]). Children and adolescents' mental health can have an important impact on their education. The majority of mental disorders tends to begin during school years: half of all mental illnesses begin by the age of 14 and three-quarters by mid-20s (Kessler et al., 2007[55]; OECD, 2018[56]), with anxiety and personality disorders sometimes beginning around age 11 (OECD, 2012[57]).

Mental health problems can affect many areas of students' lives, reducing their quality of life and academic achievement, including early dropout from school (Breslau et al., 2008[58]). They can also affect a student's energy levels, concentration, dependability and optimism, hindering performance (Eisenberg et al., 2009[59]; Suicide Prevention Resource Center, 2020[60]). Beyond education, living with a mental health condition makes it more difficult to stay in school or employment, harder to study or work effectively, and more challenging to stay in good physical health (OECD, 2021[54]). These individual and social costs also have an economic dimension. Mental health problems represent the largest burden of disease among young people, and mental ill-health is at least as prevalent among young people as among adults (OECD, 2015[61]).

Across all countries that have tracked population well-being during the COVID-19 pandemic in 2020, the mental health status of young people has been markedly worse than that of the general population (OECD, 2021[62]). Often, the mental health of these population groups has worsened faster than that of the general population. At the same time as mental health declined, there were significant disruptions to mental health support and services delivered in schools, and other settings outside of specialist mental health care. Worldwide, 78% of countries reported at least partial disruptions to related school programmes (WHO, 2020[63]). Data from March 2021 in Belgium, France and the United States reveal that the share of 15-24 year-olds reporting symptoms of anxiety and depression was more than twice as high than the most recent data available from before the outbreak (Sciensano, 2021[64]; Santé Publique France, 2021[65]; U.S. Census Bureau, 2021[66]).

The increased prevalence of mental disorders entails important challenges for education systems that have to support the mental health of students, and ensure that their well-being needs are being met.

COVID-19

The COVID-19 pandemic has had, and is still having, a profound impact not only on people's health, but also on how they learn, work and live. At the peak of the crisis in 2020, more than 188 countries, encompassing around 91% of enrolled learners worldwide, closed their schools to try to contain the spread of the virus (UNESCO, 2020[67]). In 2020 and 2021, the COVID-19 pandemic interrupted the school attendance of 1.5 billion students (Vincent-Lancrin, Cobo Romaní and Reimers, 2022[68]), with schools remaining closed or being re-opened and then closed again depending on the severity of the health situation. Reasons for re-opening schools despite the unstable health conditions varied across countries,

but included the need to develop students' knowledge and skills, catch up on learning losses, provide extra services, and allow parents to return to work, among others (Reimers and Schleicher, 2020[69]). A number of schools switched to hybrid learning, combining in-person schooling with distance learning where students and teacher alternated between the two modes of delivery (OECD, 2021[70]).

School closures carry high social and economic costs for people across various communities. Their impact, however, is particularly severe for the most vulnerable and marginalised students and their families. The disruptions to learning caused by school closures can exacerbate already existing disparities within education systems while also affecting other aspects of these students' lives, such as interrupted learning, poor nutrition, exposure to violence and exploitation, and increased dropout rates (UNESCO, 2020[71]).

During school closures, education systems had to rapidly adapt and find solutions to ensure educational continuity for their students. However, as systems moved to e-learning, the digital inequalities in connectivity, the gaps in access to devices and the varying skill levels of students became a key challenge for ensuring equity and inclusion in education. For instance, parents in more advantaged families were likely to have had better digital skills and be better equipped to support home learning for their children. Many students living in camps, informal settlements and overcrowded places, such as refugee or Roma students, were unlikely to have had access to digital devices or a quiet place to study. Moreover, students with SEN may have experienced different barriers in accessing some types of devices or software, and non-native speaker students may have struggled without appropriate support (OECD, 2020[72]).

School re-openings, too, entailed challenges for countries to respond to disadvantaged and vulnerable students' needs. As mentioned before, disadvantaged and vulnerable students have been on average significantly less engaged in remote learning (Lucas, Nelson and Sims, 2020[73]), and countries have been considering various measures to ensure educational equity and inclusive environments in order to limit further educational gaps for these student populations. Some areas that require particular attention from governments include ensuring the return to schools and containing dropout rates for vulnerable populations, addressing learning gaps, ensuring the well-being of students while supporting teachers and monitoring that these efforts are inclusive of all students. The pandemic has also highlighted the need for efficient and targeted use of education resources, as discussed more in depth in Chapter 3.

The COVID-19 pandemic has demonstrated that the future is unpredictable, and that people require adaptability and resilience to cope in a world that is rapidly changing (OECD, 2021[74]). Education is key in strengthening cognitive, social and emotional resilience[5] among learners, helping them understand that living in the world means trying, failing, adapting, learning and evolving. Educational institutions and education systems, too, need to become more flexible and resilient to succeed amid unforeseeable disruptions. Resilient education systems plan for disruption, and withstand and recover from adverse events, are able to fulfil the human right to education, whatever the circumstances, and foster the level of human capital required by successful economies in the short and longer term (OECD, 2021[74]; Schleicher, 2018[75]). At the same time, resilient education systems develop resilient individuals who adjust to everyday challenges, play an active role in their communities, and respond to an increasingly volatile, uncertain and ambiguous global landscape (OECD, 2021[74]).

Climate change and environmental crises

The effects of the climate crisis are being, and will increasingly be, felt on a global scale (UNICEF, 2019[76]). Evidence shows that extreme temperature events have been increasing as a consequence of human-induced climate change (IPCC, 2021[77]). Increased temperatures, air pollution and extreme events such as floods, droughts and storms, are disrupting people's lives around the globe. These changes will not only have significant consequences for the health and human capital of societies, but also for the education of children. In particular, they may affect vulnerable children and exacerbate current education inequalities (UNICEF, 2019[76]). Indeed, groups that are more susceptible to climate-related risks are

individuals living under the poverty line in both urban and rural areas, those with physical impairments, young girls and boys, and minority and immigrant groups (Hijioka et al., 2014[78]; UNICEF, 2015[79]).

Climate-related disasters can damage or even destroy schools and learning materials as well as important infrastructure such as bridges and roads needed to access schools. These events can disrupt children's learning for months leading to missed days of school, absenteeism and lower academic performance in comparison to students in other schools. Moreover, climate change affects clean air, safe drinking water, and sufficient nutritious food and secure shelter, which has compounding effects on children's academic well-being. The risk in livelihood security and income results in parents being unable to afford school costs, and children often miss classes to help with household activities. In some cases, families are forced to migrate which frequently translates to dropouts or lower academic performance (UNICEF, 2019[76]).

Air pollution also creates a burden on student's learning. As reported by the World Bank (2022[80]), a study in Barcelona (Spain) shows that, adjusting for socio-economic status, students exposed to high pollution levels in school had less cognitive development growth than those in less polluted schools (Sunyer et al., 2015[81]). Similarly, evidence from the United States demonstrates lower test scores and more absences for children attending schools downwind of a major highway (Heissel, Persico and Simon, 2019[82]; UNESCO, 2020[83]). Furthermore, at the end of secondary school, high levels of transitory pollution and extreme temperatures can reduce students' performance on high-stakes exams used to select students for tertiary level education. Consequently, students most affected by adverse environmental conditions may be less likely to gain entrance into tertiary educational institutions or fail to enter the most prestigious institutions (Ebenstein, Lavy and Roth, 2016[84]; Graff Zivin et al., 2020[85]; Graff Zivin et al., 2020[86]; Park, 2020[87]). The resulting suboptimal educational and labour market sorting may alter long-term skill acquisition and earnings (Horvath and Borgonovi, 2022[88]; Kyndt et al., 2012[89]).

As socio-economically disadvantaged families and ethnic minority communities are more likely to live closer to pollution sources, such as toxic waste, where housing is more affordable, this can have a larger impact on the educational outcomes of disadvantaged student groups (Persico, 2019[90]). This is even more concerning in the Global South, where air pollution levels are higher, giving rise to growing challenges in offering suitable learning environments for students (World Bank, 2022[80]).

Developments in the area of equity and inclusion

An overview of the state of equity and inclusion in education systems across the OECD can provide an important starting point for this report's analysis. Indeed, without relevant information on the current state of equity and inclusion and progress achieved over the years in these areas, any analysis would only provide a partial picture. Yet, efforts to provide a comprehensive analysis of equity and inclusion face several challenges, stemming from measurement difficulties, complexity of the field, limited data availability, and more (as discussed more extensively in Chapter 6).

Data from PISA 2018 provides a first picture of the state of equity and inclusion of diverse student groups, namely in terms of socio-economic advantage and disadvantage, gender and immigration status. In terms of socio-economic status, PISA found that socio-economically advantaged students outperform disadvantaged ones across all OECD countries with available data. On average across OECD countries[6] the score difference between students in the top and bottom quarters of the ESCS[7] index was 89 points, with variations across countries. In terms of gender differences, the data shows a reading gap in favour of girls across all OECD countries in 2018, with an average difference of 29 points. The gap appears larger for students in the 10th (bottom) percentile, with an average of 41 points, compared to students that perform in the 90th percentile, who show a gap of 18 points. Lastly, in terms of immigration status, in almost all OECD countries there is a reading gap in favour of native students compared to immigrant students. On average, immigrant students performed 40 points lower than their native peers. This difference is

smaller, between the two groups, after accounting for gender, and students' and schools' socio-economic profile.

While this overview provides a static picture of the gaps in 2018, considering the trends over the past decade can provide important information regarding the evolution of these gaps. As countries have long considered the importance of improving their results and fostering equity in education and the inclusion of all students.

Table 1.1 provides an overview of evolution of the differences in scores between different groups from 2009 to 2018 (the specific values are provided in the Annex Table 1.A.1). The data show that gender is the only dimension of diversity that has seen a widespread evolution over this time period: it is the only dimension for which a large number of countries shows a significant reduction in the gap between girls and boys. No country displays a statistically significant increase in gender gaps in reading scores. Nevertheless, a wide variation of developments can be observed. In the Czech Republic, Estonia, Ireland, Poland, Slovenia and Sweden, the scores of boys and girls both increased, but it increased to a larger extent for boys, thus reducing the gender gap. In France, Germany, Italy, Latvia, Lithuania, Luxembourg, Mexico, Portugal, Republic of Türkiye and on average across OECD countries, reading scores for boys increased, but decreased for girls. Finally, in Hungary, Japan, New Zealand, the Slovak Republic and Switzerland, the scores of both groups decreased, but girls' performance to a larger extent, thus effectively also reducing the gender gap.

For the other two dimensions no clear pattern appears, as most changes are not significant and they are going in both directions. Notably, the Czech Republic, Finland and the Slovak Republic are the only countries that show a significant change between 2009 and 2018 in terms of socio-economic status of their students. While in the Czech Republic the scores of both groups increased over time (however more so for advantaged students, thus exacerbating the gap), the scores in Finland and the Slovak Republic decreased, but more so for disadvantaged students.

The immigration status variable shows mixed results: among the few countries with significant results, Italy and Luxembourg show a decrease in the gap between the two years. In both countries, the score of students with an immigrant background increased and the score for students without an immigrant background decreased, thus reducing the gaps. On the contrary, in the Netherlands, the scores for both groups decreased, but for students with an immigrant to a larger extent, thus increasing the gap. In Slovenia, the score of students with an immigrant background decreased while it increased for students without such background, thus also exacerbating the divide between the two groups.

Table 1.1. Differences in reading performance across groups of students

Changes from 2009 to 2018, by national quarter of socio-economic status, gender, and immigration status


Reduction in the gap between 2009 and 2018

Increase in the gap between 2009 and 2018

Country	Socio-economic status (top-bottom quarter)	Gender differences (girls - boys)	Immigrant status (immigrant - non-immigrant)
Australia			
Austria	*m*	*m*	
Belgium			

Country	Socio-economic status (top-bottom quarter)	Gender differences (girls - boys)	Immigrant status (immigrant - non-immigrant)
Canada			
Chile			*m*
Colombia			
Costa Rica			
Czech Republic			
Denmark			
Estonia			
Finland			
France			
Germany			
Greece			
Hungary			
Iceland			
Ireland			
Israel			
Italy			
Japan			*m*
Korea			*m*
Latvia			
Lithuania			
Luxembourg			

Country	Socio-economic status (top-bottom quarter)	Gender differences (girls - boys)	Immigrant status (immigrant - non-immigrant)
Mexico			
Netherlands*			
New Zealand			
Norway			
Poland			*m*
Portugal*			
Slovak Republic			*m*
Slovenia			
Spain	*m*	*m*	*m*
Sweden	*m*		
Switzerland			
Türkiye			*m*
United Kingdom			
United States*			
OECD average			

Note: *The Netherlands, Portugal and the United States: Data did not meet the PISA technical standards but were accepted as largely comparable (see PISA 2018 Annexes A2 and A4). Differences that are statistically significant are indicated in darker colours.
Source: OECD (2019[91]), PISA 2018 Results (Vol II), Annex B.1., https://doi.org/10.1787/b5fd1b8f-en.

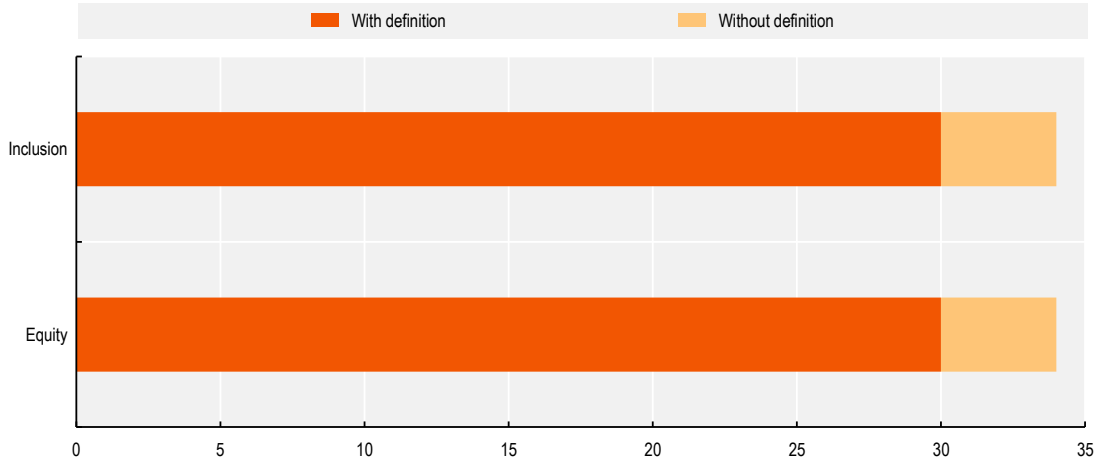
Conceptualising diversity, equity and inclusion in education

Defining the key concepts in the area of diversity, equity and inclusion in education is no easy undertaking. These concepts vary not only across literature, but also in the meaning that different education systems attribute to them. Indeed, there is neither a universal definition of equity nor of inclusion in education. The Strength through Diversity Project has adopted some definitions to operationalise the concepts and provide some basis for its analysis, but these are not meant to be normative or prescriptive for countries. Most countries and education systems have developed their own definitions, which reflect their history, priorities and educational goals.

Most jurisdictions across the OECD have a definition of equity and inclusion

The majority of education systems have a definition of both equity and inclusion (Figure 1.2). Twenty-eight jurisdictions reported in the Strength through Diversity Survey 2022 (see Annex 1.A) that they had a definition of equity, either formal or operational, and 30 have a definition of inclusion. Only four jurisdictions did not have a definition of inclusion (Australia, Finland, the Netherlands and New Zealand) and four did not have a definition of equity (Denmark, Finland, Lithuania and New Zealand).

Figure 1.2. Number of education jurisdictions with and without a definition of equity and inclusion



Note: This figure is based on answers to the question "If available, please provide an English translation of the definition of equity in education. Such definition(s) can be embedded in your legislative framework or can be part of document(s) published by a national (or sub-national) authority." and "If available, please provide an English translation of the definition of equity in education. Such definition(s) can be embedded in your legislative framework or can be part of document(s) published by a national (or sub-national) authority.". Thirty-four education systems responded to these questions.
Source: OECD (2022[92]), Strength through Diversity Policy Survey 2022.

StatLink https://stat.link/a6md94

An analysis of the definitions and explanations of concepts provided by education systems (reported in Annex 1.A) shows that commonalities exist across education systems in the adopted definitions of equity. Twenty-three of the 30 education systems that reported having a definition mentioned explicitly that education should be provided without prejudice to student characteristics, background or origins. These elements span across social status, nationality, ethnic origin, gender, special education need or disability, sexual orientation, religious and political affiliation, language, health condition, parent education and place of residence. In this regard, 12 systems highlighted that special efforts should be made to prevent discrimination in education. Fifteen education systems also underlined the importance of ensuring equality of opportunity between students. According to Slovenia's comprehensive definition, the notion of equal opportunity presupposes that each individual is treated in accordance with the law of justice - meaning that equals must be treated the same and others must be treated in accordance with their differences - in situations in which many people compete for limited resources (for example, acceptance into a quality school or university). Various systems, finally, underlined that access to education should be granted to all students (ten education systems), in order to avoid any gaps or differences between them (six), and allow them to achieve by removing barriers and obstacles (four). Additional points that were mentioned by a small minority of educations systems are reported in Table 1.2.

Table 1.2. Key elements mentioned by education systems' definitions of equity and inclusion

Equity		Inclusion	
Key elements mentioned by education systems' definitions	*Number of education systems*	*Key elements mentioned by education systems' definitions*	*Number of education systems*
Groups	23	For all	20
Equality of opportunity	15	Access/Participation	12
Discrimination/exclusion	12	Students with SEN	11
For all	10	Learning	10
Access	9	Groups	9
Differences/Gaps	6	Diversity	8
Potential/Achievement	6	Discrimination/exclusion	7
Barriers/obstacles	4	Mainstream education	7
Free	2	Support/Accommodation	6
Segregation	1	Equality of opportunity	6
Belonging	2	Barriers	6
Diversity	1	Development	5
		Social	4
		Process	3
		Quality	3
		Differences/Gaps	2
		Identity	2
		Belonging	2
		Participation of parents/community	2

Note: Text-analysis based on education systems' definitions and descriptions of equity and inclusion in education.
Source: OECD (2022[92]), Strength through Diversity Policy Survey 2022.

In relation to inclusion, the information reported in Annex 1.A shows the key elements that countries consider in their definitions. Out of the 30 countries that reported definitions in the Survey, 20 underlined that their understanding of inclusion concerns *all* students, without prejudice. Twelve countries also stressed the relevance of ensuring access and participation to the students to ensure their inclusion in education. In contrast to their approach to defining equity, several education systems (11) considered inclusion as concerning students with special education needs – at times exclusively and at times as a core but not exclusive focus. For instance, the concept of inclusion in the Flemish Community of Belgium "has a specific usage in that it refers to the leading principle for schools' approach to pupils with SEN". While Ireland does not have a general holistic definition on inclusion in education, it has a specific definition for the inclusion of students with SEN, which underlines that "a child with special educational needs shall be educated in an inclusive environment with children who do not have such needs unless the nature or degree of those needs of the child is such that to do so would be inconsistent". Seven countries highlighted the role of mainstream education in the inclusion of students with SEN.

Another common element, which is shared with the systems' definition of equity, was the focus on avoiding discrimination, with an explicit mention of various groups of students. However, it differs from equity as eight countries' definitions of inclusion made explicit reference to the concept of diversity. Colombia, Mexico and Scotland (United Kingdom), for instance, stressed the importance of valuing and respecting students' diversity.

A further difference is that inclusion definitions (for six education systems) stated the relevance of providing support and accommodations to students who require them, along with ensuring appropriate learning (ten systems) for all. Equality of opportunity was also mentioned by six education systems, as in the case of

equity, as the removal of barriers (six systems). Finally, three education systems stressed the idea of inclusion being a process, which is a key aspect of the definition proposed by UNESCO and adopted by the Strength through Diversity Project (as discussed in the next section). Three systems also highlighted the importance of ensuring the quality of the education provided in regard to inclusion, as it is not enough for children to be allowed into education if not provided with high-quality learning. Additional points that were mentioned by a small minority of educations systems are reported in Table 1.2.

Given that, as discussed, education systems' definitions vary widely, the Project has adopted specific definitions that allow for a shared understanding of the concepts when analysing policies and practices concerning equity and inclusion in education (Cerna et al., 2021[15]). These definitions are not meant to be prescriptive nor recommended for education systems to adopt, but reflect the main understanding of these areas in this report and throughout the work of the Project. The following sections describe the key concepts in the areas of equity and inclusion in education, and highlight the developments and principles that have led the Project to select these specific understandings.

Equity

The Strength through Diversity Project defines **equitable education systems** as being those that ensure the achievement of educational potential is not the result of personal and social circumstances, including factors such as gender, ethnic origin, Indigenous background, immigrant status, sexual orientation and gender identity, special education needs, and giftedness (Cerna et al., 2021[15]; OECD, 2017[13]). In operationalising equity in education, the OECD makes a distinction between horizontal and vertical equity (OECD, 2017[93]). While horizontal equity considers the overall fair provision of resources to each part of the school system (providing similar resources to the alike), vertical equity involves providing disadvantaged groups of students or schools with additional resources based on their needs (ibid.). Both approaches are complementary and play an important role in the process of inclusion of vulnerable groups of students (described below).

However, other organisations, projects and researchers adopt different definitions for the concept of equity, and for that of equality (Mezzanotte and Calvel, forthcoming[94]). For UNESCO, equity "considers the social justice ramifications of education in relation to the fairness, justness and impartiality of its distribution at all levels or educational sub-sectors" (UNESCO-UIS, 2018, p. 17[95]). UNESCO also defines the concept of **equality,** as "the state of being equal in terms of quantity, rank, status, value or degree". **Equality of opportunity**, in particular, is understood to mean that everyone should have the same opportunity to thrive, "regardless of variations in the circumstances into which they are born" (UNESCO-UIS, 2018, p. 17[95]). Having been granted such opportunities and considered their innate abilities, however, students' outcomes will still depend on how much effort they put in. This concept holds individuals accountable, as they are considered responsible for, and to have control over, their effort. This implies that the differences in outcomes that arise from differences in effort are fair, while those that derive from personal characteristics – such as socio-economic background or gender – are not fair. The definition adopted by the Project, as described above, is thus in line with the concept of equality of opportunity.

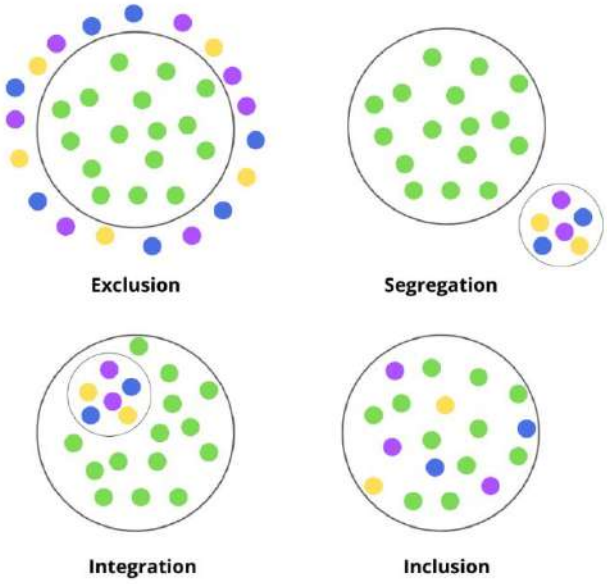
Inclusion

The OECD Strength through Diversity Project adopts a broad definition of **inclusive education**, while recognising that there exist various definitions of this concept and disagreements about these definitions (Cerna et al., 2021[15]). For the scope of this report and the broader work of the Project, inclusive education is defined as "an on-going process aimed at offering quality education for all while respecting diversity and the different needs and abilities, characteristics and learning expectations of the students and communities, eliminating all forms of discrimination" (UNESCO, 2009, p. 126[96]). More than a particular policy or practice related to a specific group of students or individuals, this definition identifies an ethos of inclusion and communities of learners, which does not only involve an individual dimension but also a

communal one. The goal of inclusive education is to respond to all students' needs, going beyond school attendance and achievement, while improving all students' well-being and participation (Cerna et al., 2021[15]).

Inclusion can also be conceptualised as a historical development of different models of education. Researchers generally categorise educational systems into four categories: exclusion, segregation, integration and inclusion (Figure 1.3)

Figure 1.3. Four types of educational model



Source: Mezzanotte (2022[48]), The social and economic rationale of inclusive education: An overview of the outcomes in education for diverse groups of students, https://dx.doi.org/10.1787/bff7a85d-en, adapted from Abt Associates (2016[97]), Summary of the evidence on inclusive education, https://www.abtassociates.com/sites/default/files/2019-03/A_Summary_of_the_evidence_on_inclusive_education.pdf (accessed 13 January 2022).

Firstly, **exclusion** occurs when students are directly or indirectly prevented from or denied access to education in any form. This may happen when students are not allowed to register or attend school, or conditions are placed on their attendance. Exclusion in education does not only mean "out-of-school children" but can have many expressions (International Bureau of Education, 2016[98]; UNESCO, 2012[99]). For instance, exclusion can be from entry into a school or an educational programme, due to inability to pay the fees or being outside the eligibility criteria. **Segregation** occurs when diverse groups of students are educated in separate environments (either classes or schools). This can happen, for instance, when students with a learning disability are forced to attend a school/class exclusively for students with disabilities, but also when schools teach either females or males only (i.e., same-sex or single-sex education). **Integration** is achieved by placing students with diverse needs in mainstream education settings with some adaptations and resources, on the condition that they fit into pre-existing structures, attitudes and an unaltered environment (UNESCO, 2017[100]). For example, integration can consist in placing a student with a physical impairment or a learning disability in a mainstream class but without any individualised support and with a teacher who is unwilling or unable to meet the child's learning, social or disability support needs. In literature and policy, integration and inclusion have been compared and sometimes confused, whereas the two concepts present significant differences.

Inclusion is a process that helps to overcome barriers limiting the presence, participation and achievement of all learners. It is about changing the system to fit the student, not changing the student to fit the system, because the "problem" of exclusion is firmly within the system, not the person or their characteristics (UNICEF, 2014[101]). According to UNICEF (2014[101]), inclusive education is defined as a dynamic process that is constantly evolving according to the local culture and context, as it seeks to enable communities, systems and structures to combat discrimination, celebrate diversity, promote participation and overcome barriers to learning and participation for all people. All personal differences (i.e., age, gender, ethnicity, Indigenous status, language, health status, etc.) are acknowledged and respected.

UNESCO (2008[102]) has also described the key factors of inclusive education for all students: i) the promotion of student participation and reduction of exclusion from and for education; and ii) the presence, participation and achievement of all students, but especially those who are excluded or at risk of marginalisation. The key message is that every learner matters and matters equally. Moreover, according to UNESCO (2005[103]), inclusion highlights the groups of learners who may be at risk of marginalisation, exclusion or underachievement, including students belonging to ethnic groups, national minorities or immigrant students, among others. UNESCO's interpretation also implies a moral responsibility to ensure that groups that are more statistically at risk are carefully monitored and steps are taken to ensure their presence, participation and achievement in education (UNESCO, 2005[103]).

Why it is relevant to differentiate between equity and inclusion

The concepts of equity and inclusion are strictly related and overlap, but they emphasise complementary elements that contribute to successful education systems. Equity stresses the role of providing the same opportunities to all students and equalising resources provided to support them. The goal of equity is to give the means to all students to achieve at the best of their capabilities.

A focus on educational equity may not be enough to fully address student diversity. Indeed, an exclusive focus on equity could lead to narrow assimilationist or isolationist policies and practices without fully addressing inclusion. For example, having all students achieving a minimum level of performance and meeting educational goals that are established without considering the diversity of their experiences (assimilation) can promote equity but not inclusion. Inclusion encompasses the principles of equity while broadening this focus through proposing a transformative approach to remove barriers for all students, stressing in particular the need to recognise and address different experiences, needs and challenges of diverse and vulnerable groups of students. While equity focuses on opportunities, inclusion is more strictly associated to who the individual is, i.e., their identity (e.g., cultural identity, gender identity), and whether the education system acknowledges individuals for who they are (i.e., the sense of belonging). Moreover, inclusion fosters students' well-being as a key element to ensure their full participation in education through the development of their self-worth and sense of belonging to schools and communities. Well-being is generally not as much of an explicit focus in relation to equity.

Improving equity does not necessarily result in the validation of an individual's sense of self and belonging within society. If that validation does not occur, it may hinder social cohesion on a larger scale and on a longer time frame. Educational research has brought about a better understanding of the necessity of responding to individual student needs by providing each learner with individualised feedback and providing inclusive and multicultural programmes (Nusche, 2009[104]). In this context, education systems cannot only play an important role in boosting equity, but also in fostering just and inclusive societies.

Why equity and inclusion in education matter

The importance of fostering equity and inclusion in educational settings has various rationales, spanning from human rights, to educational, individual and societal gains (Mezzanotte, 2022[48]). More equitable and inclusive education has been shown to provide benefits for all students in improving the quality of education

offered, as it is more child-centred and focused on achieving good learning outcomes for all students, including those with a diverse range of abilities (UNESCO, 2009[105]). Greater equity in education can help students achieve their potential, which can have implications on their outcomes later in life. A carefully planned provision of inclusive education can not only improve students' academic achievement, but also foster their socio-emotional growth, self-esteem and peer acceptance (UNESCO, 2020[83]). For instance, from a review by Ruijs and Peetsma (2009[106]), it appears that students with special education needs achieve academically better in inclusive settings than in non-inclusive settings. Research also shows that attending and receiving support within inclusive education settings can increase the likelihood of higher education enrolment for students with SEN (European Agency for Special Needs and Inclusive Education, 2018[107]). These settings are also beneficial for students that have no disability or impairment, since attending a class alongside a student with SEN can yield positive outcomes for their social attitudes and beliefs (Abt Associates, 2016[97]). Similarly, with the inclusion in education of students from ethnic groups and national minorities, young people have the opportunity, through repeated exposure and practice, to engage with others who differ from them. This interaction can promote feelings of satisfaction and social efficacy within the current school setting and inform future social interactions and social adaptability in college, communities, and the workplace (Nishina et al., 2019[51]). The inclusion of diverse students can thus help to fight stigma, stereotyping, discrimination and alienation in schools and societies more broadly (UNESCO, 2020[83]). The Salamanca Statement and Framework for Action (1994[108]) asserts that: "Regular schools with inclusive orientation are the most effective means of combating discrimination, creating welcoming communities, building an inclusive society and achieving education for all". As predicted by Contact Hypothesis (Allport, 1954[109]), increased inter-group contact can lead to a reduction of hostility, prejudice and discrimination between groups, which can refer to all types of diversity. Instead, a context that allows contact between diverse peers can build strong social skills, an important asset in today's diverse and international places of work.

Better academic and social outcomes for all students are correlated with improved labour outcomes later in life, as well as better health and well-being (Mezzanotte, 2022[48]). Literature has shown the correlation between skills earned in schools and income levels from the labour market (Hanushek and Woessmann, 2008[110]), and an even stronger correlation between the years of education achieved and the returns to education, through an increase in productivity or the signalling effect of education[8] (Hanushek and Woessmann, 2020[111]; Harmon, Oosterbeek and Walker, 2003[112]). Considering how important education and skills have become in the labour market, a critical question is whether such learning opportunities can be accessible to all. Previous OECD (2017[13]) work has found that countries have been advancing at different rates in providing quality education and skills development opportunities to disadvantaged individuals. In most countries, inequality in learning opportunities begins at birth, and often widens as individuals grow older (OECD, 2017[13]). These inequalities result in very different life outcomes for adults. In some countries, access to learning opportunities differs considerably between certain population groups, which highlights the need for more equitable and inclusion education systems.

Better education also provides a range of indirect benefits, which are also likely to entail positive economic consequences (Mezzanotte, 2022[48]). For instance, greater education is associated with better health status and increases in some aspects of social cohesion and political participation (OECD, 2006[113]). In terms of health, research shows that more years of education and higher levels of qualification are associated with a lower incidence of physical and mental disorders. These relationships have been shown to hold across different countries, income ranges, age and ethnic groups (OECD, 2006[113]).

These positive effects on individual outcomes also lead to broader societal benefits (Mezzanotte, 2022[48]). Economic literature has studied the role of education in rising incomes at the country level, in particular in terms of higher Gross Domestic Product (GDP) per capita and its annual growth rate (Bassanini and Scarpetta, 2001[114]; Hanushek and Woessmann, 2007[115]). Providing more education, knowledge and skills to individuals, i.e., accumulating human capital, increases their productivity and employability, which in turn rises the country's overall income and development. Individual non-economic outcomes also affect

society more generally: better education can contribute to reduced violence and crime rates, reductions in the cost of healthcare and welfare systems (e.g., unemployment benefits, etc.), and can foster innovation. Policies that support individuals in obtaining the highest qualifications of which they are capable have the potential to provide not only personal, but also economic, benefits. This includes both savings in national healthcare and socio-political costs, such as greater political engagement, higher levels of trust, and more positive inter-group attitudes (Easterbrook, Kuppens and Manstead, 2015[116]).

The World Bank also argues that equity and inclusion in education are essential for shared prosperity and sustainable development (Mezzanotte, 2022[48]; World Bank Group, 2016[117]). Disparities in education are one of the major drivers of income inequality, both within and among countries. Without basic education, individuals in the bottom of a nation's income distribution are unlikely to be successful in a globalised economy. As the World Bank World Development Report 2012 notes, fair and inclusive education is one of the most powerful levers for a more equitable society (World Bank, 2011[118]). While, as discussed, there are very important human, economic, social and political reasons for pursuing a policy and approach of more equitable and inclusive education, it is also a means of bringing about personal development and building relationships among individuals, groups and nations (UNESCO, 2005[103]). Inclusive education can further offer all children a chance to learn about and accept each other's abilities, talents and needs (Mezzanotte, 2022[48]). This process, through the fostering of meaningful relationships and friendships, can strengthen social competences while also building social cohesion (Council of Europe, 2015[53]). In an increasingly globalised and complex world, inclusive education can strengthen the trust and sense of belonging of people and among people.

Some scholars have raised concerns regarding the potential negative effects of an inclusive education system and the challenges in its implementation (Forlin et al., 2011[119]). For instance, a frequent argument against inclusive education is that it could have an adverse effect on the achievement of children without SEN (Mezzanotte, 2022[48]). The arguments against inclusion propose that students with SEN occupy the teachers' attention, which might adversely affect other children (Dyson et al., 2004[120]; Huber, Rosenfeld and Fiorello, 2001[121]). In contrast, proponents of inclusive education sustain that in inclusive classes there is more adaptive education, which might have a beneficial effect on all students (Dyson et al., 2004[120]). Overall, literature has identified mostly positive or neutral effects of inclusive education on the academic achievement of students without SEN, in particular at the lower education levels (Kart and Kart, 2021[122]). Evidence indicates that it is possible for all learners to achieve at high levels in an inclusive school system (AuCoin, Porter and Baker-Korotkov, 2020[123]; Mezzanotte, 2022[48]).

Diversity

Another important concept that relates to both equity and inclusion is diversity. Diversity corresponds to people's differences which may relate to their race, ethnicity, gender, sexual orientation, language, culture, religion, mental and physical ability, class, and immigration status (UNESCO, 2017[100]). More specifically, it refers to the fact that many people perceive themselves or are perceived to be different and form a range of different groups cohabiting together. Diversity is multidimensional, might relate to physical aspects and/or immaterial ones such as cultural practices, and makes sense according to the boundaries defined by groups of individuals.

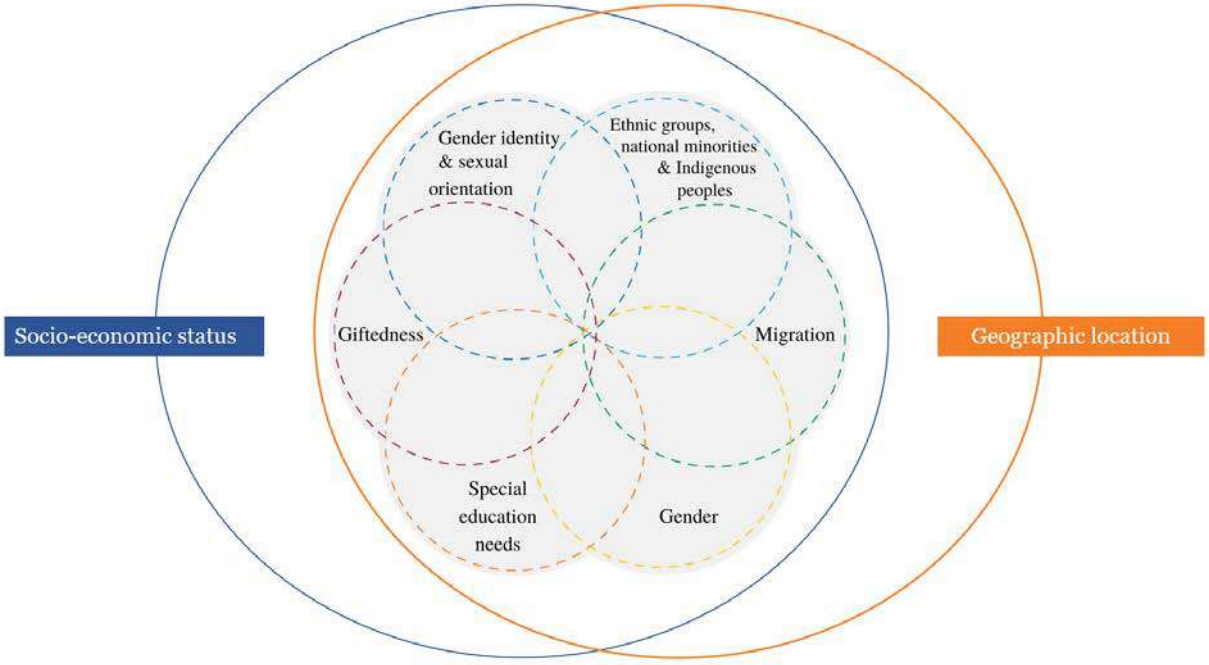
Students from diverse background are generally more disadvantaged in education, and, for this reason, become the target of equitable and inclusive reforms, practices and policies (Cerna et al., 2021[15]). As mentioned above, various countries emphasise the importance of focusing on specific groups of students and valuing their diversity in their definitions of equity and inclusion in education.

While acknowledging that many dimensions of diversity exist, the Strength through Diversity Project has focused on the following dimensions (Cerna et al., 2021[15]):

- Migration;
- Ethnic groups, national minorities and Indigenous peoples;
- Gender;
- Gender identity and sexual orientation;
- Special education needs;
- Giftedness.

Besides the six dimensions of diversity, the Project also considers the role of two overarching factors, namely students' socio-economic status and geographic location, as shown in Figure 1.4.

Figure 1.4. Dimensions of diversity



Source: Adapted from Cerna et al. (2021[15]), Promoting inclusive education for diverse societies: A conceptual framework, https://dx.doi.org/10.1787/94ab68c6-en.

The following sections first introduce the key concepts considered by the Project in relation to the six dimensions of diversity, followed by the two overarching factors that shape the educational experiences of students.

Migration

The Project considers the range of migration experiences that individuals may have, whether direct (foreign-born individuals who migrated) or not (individuals who have at least a parent or guardian who migrated) (Cerna et al., 2021[15]). Ancestry, intended as migration experiences that go beyond the parental generation, is not considered in itself, but reflected in analyses that consider ethnic groups and other national-minorities induced diversity.

The Project focuses on international migration as a source of migration-induced diversity, irrespective of reasons for migration and the legal status of the individual migrant, while reflecting on the educational implications of factors like legal status, migration experiences and age at migration. For the scope of the Project's analysis, individuals are considered to have an immigrant background or to have an immigrant-heritage if they or at least one of their parents was born in a country that is different from the country in which they access educational services (Cerna et al., 2021[15]; OECD, 2018[124]).

Ethnic groups, national minorities and Indigenous peoples

National minority is a complex term, for which no international definition has been agreed (Cerna et al., 2021[15]). It is therefore up to countries to define which groups constitute or not minorities within their boundaries. Minority groups can be categorised according to individuals' immigrant status and nationality of origins, but also depending on their ethnic affiliation and Indigenous background. While individuals can perceive themselves or be perceived as forming an ethnic group, they are not necessarily officially considered as a national minority in the country they live in. Roma communities for example, while being widely perceived as an ethnic group, are not always considered a national minority (Rutigliano, 2020[125]). National minority is also an administrative category and should be thought about as such. While being useful in data collection and policy making, it often does not reflect the complex diversity between and within different ethnic groups.

Ethnicity refers to a group or groups to which people belong, and/or are perceived to belong, as a result of historical dynamics as well as certain shared characteristics (Cerna et al., 2021[15]). With variations between different contexts, these characteristics can correspond to geographical location and ancestral origins, cultural traditions, religious beliefs, social norms, shared heritage and language. As ethnicity has its basis in multiple social characteristics, it is not deterministically defined and someone can be a member of an ethnic group even if they differ from other group members on some dimensions. Ethnic affiliation might ultimately depend on the agency of an individual who chooses to be part of a specific ethnic group and, as such, places their identity in the context of a broader social group. This affiliation can be non-exclusionary and change over the life course, as individuals choose to adopt or reject such affiliation. Finally, ethnicity is fundamentally a criterion of differentiation that can be both a source of recognition and valorisation, and of inequalities and discrimination.

The concept of **race** is close to the notion of ethnicity and the boundaries between both are often blurry (Cerna et al., 2021[15]). However, race as a concept has been deconstructed since the second half of the 20th century, mostly through a worldwide UNESCO campaign in the 1950s, upheld by renowned anthropologists. It was shown that the concept of race, besides bearing a strong negative connotation in numerous countries (e.g., European countries), has little biological basis as biological differences across individuals from different racial groups are minuscule. It was highlighted that racial differences across individuals would have no bearing on education policy if it were not for their overlap with ethnic differences and for the structural discrimination faced by members of certain "visible"[9] minority groups both in education settings and society more widely. It is important to acknowledge that some countries commonly use the notion of race in political and academic languages. However, its social origins rather than its biological bases are usually emphasised. Within the Project, the diversity related to the aforementioned characteristics is referred to as *ethnicity* and *ethnic diversity*, and the terms *race* and *racial diversity* are not used.

Indigenous peoples, according to the United Nations' definition, are those who inhabited a country prior to colonisation, and who self-identify as such due to descent from these peoples and belonging to social, cultural or political institutions that govern them (United Nations, 2019[126]). The colonisation process in some countries has had a double impact on Indigenous peoples and in particular on children in relation to education. In addition to undermining Indigenous young people's access to their identity, language and culture, colonisation has resulted in Indigenous children generally not having had access to the same

quality of education that other children in their country have enjoyed. These two factors have generally undermined the opportunities and outcomes of various generations of Indigenous peoples and children, and still affect these populations today. Education systems may need interventions on their general design, to recognise and respond to the needs and contexts of Indigenous students (OECD, 2017[127]).

Students from ethnic minority groups and Indigenous communities are different groups, and may require varying policy responses based on their specific needs. Nonetheless, they often face similar challenges when it comes to education.

Gender

Although the words "sex" and "gender" are often used interchangeably, their definitions are different (Brussino and McBrien, 2022[128]). Sex refers to the biological and physiological characteristics of being male or female, such as reproductive organs and hormones (Council of Europe, 2019[129]). Gender involves social roles and relationships, norms and behaviours that boys and girls are informally taught, such as how they should interact with others, what they might aspire to become and what opportunities they might expect, based on their sex (ibid.). These socially determined roles and behaviours may or may not correlate with the sex assigned at birth. The Council of Europe has defined gender as "socially constructed roles, behaviours, activities and attributes that a given society considers appropriate for women and men" (Council of Europe, 2011[130]). The World Health Organisation (WHO) states that the "characteristics of women, men, girls and boys that are socially constructed" include "norms, behaviours and roles associated with being a woman, man, girl or boy, as well as relationships with each other. As a social construct, gender varies from society to society and can change over time" (WHO, 2018[131]). Gender differs from sex as the latter refers to "the different biological and physiological characteristics of females, males and intersex persons, such as chromosomes, hormones and reproductive organs" (WHO, 2018[131]).

In education, gender gaps have historically favoured males. However, over the past century, many countries have made significant progress in narrowing and even closing, long-standing gender gaps in educational attainment and today males on average have lower attainment and achievement than females in many OECD countries (Borgonovi, Ferrara and Maghnouj, 2018[132]).

Gender identity and sexual orientation

"Sexual and gender minorities" refers to LGBTQI+ people, that is, lesbian, gay, bisexual, transgender, queer and intersex individuals. The "+" is often added to the LGBTQI acronym to include people who do not self-identify as heterosexual and/or cisgender but who would not apply the LGBTQI label to themselves either. These people include questioning individuals, pansexual individuals, or asexual individuals (OECD, 2020[133]). While the notion of gender has shifted towards a more inclusive definition, away from a binary and heteronormative understanding, policy makers and educators are facing new challenges regarding inclusion in schools. Gender is increasingly being acknowledged as a spectrum, and gender identity refers to a person's internal sense of being masculine, feminine or androgynous. Sexual orientation corresponds to the sexual and emotional attraction for the opposite sex, the same sex or both (Cerna et al., 2021[15]).

Studies show that LGBTQI+ people tend to suffer from significant social exclusion. In most OECD countries, they are still stigmatised and suffer various forms of discrimination, including in education (OECD, 2019[134]). While there is little research on the difference of educational achievement between LGBTQI+ students and the rest of the population, various studies have shown that these students are greatly exposed to bullying and tend to feel unsafe in the classroom (UNESCO, 2016[135]). This phenomenon also affects heterosexual and cisgender individuals who are perceived as non-conforming to gender norms (ibid.). It highlights both a significant lack of inclusion of these people and a persisting rigidity of mainstream gender representations.

There is growing evidence that more inclusive measures at school level, such as a curriculum that contains references to gender fluidity, coupled with broad anti-discrimination laws and policies are key in fostering tolerance and the long-run socio-economic inclusion of LGBTQI+ people (Cerna et al., 2021[15]).

Special education needs

Special education needs (SEN) is a term used in many education systems to characterise the broad array of needs of students who are affected by disabilities or disorders that affect their learning and development (Brussino, 2020[136]; Cerna et al., 2021[15]). As there is no universal consensus on which disorders and impairments can cause a special education need, and each country adopts its own classification, the Project has grouped them into three broad categories: learning disabilities, physical impairments and mental disorders.

Learning Disabilities are disorders that affect the ability to understand or use spoken or written language, do mathematical calculations, coordinate movements, or direct attention (Brussino, 2020[136]; Cerna et al., 2021[15]). They are neurological in nature and have a genetic component. The severity of symptoms varies greatly across individuals because condition specific intensity differs in relation to co-morbidity. Learning Disabilities are independent of intelligence: individuals with average or high performance in intelligence tests (such as IQ tests) can suffer from one or multiple learning disabilities and as a result struggle to keep up with peers in school without support. The most common learning disabilities are: dyslexia, dyscalculia, dysgraphia, and Auditory Processing Disorder (APD).

Physical Impairments affect the ability of individuals to access physical spaces due to reduced mobility or to access information that is delivered in specific ways: visual delivery for visual impairments and voice/sounds for hearing impairments. In the case of hearing impairments, the production of information via sounds can also be compromised. The severity of symptoms can vary and technological/physical aids can ensure that individuals with such impairments are able to access learning in standard school settings. Physical impairments can either have hereditary components or be the result of specific diseases or traumatic events that produce long-lasting physical consequences. The most common physical impairments are mobility impairments, visual impairments and hearing impairments (Brussino, 2020[136]; Cerna et al., 2021[15]).

Mental health. In recent years, students' mental health and its interaction with educational systems and services have received increasing attention (Brussino, 2020[136]; Cerna et al., 2021[15]). Poor mental health can be both a consequence of lack of support for students experiencing disabilities and impairments, as well as a distinct medical condition hampering students' academic progress and broader well-being. Due to the stigma associated with mental health conditions, many students in school suffer from mental health conditions that are long-standing and severely limiting. The experiences that children have in school can also be partially responsible for the onset of specific mental health conditions, for example due to the experiencing of bullying, social isolation and stress. The most common mental health conditions affecting children in school include:

- Developmental disorders, such as Attention-Deficit/Hyperactivity Disorder (ADHD), Autism Spectrum Disorder and Tourette's Syndrome;
- Depressive Disorders;
- Anxiety Disorders;
- Disruptive, Impulse-Control and Conduct Disorder (Oppositional Defiant Disorder - ODD, Conduct Disorder).

Giftedness

Gifted students are students who have been classified as having significantly higher than expected intellectual abilities given their age, with intellectual abilities being assessed through psychometric tests of cognitive functioning and/or performance in classroom evaluations. The specific methods (tests, portfolios, observations) used to identify giftedness vary greatly across countries and within countries and so do the specific cut-offs used to evaluate giftedness. Other conceptions of giftedness encompass more liberal or multi-categorical approaches that point out the limitations of describing intelligence in a unitary way (Murphy and Walker, 2015[137]). Students can also be considered to be gifted in specific domains that are not strictly academic in nature, such as music, sports and arts.

In conversations about educational policy and issues of equity and inclusion, gifted learners tend to occupy a marginal space. This marginalisation mostly stems from the assumption that in displaying signs of exceptionality and high intelligence, learners identified as gifted will inevitably achieve educational success without additional support. In reality, however, gifted students can happen to be left behind and underserved in classrooms unable to meet their specific educational needs (Rutigliano and Quarshie, 2021[138]).

The role of socio-economic condition and geographical location

Besides the six main dimensions of diversity, the Project accounts for the role that socio-economic variations play in educational outcomes. The effect of socio-economic background is observed in most countries and education is both the result and the determinant of socio-economic stratification (OECD, 2019[91]).

The Project examines the extent to which socio-economic condition determines the outcomes and opportunities different groups of students have and the extent to which legislative and organisational features in different education systems are more or less supportive of students' learning (Cerna et al., 2021[15]). In particular, it analyses socio-economic status as a lens through which other forms of diversity can be "distorted" and it uses it to evaluate the degree of equity and inclusivity of education systems.

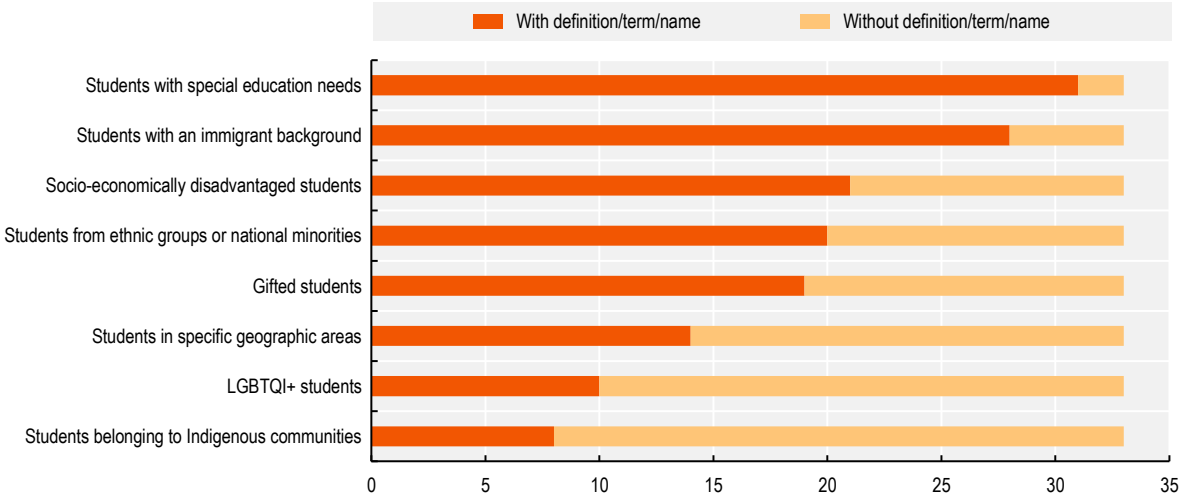
Socio-economic status is not the only overarching dimension that determines the parameters through which equity and inclusion operate in education systems: the geographical dispersion of different social and demographic groups and of schools plays an equally relevant role (as discussed in the section on Contextual developments shaping diversity, equity and inclusion in school education) (Cerna et al., 2021[15]). If different social and demographic groups are located in specific areas of a country or of a city, creating classrooms that reflect the broad heterogeneity of the overall population and curricula that build upon such diversity can be challenging. Similarly, the location of school, particularly lower and upper secondary schools, which tend to be fewer, bigger and more specialised than primary schools, can have an important bearing on how inclusive an education system can be.

OECD education systems focus on different dimensions of diversity, depending on their national context

Education systems across the OECD attribute an official or administrative term/name to different groups depending on their context and priorities. While their terminology does not always overlap with that of the Project, groups have been proxied to match the eight groups discussed earlier. Figure 1.5 shows that the majority of education systems that responded to the Survey attributed an official or administrative term/name to different diversity groups.

Figure 1.5. Definitions of dimensions of diversity (2022)

Number of education systems that indicated that they attribute an official or administrative term/name or have definitions of the following groups of students (ISCED 2)



Note: This figure is based on collated answers to the question "Please select all the student groups to which your education jurisdiction attributes an official or administrative term/name. This administrative term/name does not have to be embedded within the education jurisdiction, but can be part of other (e.g., social, health) jurisdictions." and "If available, please provide English translations of formal definitions for the following groups at ISCED 2 level. Such definitions can be embedded in your legislative framework or can be part of documents published by a national (or sub-national) authority.". Thirty-three and thirty-one education systems responded to these questions respectively. Response options were not mutually exclusive. Some education systems use terms that have been proxied for the categories considered by the Strength through Diversity Project, although their definitions do not overlap exactly.
Options selected have been ranked in descending order of the number of education systems.
Source: OECD (2022[92]), Strength through Diversity Policy Survey 2022.

StatLink https://stat.link/oa248z

A large number of education systems (31) referred having a term for students with SEN. The understanding of this term varies quite significantly across systems. While some jurisdictions focused on disability or more medical understandings of SEN (e.g., the Flemish Community of Belgium or Sweden), others considered more generally the additional learning needs of the students. Portugal, for instance, abandoned the system of categorisation of students in 2018. While used as a proxy in Figure 1.5, the term "special education needs" is therefore no longer used, having been replaced by "students in need of educational support measures". Similarly, Scotland (United Kingdom) adopts the term "students with Additional Support Needs" This definition is broad and applies to children or young people who, for whatever reason, require additional support, in the long or short term, in order to help them make the most of their school education and to be fully included.

Similarly, a large number of education systems, 28, adopted a term for students with an immigrant background. Many of these systems, however, identify these students through different proxies. Generally, systems identify students based on them holding a different nationality or speaking a different mother-tongue/have language learning needs. For instance, the Czech Republic considered students with an immigrant background as belonging to one of two groups: "foreigner pupils", as determined by foreign citizenship; and "students with insufficient knowledge of the language of instruction".

Other systems, instead, had more detailed classifications that cover several groups of students with and immigrant background. Slovenia, for instance, had a number of group classifications:

- Former migrants who hold Slovenian citizenship: persons born in the Republic of Slovenia and living in Slovenia since birth (second and third generation migrants whose mother tongue is not Slovenian), or persons not born in Slovenia who obtained Slovenian citizenship;
- Persons who do not hold Slovenian citizenship, namely persons who obtained a permit for permanent residence in the Republic of Slovenia and persons with permit for temporary stay in the Republic of Slovenia;
- Asylum-seekers and persons under international protection;
- Citizens of member states of the European Union;
- Children of Slovenian emigrants and workers abroad (with or without Slovenian citizenship) who returned to Slovenia.

According to the country's Basic School Act children who are foreign citizens or stateless persons and reside in the Republic of Slovenia have the right to compulsory basic school education under the same conditions as citizens of the Republic of Slovenia.

Twenty education systems also adopted terminology for ethnic groups and national minorities. In Europe, a large proportion of countries identify the Roma community, with different national declinations of the term and group, such as Travellers, Sinti, and more (an in-depth description of European classifications of Roma individuals is provided in Rutigliano (2020[125])). Other systems also identified as minorities groups that are linked to different country origins. Finland, for instance, considered Kvens/Norwegian Finns (people of Finnish descent in northern Norway) and Forest Finns (Finnish people who settled in Norway). Japan also specifically identified Koreans living in Japan, and Slovenia the members of the native Italian and Hungarian national communities.

Twenty-one and 14 systems adopted specific terms for students from a socio-economically disadvantaged background and students in specific geographic areas respectively. Across different systems, socio-economic status was generally proxied on a threshold for family income levels, established based on whether families are eligible or receive social assistance benefits, proxied on parents' employment status/education level/standardised set of home possessions, or on a combination of these indicators (18 systems) (Varsik, 2022[139]). Specific geographic areas were identified by systems in terms of: i) being remote areas (12 systems); the socio-economic level or development of the area (9 systems); and specific Regions/Provinces/States (9 systems) (ibid.). Several educations systems considered more than one of these categories (ibid.).

Nineteen systems also identified gifted students, although the terminology adopted varies among them (as discussed in Rutigliano and Quarshie (2021[138])). Ireland, for example, defined "exceptionally able students", while Scotland (United Kingdom) defined them as "highly able". Instead, Türkiye and the United States respectively adopted the term "talented" and "gifted and talented" students.

LGBTQI+ students and Indigenous students were the two groups that are reportedly less often identified by OECD education systems. Respectively, ten and eight systems adopted a specific term for these two groups.

Intersectionality

There are many possible intersections between dimensions of diversity, but also with overarching factors such as socio-economic status and geographical location (Cerna et al., 2021[15]). The term intersectionality is based on Crenshaw's (1989[140]) work on gender and ethnicity and has been widely used in other areas in recent years (Davis, 2008[141]; Lutz, Herrera Vivar and Supik, 2011[142]). Identities overlap and intersect with new implications for educational policies. In the area of diversity and inclusion, the Project understands

intersectionality to mean that a person can embody multiple dimensions of diversity and, as such, be exposed to the different types of discrimination and disadvantages that occur as a consequence of the combination of identities (Lavizzari, 2015[143]). It explores how the six dimensions intersect with one another and with the overarching factors of socio-economic status and geographic location (e.g., if student attends school in an urban or rural area). More discussion on intersectionality is provided in Chapter 2.

Holistic framework for diversity, equity and inclusion

This report supports the view that diversity, equity and inclusion in education systems need to be approached holistically, building on their interdependencies in order to generate complementarities and prevent inconsistency of objectives. This chapter illustrates the synergies that can be generated between the different components in response to the overarching policy questions of the Strength through Diversity Project (Cerna et al., 2021[15]):

- "How can education systems support the learning and well-being outcomes of diverse populations and make systems more inclusive?" and
- "How can education systems support all individuals so that they are able to engage with others in increasingly diverse and complex societies?"

Assessing the equity and inclusiveness of education systems is a complex process that involves a range of policy areas and requires a comprehensive analytical approach and great care in the use of concepts (Cerna et al., 2021[15]). In particular, assessing the equity and inclusiveness of education systems requires the adoption of a holistic approach to diversity, equity and inclusion in education. This entails breaking out of policy silos and connecting them into a structured policy framework linking key areas for diversity, equity and inclusion in education (ibid.).

The Strength through Diversity Project examines comprehensively if and how education systems can ensure that societies are well-equipped to provide equitable and inclusive educational opportunities. As such, it considers the specific vulnerabilities and assets some students may experience because of their background and circumstances and how best education systems can reduce the prevalence or the effects of risk factors for academic underachievement and low overall well-being. This comprehensive and innovative analytical framework can guide countries in developing education systems that are responsive to the needs of diverse populations, as contextualised in this chapter. The holistic framework has been developed based on a thorough review of prior work conducted by the OECD on equity and fairness in education and has used the review to critically identify and examine points of departure and unanswered questions for the conceptualisation of inclusive education. In particular, the holistic framework extends the existing theoretical underpinnings of OECD work on equity in education.

As mentioned above, the framework examines six dimensions of diversity (i.e., migration; ethnic groups, national minorities and Indigenous peoples; gender; gender identity and sexual orientation; special education needs; and giftedness) and their intersections. To ensure inclusive and equitable approaches in education systems, reflecting on the following elements is key:

- That an overall, systemic framework for governing diversity, equity and inclusion in education is designed (Issue 1: Governance).
- That resources are used effectively to support diversity, equity and inclusion in education (Issue 2: Resourcing).
- That the system is able to build capacity for all stakeholders to support diversity, equity and inclusion in education (Issue 3: Capacity Development).
- That schools provide effective interventions to support diversity, equity and inclusion in education (Issue 4: School-level Interventions).

- That processes and outcomes are monitored and evaluated to support diversity, equity and inclusion in education (Issue 5: Monitoring and Evaluation).

The five main issues are organised in policy areas and described below. They are also presented in Table 1.3 below.

Table 1.3. Policy areas to analyse diversity, equity and inclusion in education systems

1. Governing diversity, equity and inclusion in education	2. Resourcing diversity, equity and inclusion in education	3. Developing capacity for managing diversity, equity and inclusion in education	4. Promoting school-level interventions to support diversity, equity and inclusion in education	5. Monitoring and evaluating diversity, equity and inclusion in education
1.A Educational **goals** and curricula for equity and inclusion	**2.A General distribution** of resources and diversity in education	**3.A Awareness** of diversity in education at the system level	**4.A Matching resources** within schools to individual student learning needs	**5.A Monitoring and Evaluation** of **outcomes** of diversity, inclusion and equity in education at the system level
1.B Regulatory framework for diversity and inclusion in education	**2.B Targeted distribution** of resources	**3.B Recruitment, retention, preparation and evaluation** of school staff	**4.B Learning strategies** to address diversity	**5.B Evaluating processes** for diversity, inclusion and equity in education at the local and school level
1.C Responsibilities for and **administration** of diversity in education		**3.C Preparation of all students** for diversity in education	**4.C Non-instructional support** and **services**	
1.D Education provision to account for diversity in education			**4.D** Engagement with **parents** and **communities**	

Source: Adapted from Cerna et al (2021[15]), Promoting inclusive education for diverse societies: A conceptual framework, OECD Education Working Paper No 260, https://dx.doi.org/10.1787/94ab68c6-en.

Issue 1: Governing diversity, equity and inclusion in education

This issue is concerned with how diversity, equity and inclusion are governed in education. One aspect concerns how diversity, inclusion and equity are influenced by the key foundations of education systems. This relates to system features, such as educational goals and student learning objectives (including curriculum policies) and the regulatory framework for diversity and inclusion (e.g., recognition of diversity and the need for specific provisions, rights of specific student groups). Another aspect concerns the responsibilities for and the administration of diversity (e.g., distribution of responsibilities, stakeholder engagement, organisation and supervision), and the education provisions to account for diversity including diversity offerings, learning environment, choice and selection. This policy area is discussed in Chapter 2.

Issue 2: Resourcing diversity, equity and inclusion in education

This issue is concerned with how diversity, equity and inclusion are resourced in education. One aspect examines the general distribution of resources for diversity in education (e.g., funding formulas). Another aspect deals with targeted distribution of resources including matching human resources to schools and programmes to fund provisions for specific student groups. This policy area is examined in Chapter 3.

Issue 3: Developing capacity for managing diversity, equity and inclusion in education

This issue is concerned with how to develop capacity for managing diversity, equity and inclusion in education. One aspect concerns building awareness of diversity in education at the system level among all students and across society. Another aspect relates to the recruitment, retention, preparation and evaluation of school staff such as teachers, school leaders and support staff. It also concerns professional learning and mentoring. A third aspect concerns the preparation of all students for diversity including student-to-student mentoring. This policy area is discussed in Chapter 4.

Issue 4: Promoting school-level interventions to support diversity, equity and inclusion in education

This issue is concerned with how to promote school-level interventions to support diversity, equity and inclusion in education. One aspect concerns the matching of resources within schools to individual student learning needs (including allocating teacher resources within schools [e.g., class size], use of space, use of time, Information Communication Technology [digital technologies] resources) and learning strategies to address diversity (e.g., student assessment including diagnostic assessment, individualised learning, classroom strategies and use of technology). Another aspect relates to non-instructional support and services (e.g., career counselling, personal counselling, medical and therapeutic services) and engagement with parents and communities. This policy area is examined in Chapter 5.

Issue 5: Monitoring and evaluating diversity, equity and inclusion in education

This issue is concerned with how to monitor and evaluate diversity, equity and inclusion in education. One aspect relates to the monitoring and evaluation of outcomes of diversity, equity and inclusion at the system level (such as evaluation of policies and programmes targeted at equity and inclusion, development of indicators, reporting on outcomes). Another aspect concerns evaluating processes for equity and inclusion and equity at all levels, including the evaluation of schools and local education administration and their role in achieving equity and inclusion. This policy area is discussed in Chapter 6.

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Annex 1.A. Methodologies and definitions

Strength through Diversity Survey Methodology

On 15 March 2022, the Strength through Diversity Project (hereinafter "Project") asked OECD countries to respond to the Strength through Diversity Policy Survey (hereinafter "Survey"). The Survey aimed to collect comparative information on education systems' policies for equity and inclusion, and provide a unique opportunity to compare education jurisdictions' definitions, data collection policies and practices in the areas of equity and inclusion. No such comparable data is regularly collected from OECD countries.

The Survey was divided in four modules with 39 items. The first three modules were content-related: module 1 regarded definitions and information on data collection; module 2 concerned the policy framework of the education system; and module 3 included a couple of items about intersectionality. Module 4 contained a few follow-up questions on the Survey. Countries were asked to fill out the Survey considering lower secondary education (ISCED 2) as the education level of reference.

Countries in which education is a devolved responsibility were asked to fill out a separate response for each sub-national entity. Some countries decided to follow this advice (Belgium and the United Kingdom), while others collated the information and sent one response (e.g., Australia, Canada and the United States). Given the combination of national and sub-national entities in the Survey responses, we refer to the responding participants as "education systems".

Education systems were responding to the Survey in an electronic format using LimeSurvey between March and August 2022. In total, 34 education systems submitted responses: Australia, Canada, Chile, Colombia, Czech Republic, Denmark, England (United Kingdom), Estonia, Flemish Community (Belgium), Finland, France, French Community (Belgium), Greece, Iceland, Ireland, Italy, Japan, Korea, Latvia, Lithuania, Luxembourg, Mexico, the Netherlands, New Zealand, Northern Ireland (United Kingdom), Norway, Portugal, Scotland (United Kingdom), Slovak Republic, Slovenia, Spain, Sweden, Türkiye and the United States. Six OECD countries did not participate in the Survey: Austria, Costa Rica, Germany, Hungary, Israel and Poland. Given that policy contexts change in time, it is important to regard this information as representative of the year 2022 (school year 2021/22) in the participating education systems. In some cases, education systems provided additional information using the available text boxes or via email. These are used to complement and specify quantitative information.

Despite a wide coverage of OECD education systems, not all items were equally responded to. Therefore, caution needs to be exercised when generalising these results beyond the education systems covered in the responses.

Annex Table 1.A.1. Difference between 2009 and 2018 in diverse student groups gaps

Country	Difference 2018 - 2009					
	Top - Bottom quarter ESCS		Gender differences (girls - boys)		Immigrant status (immigrant - non-immig)	
	Diff.	S.e.	Diff.	S.e.	Diff.	S.e.
Australia	-2	(5.7)	-5	(4.0)	2	(6.8)
Austria	m	m	m	m	-6	(8.1)
Belgium	-5	(6.5)	-5	(5.4)	-6	(7.5)
Canada	1	(5.9)	-5	(2.9)	-4	(4.7)
Chile	-5	(8.0)	-2	(5.5)	m	m
Colombia	-4	(10.8)	1	(5.0)	-43	(28.2)
Costa Rica	3	9	0	4	6	8
Czech Republic	**21**	(8.2)	**-15**	(5.1)	31	(16.2)
Denmark	-3	(6.3)	1	(4.1)	2	(5.5)
Estonia	2	(7.8)	**-14**	(3.6)	4	(7.9)
Finland	**18**	(6.7)	-4	(3.6)	23	(14.6)
France	-3	(10.5)	**-15**	(4.8)	-8	(11.1)
Germany	9	(8.8)	**-14**	(4.9)	7	(8.3)
Greece	-7	(9.1)	-5	(5.5)	-6	(12.4)
Hungary	-4	(10.2)	**-11**	(5.7)	-1	(12.9)
Iceland	13	(8.0)	-4	(4.8)	-7	(14.2)
Ireland	-10	(7.9)	**-16**	(5.8)	-15	(8.2)
Israel	18	(9.1)	6	(7.8)	9	(8.8)
Italy	-10	(7.3)	**-21**	(4.2)	**-30**	(6.8)
Japan	-2	(8.7)	**-18**	(8.0)	m	m
Korea	7	(9.5)	-12	(7.7)	-7	(12.2)
Latvia	2	(7.8)	**-15**	(4.2)	-3	(15.5)
Lithuania	5	(7.2)	**-20**	(3.5)	**-17**	(4.1)
Luxembourg	7	(6.9)	**-10**	(3.2)	-3	(16.7)
Mexico	-2	(8.0)	**-14**	(3.0)	**26**	(10.8)
Netherlands*	9	(9.0)	5	(4.0)	-11	(6.7)
New Zealand	-7	(7.7)	**-17**	(5.6)	0	(7.2)
Norway	4	(7.4)	0	(4.1)	m	m
OECD average	1	(8.3)	**-9**	(4.7)	-1	(10.1)
Poland	2	(8.4)	**-17**	(3.6)	6	(10.8)
Portugal*	8	(8.5)	**-14**	(3.7)	m	m
Slovak Republic	**20**	(9.6)	**-17**	(4.9)	**16**	(8.0)
Slovenia	-8	(6.7)	**-13**	(3.5)	m	m
Spain	m	m	m	m	m	m
Sweden	-2	(9.0)	**-11**	(3.9)	17	(9.3)
Switzerland	11	(9.7)	**-8**	(3.8)	4	(5.9)
Türkiye	-16	(10.1)	**-18**	(5.3)	m	m
United Kingdom	-12	(7.4)	-5	(5.8)	-3	(8.8)
United States*	-8	(10.2)	-1	(4.9)	-15	(8.1)

Note: *The Netherlands, Portugal and United States: Data did not meet the PISA technical standards but were accepted as largely comparable (see PISA 2018 Annexes A2 and A4). Differences that are statistically significant are indicated in bold.
Source: OECD (2019[91]), PISA 2018 Results (Vol II), Annex B.1., https://doi.org/10.1787/b5fd1b8f-en

Annex Table 1.A.2. Definitions of equity

Education system	Is there a definition of equity in education?	Definitions of equity in education
Australia	Yes	There is no national definition of equity in education in Australia. However, it has been described and defined in a number of ways depending on the purpose. For example, The Equity and Excellence in Australian Schools review defined it as "ensuring that differences in educational outcomes are not the result of differences in wealth, income, power or possessions". This definition recognised that not all students are the same or can achieve the same outcomes; rather it meant equity of access for all students to a high-quality education. To facilitate the analysis of equity, in national reporting student outcomes are usually disaggregated (where data is available) by priority equity cohorts, which can include reporting by gender, Indigenous status, language background other than English, geographic location, socio-economic status, parental occupation, parental education and disability.
Canada	Yes	In Canada, equity and inclusion in education is described and defined at the provincial and territorial levels to serve regional and local needs and contexts.
Chile	Yes	The Ministry of Education refers to cultural diversity when dealing with equity and inclusion. Cultural diversity refers to the wealth that for centuries the different tribes, ethnic groups, peoples and countries have built, and to the evolution of thoughts, technologies, religions, ideologies and all the elements described in the exposed definition of culture that in general reflect the complexity of individual and collective identities in a particular historical context. With regard to this richness, in 2001, the UNESCO Universal Declaration on Cultural Diversity was adopted, which identifies cultural pluralism and establishes that a common heritage of humanity should be recognised. Valuing cultural diversity ultimately refers to the respect for the dignity of each individual, and to the respect for human rights in their highest expression of an ethical principle.
Colombia	Yes	Permanent process that enables, recognises, values and responds appropriately to the diversity of characteristics, interests, possibilities and expectations of children, adolescents, young people and adults. It focuses on promoting the comprehensive development and participation of all people in a learning environment without any discrimination or exclusion, guaranteeing, within the framework of human rights, the support and reasonable adjustments required, reducing the gaps, through practices, policies and cultures that eliminate existing barriers in the educational context.
Czech Republic	Yes	The topic of equality of access to quality education is one of the main goals of the Strategy for the Education Policy of the Czech Republic 2030+. It defines measures to be implemented to improve the situation regarding access to quality education for all, regardless of their socio-economic status. It also focuses on strengthening the competences of school leaders and teachers, which will contribute to the development of the potential of all students, including with regard to equal opportunities (independent of gender, race, skin colour, ethnic or social origin, genetic features, language, religion or beliefs, political opinions or any other opinions, belonging to a national minority, disability, age, and sexual orientation).
England (UK)	Yes	Under the Equality Act 2010, schools must not discriminate against a pupil in a number of respects, because of a characteristic protected by the Act – including race. State-funded schools are also subject to the Public Sector Equality Duty which requires public bodies, in exercise of their functions, to have due regard to the need to eliminate discrimination, harassment, victimisation and other conduct prohibited by or under the Act; advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it; and foster good relations between persons who share a relevant protected characteristic and persons who do not share it. We have published guidance for schools on how to comply with their duties under the Equality Act 2010 - Equality Act 2010: advice for schools - GOV.UK (www.gov.uk).
Estonia	Yes	There is no specific definition for equity in education but the principles are embedded in the various laws and legislative Acts, e.g., pursuant to the §37 and §12 of the Constitution of the Republic of Estonia, everyone has the right to education and is equal before the law and may not be discriminated against on the basis of nationality, race, colour, sex, language, origin, religion, political or other views, property or social status, or on other grounds. These principles are further described by the Equal Treatment Act §2 and the Basic Schools and Upper Secondary Schools Act §6. See also: https://www.riigiteataja.ee/en/eli/ee/508012015002/consolide/current.
Finland	N/A	
Flemish Comm. (Belgium)	Yes	Achieve optimal learning and development opportunities for all pupils.

Education system	Is there a definition of equity in education?	Definitions of equity in education
France	Yes	The principle of equity in education is defined in Article L 111.1 of the Education Code in its paragraph 5: to guarantee the right to education to everyone, "in respect of equal opportunities, aid is allocated to pupils and students according to their resources and merits. The distribution of the means of the public education service takes into account the differences of situation, notably in economic, territorial and social matters". This is the basis of the priority education policy, which consist of giving more to those who need it most and concentrating resources in the territories where the greatest social difficulties are concentrated. The priority education policy is a targeted policy, which is applied in 1 091 priority education networks (a middle school and its attached schools) identified on the basis of four criteria): rate of scholarship holders, rate of disadvantaged population, rate of late entry into 6th grade and percentage of students residing in priority neighbourhoods of the city policy (QPV) (zoning which itself is built from the poverty rate since 2014).
Greece	Yes	According to the Hellenic Constitution (2019, Art. 16, Par. 4) “All Greek citizens have the right to free education, at all levels in public schools. The State supports both students who excel, and those who need help or special protection, depending on their abilities”. This means that there are no distinctions based on sex and sexual orientation, religion and ethnicity, and also include students with special educational need and/or disabilities. In addition, Greece constantly strives for the successful inclusion of students from migrant backgrounds into its education system aiming for their full registration and attendance.
Iceland	Yes	Equal study opportunities: At compulsory school all pupils are entitled to appropriate education. Pupils should have equal opportunities, regardless of their abilities or circumstances. Therefore, special effort should be made to prevent discrimination on the basis of whether the pupil is of Icelandic or foreign origin. Opportunities are not to depend on whether pupils are boys or girls, where they live, what class they belong to, their sexual orientation, their health, whether they have disabilities, or their circumstances in other respects.
Ireland	Yes	In Ireland, a specific definition on equity in education is not set out in legislation. However, Equity is referred to as a key goal for educational provision, for example in the Department of Education’s most recent Statement of Strategy (2021-2023). The Equal Status Acts (2000-2015) and other equality legislation set out nine grounds for equal treatment and anti-discrimination. The nine grounds are: gender, marital status, family status, sexual orientation, religion, age, disability, race and membership of the Traveller community. These Acts apply to the provision of educational services and set out four areas in which an education institution must not discriminate: 1) the admission of a student, including the terms or conditions of the admission of a student, 2) the access of a student to a course, facility or benefit provided by the school, 3) any other term or condition of participation in the school, and 4) the expulsion of a student or any other sanction.
Italy	Yes	The Constitution of the Italian Republic guarantees school education for all in Article 34, thus fulfilling the mandatory duty of solidarity provided by Article 2 and responding to the fundamental principle of equality and non-discrimination enshrined in Article 3 of the Italian Constitution: "All citizens have equal social dignity and are equal before the law, without distinction of sex, race, language, religion, political opinions, personal and social conditions. It is a task of the Republic to remove the obstacles to economic and social freedom and equality of citizens, hinder the full development of the human person and the effective participation of all workers in the political, economic and social organisation of the Country." Among the rules applying the principle of equality in education provided for in the Constitution are: the Law n. 40 of 6 March 1998; the Legislative Decree n. 286 of 25 July 1998 “Consolidated act of provisions concerning regulations on immigration and rules about the conditions of aliens”; the Law n. 107 of 13 July 2015 – “Good School Reform Act” Comprehensive reform of the school and training system; the Law n. 47 dated 7 April 2017 "Protection measures for Unaccompanied Foreign Minors". Other references and definitions can be found in the Guidelines for the reception and integration of students with a non-Italian citizenship (February 2014) and the Guidelines for educational rights of pupils outside their family (December 2017). Italy has chosen the full integration of everyone in the public education system and intercultural education as its cultural horizon. In order to ensure education rights, migrant pupils (even the undocumented ones) can be enrolled in every period of the year and have the same rights to social and health assistance as Italian pupils.
Japan	Yes	Although it is not the definition of equity in education per se, Article 26 of the Constitution of Japan states that “[a]ll people shall have the right to receive an equal education correspondent to their ability, as provided by law,” and Article 4 (1) of the Basic Act on Education states that “[t]he people must be given equal opportunities to receive an education suited to their abilities, and must not be subjected to discrimination in education on account of race, creed, sex, social status, economic position, or family origin”.
Latvia	Yes	In line with the Education law, everyone has the right to qualitative and inclusive education, and the persons have the right to acquire education regardless of the material and social status, race, nationality, ethnic origin, gender, religious and political affiliation, health condition, occupation, and place of residence.
Mexico	Yes	Equity in education implies that the State guarantees the full exercise of the right to education for all people, based on combating socio-economic, regional, capacity and gender inequalities, supporting students in conditions of social vulnerability and offering everyone a relevant education that ensures their access, progress, permanence and, where appropriate, timely graduation from education services.

Education system	Is there a definition of equity in education?	Definitions of equity in education
Netherlands	Yes	Children with the same talents are entitled to equal opportunities. Every child must be able to fully develop his or her background, parents' level of education, their financial situation or students' special educational needs should not affect a child's school performance. In Article 1 of the Constitution it is stated: All those who are in the Netherlands are treated equally in equal cases. Discrimination on the grounds of religion, belief, political affiliation, race, sex or on any ground whatsoever is not permitted.
New Zealand	N/A	
Northern Ireland (UK)	Yes	Ensuring equality of opportunity in education for all children irrespective of Section 75 Group.
Norway	Yes	All pupils shall be treated equally and no pupil is to be subjected to discrimination. The pupils must also be given equal opportunities, so that they can make independent choices. School must consider the diversity of pupils and facilitate for each pupil to experience belonging in school and society.
Portugal	Yes	Equity is one of the guiding principles of the law on Inclusive Education (DL 54/2018). Equity is the guarantee that all children and pupils have access to the necessary support to realise their learning and development potential.
Scotland (UK)	Yes	Equity in education means that personal or social circumstances are not obstacles to achievement, and that all children and young people are well supported and have the same opportunities to succeed.
Slovak Republic	Yes	The Schools Act n. 245/2008 stipulates: in §3, c): "equal access to education, taking into account the special educational needs of the individual and her/his co-responsibility for her/his education", in §3, e): "prohibition of all forms of discrimination and especially segregation", in §145: "rights provided under this Act shall be guaranteed on equal terms to each applicant, child, pupil and student in accordance with the principle of equal treatment in education defined by a separate law" (which is the Act on Equal Treatment - Anti-discrimination Act, No 365/2004 Coll.).
Slovenia	Yes	"Equity in education, which is an essential element of social justice, is closely associated with equality. Therefore, equity in education is understood often as equality of educational opportunities, which is essential for all citizens in contemporary societies and based on liberal and democratic principles to have an equal opportunity to succeed in life. The notion of equal opportunity presupposes that each individual is treated in accordance with the classic law of justice (equals must be treated the same and non-equals must be treated in accordance with their differences) in situations in which many people compete for limited resources (for example, acceptance into a quality school or university). The conception of social justice as equal opportunity therefore allows inequality in the achievements of individuals, but only if everyone has the same opportunity to attain such achievements, and if the inequality in the achievements of individuals is a consequence of their free choice, ability, invested effort and accepted risk. Due to the fact that an individual possessing equal opportunity in society is strongly dependent on equal opportunities in education, a state that strives for a just society must, with various measures (the implementation of positive discrimination policies for children from socially and culturally underprivileged environments; ensuring everyone the same extent of free education; enabling the individualisation of the school system and instruction that offers every pupil optimal opportunities to acquire a quality education and to take shape as an autonomous individual; the inclusion of children with special needs in cases where such inclusion would be of more benefit to them than schooling in special schools, etc.), first ensure everyone equal educational opportunity. Furthermore, unless there are sound reasons for establishing differences, justice in education always demands the equal, impartial and proportional treatment of pupils in assessment of knowledge, reward, punishment, etc. This means that pupils who demonstrate the same knowledge must gain the same grade, those who infringe the same rules must receive the same punishment, etc." (Ministry of Education and Sport, 2011[144]).
Spain	Yes	The new Education Law (LOMLOE) states that equity is one of the principles on which the Spanish education system is based. The Law provides a precise definition of the extent of equity in education (Article 1. Principles): Equity, which guarantees equal opportunities for the full development of the personality through education, educational inclusion, equal rights and opportunities, also between women and men, which help to overcome any discrimination and universal accessibility to education, and which acts as a compensatory element of personal, cultural, economic and social inequalities, with special attention to those arising from any type of disability, in accordance with the provisions of the Convention on the Rights of Persons with Disabilities, ratified by Spain in 2008. The Law also states that in order to give effect to the principle of equity in the exercise of the right to education, the public administrations will develop actions aimed at persons, groups, social environments and territorial areas that are in a situation of socio-educational and cultural vulnerability, with the aim of eliminating the barriers that limit their access, presence, participation or learning, thereby ensuring reasonable adjustments according to their individual need and promoting the necessary support to promote their maximum educational and social development, so that they can access an inclusive education, on equal terms with others. Likewise, the Law states that compensation policies shall reinforce the action of the education system in such a way that inequalities arising from social, economic, cultural, geographic, ethnic or other factors shall be avoided.

		It is the responsibility of the State and the Regions (Autonomous Communities) to set their priority objectives with a view to achieving more equitable education (Article 8. Principles, from Chapter II Equity and compensation of inequalities in education).
Education system	**Is there a definition of equity in education?**	**Definitions of equity in education**
Sweden	Yes	The Swedish Education Act highlights three aspects of equity: equal access to education, equal quality of education and that education should be compensatory (meaning that the education should take into account students' different needs and strive to offset differences in students' conditions).
Türkiye	Yes	Constitution of Türkiye of 1982, as amended in 2017 Article 10: "Everyone is equal before the law without distinction to language, race, colour, sex, political opinion, philosophical belief, religion and sect, or any such grounds. Men and women have equal rights". Article 42: No one shall be deprived of the right of education. Basic Law on National Education, No. 1739 dated 1973 Article 4: Educational institutions are open to everyone regardless of language, race, gender, disability or religion. In education, no person, family, group or class shall be granted privilege.
United States	Yes	While there is no explicit definition of the phrase “equity in education,” the concept of equality of opportunity, access, and outcomes is embedded throughout various policy documents including the U.S. Department of Education’s mission, which is to “…promote student achievement and preparation for global competitiveness by fostering educational excellence and ensuring equal access.” To fulfil this mission, the Department embeds equity and inclusion throughout its operations and programmes to meet the needs of every learner. The current Administration has established strategic priorities based on feedback from children, educators, parents and families, and their communities toward this end. On 20 January 2021, the President of the United States issued Executive Order 13985, “On Advancing Racial Equity and Support for Underserved Communities Through the Federal Government”. The Executive Order stresses the concept of equal opportunity as the bedrock of American democracy and defines equity for the purposes of the Executive Order as, “the consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that have been denied such treatment, such as Black, Latino, and Indigenous and Native American persons, Asian Americans and Pacific Islanders and other persons of colour; members of religious minorities; lesbian, gay, bisexual, transgender, and queer (LGBTQ+) persons; persons with disabilities; persons who live in rural areas; and persons otherwise adversely affected by persistent poverty or inequality (Section 2: Definitions”). The U.S. Department of Education issued its attendant 2022 Agency Equity Plan on 14 April 2022.

Note: Education jurisdictions were asked to provide an English translation of their definition of equity in education. Such definition(s) can be embedded in legislative framework or can be part of document(s) published by the national (or sub-national) authority. This table is based on answers to the question from the Strength through Diversity Policy Survey “If available, please provide an English translation of the definition of equity in education. Such definition(s) can be embedded in your legislative framework or can be part of document(s) published by a national (or sub-national) authority”. Thirty-four education systems responded to this question.
Source: OECD (2022[92]), Strength through Diversity Policy Survey 2022

Annex Table 1.A.3. Definitions of inclusion

Education system	Is there a definition of inclusion in education?	Definition of inclusion in education
Australia	N/A	
Canada	Yes	In Canada, equity and inclusion in education is described and defined at the provincial and territorial levels to serve regional and local needs and contexts.
Chile	Yes	Taking into consideration that cultural diversity overarches any educational approach, and that school culture is part of the identity framework of each subject, inclusion as an approach becomes an essential element to guide the construction and development of an education where everyone feels included. In this way, the Ministry of Education in implementing inclusive education, has made a conceptual transition from integration to inclusion, opening the concept beyond the importance of considering students with particular conditions of disability or special educational needs. Inclusion is understood to attend to each and every one of the differences that identify the members of an educational community, contemplating the diversity of educability conditions, as stated in the document Inclusive Educational Communities, Keys to Action. This approach is materialised in three guiding principles of inclusive educational actions: Presence (access, welcome and integration); Recognition (visibility, identity and diversities); Relevance (pedagogical practices, learning styles and contexts).

Education system	Is there a definition of inclusion in education?	Definition of inclusion in education
Colombia	Yes	Permanent process that enables, recognises, values and responds appropriately to the diversity of characteristics, interests, possibilities and expectations of children, adolescents, young people and adults. It focuses on promoting the comprehensive development and participation of all people in a learning environment without any discrimination or exclusion, guaranteeing, within the framework of human rights, the support and reasonable adjustments required, reducing the gaps, through practices, policies and cultures that eliminate existing barriers in the educational context.
Czech Republic	Yes	The method of education, which tends to the maximum development of each pupil with regard to their individual needs and specificities.
England (UK)	Yes	The approach over inclusion is summarised in the statutory guidance on the relevant legislation, the Special Educational Needs and Disability (SEND) Code of Practice: "As part of its commitments under articles 7 and 24 of the United Nations Convention of the Rights of Persons with Disabilities, the UK Government is committed to inclusive education of disabled children and young people and the progressive removal of barriers to learning and participation in mainstream education. The Children and Families Act 2014 secures the general presumption in law of mainstream education in relation to decisions about where children and young people with SEN should be educated and the Equality Act 2010 provides protection from discrimination for disabled people".
Estonia	Yes	The Basic Schools and Upper Secondary Schools Act provides for the implementation of inclusive education as the guiding principle for the organisation of education. According to the law, general education of good quality adheres to the principles of inclusive education and is equally available to all persons regardless of their social and economic background, nationality, gender, place of residence or special educational needs. Inclusive education primarily means the basic right of a person to education of good quality. The basic values, principles for organising studies and general objectives of studies of a general education school are the same for all learners, regardless of their special educational needs or whether the studies are conducted in a regular school or in a school created for students who need support. See also: National Education Systems, Estonia/Eurydice, Ch. 12. Educational Support and Guidance: https://eacea.ec.europa.eu/national-policies/eurydice/content/educational-support-and-guidance-20_en.
Finland	N/A	
Flemish Comm. (Belgium)	Yes	Achieve optimal learning and development opportunities for all pupils (this definition underlies many Acts/decrees in education in Flanders and can be considered as the overarching, equitable and inclusive aim of Flemish education). Nevertheless, it is important to note that the concept of inclusion in the context of Flemish education has a more specific usage in that it refers to the leading principle for schools' approach to pupils with SEN. In particular, each school is to provide broad basic care (for all) and increased care for pupils who need it. This broad basic care is the phase in the care continuum in which the school, based on a vision of pupil guidance, stimulates the development of all pupils within the four guidance domains by: Offering a powerful learning environment, Monitoring pupils systematically, Actively working to reduce risk factors, and strengthening protective factors.
France	Yes	The French concept of inclusion does not have the same elements as in other OECD countries. According to Article L111-1 of the Education Code: "Education is the first national priority. The public education service is designed and organised with pupils and students in mind. It contributes to equality of opportunity and to the fight against social and territorial inequalities in school and educational success. It recognises that all children share the capacity to learn and progress. It ensures inclusive schooling for all children, without distinction. It also ensures the social mix of the school population within educational institutions. To guarantee the success of all, the school is built with the participation of parents, regardless of their social origin. It is enriched and strengthened by dialogue and co-operation between all the actors of the educational community.
Greece	Yes	The introduction of a new law on education (4823/2021) in Greece reforms the supportive educational structures with an explicit orientation for inclusion. The 4823/2021 Act is founded on an "educational approach, which takes into account the needs of the heterogeneity of the student population and aims to remove barriers to learning and ensure equal access to the educational system of all students, including students with disabilities and special educational needs" (Law 4823/2021 Article 4).
Iceland	Yes	Inclusive education refers to a compulsory school in pupils' locality or immediate area which meets the educational and social needs of pupils in a mainstream school environment guided by principles of human dignity, democratic values and social justice. The inclusive school assumes that everyone has equal or equivalent study opportunities, and the education is appropriate for each individual. The attitude of the inclusive school is characterised by respect for the rights of all pupils to participate in the learning community of the local school regardless of their attainment or status. This

		basic principle in school operations in Iceland involves universal involvement, access and participation of every pupil in school activities.
Education system	**Is there a definition of inclusion in education?**	**Definition of inclusion in education**
Ireland	Yes	In Ireland, a general overall definition on inclusion in education is not set out. A definition for the inclusion of students with special educational needs is set out in the Education for Persons with Special Educational Needs (EPSEN Act) – 2004: A child with special educational needs shall be educated in an inclusive environment with children who do not have such needs unless the nature or degree of those needs of the child is such that to do so would be inconsistent with — (a) the best interests of the child as determined in accordance with any assessment carried out under this Act, or (b) the effective provision of education for children with whom the child is to be educated. Educational provision around inclusion is governed by the Equal Status Acts (2000-2015), which places certain requirements on schools and educational institutions in relation to how they deliver their services. The Equal Status Acts specify four areas in which an education institution must not discriminate: 1) the admission of a student, including the terms or conditions of the admission of a student; 2) the access of a student to a course, facility or benefit provided by the school; 3) any other term or condition of participation in the school; and 4) the expulsion of a student or any other sanction. The Acts require that schools and educational institutions do not discriminate across the nine grounds in our equality legislation (the nine ground are: gender, marital status, family status, sexual orientation, religion, age, disability, race and membership of the Traveller community). They must reasonably accommodate students with disabilities. Harassment and sexual harassment is prohibited in education institutions.
Italy	Yes	As highlighted in the Legislative Decree n. 66 of 2017, inclusion at school: a) concerns girls and boys, pupils and students, responds to different educational needs and is realised through targeted educational and didactic strategies for the development of the potential of everyone in accordance with the right for self-determination and reasonable accommodation and in the perspective of the best quality of life; b) is realised through cultural and educational projects, the organisation and curriculum of educational institutions, as well as through the definition and sharing projects among schools, families and other public - private subjects, operating in the educational community; c) constitutes fundamental commitment of all the components of the educational community which, within the framework of the specific roles and responsibilities help to ensure the educational success of girls and boys, pupils and students.
Japan	Yes	Although it is not the definition of inclusion in education per se, Article 4 (1) of the Basic Act on Education states that “[t]he people must be given equal opportunities to receive an education suited to their abilities, and must not be subjected to discrimination in education on account of race, creed, sex, social status, economic position, or family origin.” For example, in terms of disabled people, Article 16(1) of the Basic Act for Persons with Disabilities states that “[t]he national government and local public entities must give accommodation to children and students with disabilities being able to receive their education together with children and students without disabilities insofar as possible, so that persons with disabilities are able to receive a full education based on their age and capabilities and in accordance with their particular characteristics, and must take necessary measures to improve and enhance the contents and methods of the education”.
Latvia	Yes	In line with the Education Development Guidelines 2021-2027 “Future Skills for Future Society", inclusive education is a process that ensures that the diverse needs of all learners are met, maximising opportunities for each learner to participate in learning, culture and diverse communities and minimising exclusion from education and learning.
Mexico	Yes	Inclusion: is a transformative process that ensures full participation and access to quality learning opportunities for all children, youth and adults, respects and values diversity, and eliminates all forms of discrimination in and through education. It represents a commitment to make educational institutions and other learning environments such places, where all are valued and feel part of, and where diversity is seen as a richness (Cali Commitment, UNESCO).
Netherlands	N/A	
New Zealand	N/A	
Northern Ireland (UK)	Yes	Inclusion in education would generally be taken to mean the inclusion of all children wherever possible irrespective of the Section 75 Group they represent.
Norway	Yes	Inclusion means that all children and pupils should feel that they belong. They should feel safe and discover that they are valuable and that they are able to help shape their own learning. An inclusive environment welcomes all children and pupils. School shall develop an inclusive environment that promotes health, well-being and learning for all. Schools shall [...] help each pupil to preserve and develop her or his identity in an inclusive and diverse environment. When developing an inclusive

		and inspiring learning environment, diversity must be acknowledged as a resource.
Education system	**Is there a definition of inclusion in education?**	**Definition of inclusion in education**
Portugal	Yes	Inclusion is one of the guiding principles of the law on Inclusive Education (DL 54/2018). Inclusion is the right of all children and pupils to access and participate, fully and effectively, in the same educational contexts. It was adopted the UNESCO definition: a process aimed at responding to the diversity of pupils' needs through increased participation of all in learning and in life of the school community.
Scotland (UK)	Yes	Inclusive education is an approach that recognises and values the diversity of learners and is able to respond flexibly to that diversity in such a way that barriers to participation, learning and achievement are removed, and a high-quality education for all is developed and sustained.
Slovak Republic	Yes	According §2 lett. ai) of national school law n. 245/2008 inclusive education is common education of children, pupils, students or participants in education, carried out on the basis of equal opportunities and respect for their educational needs and individual peculiarities, and supporting their active involvement in educational activities of the school or school facility.
Slovenia	Yes	The principle of inclusion is embedded in the legislative framework and in national guidelines and strategic documents. "Education that follows the often-mentioned generally accepted values and norms of civilisation - human rights and duties, tolerance and respect, which promote mutual assistance and solidarity, care for the environment, which support knowledge and respect for intergenerational differences, etc., and also support the goals of inclusion and integration. (White Paper on Education, 2011). One of the education goals of the Republic of Slovenia (defined by the Organisation and Financing of Education Act, Article 2) is: “provide the optimal development of the individual, irrespective of gender, social background or cultural identity, religion, racial, ethnic or national origin, and regardless of their physical and mental constitution or invalidity". Also, other goals support the principle of inclusion. The 2a Article defines that kindergartens, schools and other institutions for education of SEN children shall, in line with the education goals, guarantee a safe and supportive learning environment wherein physical punishment of children and of any kind of violence against and among children are prohibited, as well as discrimination on the grounds of gender, sexual orientation, social and cultural background, religion, race, ethnic and national origin, physical and mental development is prohibited.
Spain	Yes	Inclusive education is an aspiration for "all, without exception", with the most vulnerable being at the forefront of action plans as they face the greatest barriers. It is understood as the process of helping to overcome barriers that limit the presence, participation and achievement of learners, as well as the process of strengthening the capacity of the education system.
Sweden	Yes	The National Agency for Special Needs Education and Schools defines inclusion as meaning that the education should be organised so that everyone can participate based on their circumstances and succeed in learning.
Türkiye	Yes	Basic Law on National Education, No. 1739 dated 1973 Article 4: Educational institutions are open to everyone regardless of language, race, gender, disability or religion. In education, no one person, family, group or class shall be granted privilege.
United States	Yes	Similar to the previous question, while there is no explicit definition of “inclusion in education,” the concept is implicit within the Department’s mission and throughout guiding policy documents to meet the needs of all students. Inclusion also has particular meaning within the special education context to ensure that special education students can receive support while staying in a general education classroom. The governing legislation for children with disabilities is the Individuals with Disabilities Education Act (IDEA) which requires states to have in effect policies and procedures to demonstrate that the State has established a goal of providing full educational opportunity to all children with disabilities, aged birth through 21, and a detailed timetable for accomplishing that goal.

Note: Education jurisdictions have been asked to provide an English translation of their definition of inclusion in education. Such definition(s) can be embedded in the legislative framework or can be part of document(s) published by the national (or sub-national) authority. This table is based on answers to the question from the Strength through Diversity Policy Survey “If available, please provide an English translation of the definition of inclusion in education. Such definition(s) can be embedded in your legislative framework or can be part of document(s) published by a national (or sub-national) authority”. Thirty-four education systems responded to this question.
Source: OECD (2022[92]), Strength through Diversity Policy Survey 2022.

Notes

[1] The data reported did not include the most recent OECD member countries, Colombia and Costa Rica, which joined in 2020 and 2021 respectively.

[2] Natural population decline is meant to occur due to low birth rates and ageing.

[3] The total fertility rate (TFR) in a specific year is defined as the total number of children that would be born to each woman if she were to live to the end of her child-bearing years and gave birth to children in alignment with the prevailing age-specific fertility rates.

[4] In line with OECD conventions, this report identifies "rural schools" in the PISA data as those in communities with fewer than 3 000 people and "urban schools" as those located in any city with more than 100 000 people, unless otherwise noted (OECD, 2017[145]).

[5] Resilient learners can adapt to various tasks and environments, taking advantage of opportunities to reach their individual potential. Such learners have the capacity and agency to identify and capitalise on opportunities given to them by the system and to create their own. They are also able to move between learning tasks and environments, engaging pro-actively in efforts to enhance them (OECD, 2021[74]).

[6] The data excludes Spain for a lack of available information, and includes Costa Rica (which is not included in the OECD PISA reports published in 2019).

[7] ESCS refers to the PISA index of economic, social and cultural status.

[8] Economic literature is divided into two streams that correlate the returns to education to two different phenomena. On the one hand, human capital theory sustains that earning premiums are associated with productivity increases that occur as people acquire additional qualifications. On the other hand, an important concern is that education may have a value in the labour market not because of any effect on productivity but for 'spurious' reasons. In particular, education may act as a signal of ability or other characteristics that employers value because it contributes to productivity but which they cannot easily observe, which is defined as a signalling effect of education (Riley, 2001[147]; Spence, 1973[146]).

[9] "Visible minority" is an administrative category used in Canada that refers to "persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour" as defined in the Employment Equity Act (Cerna et al., 2021[15]).

2 Governing and designing education systems to promote equity and inclusion

This chapter examines the governance and design of equity and inclusion in education systems. Specifically, it explores how educational goals, curricula, regulatory frameworks, responsibilities and administration, diversity of the educational offering, learning environments, as well as school choice and student selection policies respond to diversity in education and influence on equity and inclusion objectives. The chapter ends by highlighting policy pointers for addressing diversity in education and improving equity and inclusion of diverse groups in the governance and design of education systems.

Introduction

This chapter examines how the governance and design of education systems can impact on equity and inclusion in a context of increasing diversity. More specifically, it explores how educational goals and curricular as well as regulatory frameworks can affect equity and inclusion. Education systems differ in whether and how they pursue goals and in how they formulate targets for promoting equity and inclusion. They are expressed both at a generic level (e.g., overall educational goals) and in more specific ways (e.g., curricula). Policies to promote equity and inclusion in education are developed within regulatory frameworks, both inside and outside the education system. Regulatory frameworks include legislation, government regulations and other legal instruments or agreements at the system level. Countries' regulatory frameworks are underpinned, and should be informed, by the commitments they have made in international treaties, declarations and other legal instruments, which in many instances give rise to binding legal obligations domestically.

The chapter also explores how governance features, such as the allocation of responsibilities for and the administration of education, can impact on equity and inclusion in education. Policies on equity and inclusion are often managed by a number of ministerial bodies, and governmental agencies and stakeholders also have responsibilities at various stages of the policy cycle.

Furthermore, the chapter examines certain design features, such as the diversity of the educational offering, learning environments, as well as school choice and student selection policies that can facilitate or impede the achievement of equity and inclusion objectives. The design and diversity of education offerings are important for effectively responding to the diverse needs of students. Three particularly important ways through which the educational provision can impact on equity and inclusion goals are: the diversity of educational offerings (e.g., range of study pathways), the specialisation of learning environments (e.g., specialised classrooms for students with special education needs and the design of school choice policies).

This chapter is organised in six sections. After this introduction, the second section explores education goals and curricula. The third section examines regulatory frameworks while the fourth section discusses responsibilities for and the administration of equity and inclusion. Education provisions are the topic of the fifth section. The final section provides pointers for policy development.

Education goals and curricula for equity and inclusion

Education systems differ in whether and how they pursue goals and in how they formulate targets for promoting equity and inclusion. These goals are expressed both at a generic level (e.g., overall educational goals) and in more specific ways (e.g., curricula) (OECD, 2013[1]).

Educational goals for equity and inclusion

Clear and widely supported educational goals provide a solid reference point based on which policies can be formed. In many cases, educational goals are formulated as standing objectives of an education system. These can be embedded in international treaties and national legislation (discussed in the following section) as well as policy documents and strategies. Educational goals are generally established with the aim of achieving the alignment of processes and school agents' contributions (OECD, 2013[1]). The overall goals for education systems typically include the personal development of individuals, the acquisition of skills and competencies (e.g., learning over the life course, critical thinking), equality of educational opportunities, and certain values and attitudes identified as priorities by government, such as civic participation and respect for fundamental rights, democracy, diversity, and the environment (Cerna et al., 2021[2]).

Equitable or inclusive education can also be viewed as a goal of an education system in itself. Indeed, several education systems formulated equity or inclusion as goals. In Iceland, for instance, one of the pillars of the Education Policy 2030, the country's ten-year education strategy document, focuses on equal opportunities for all by responding to diversity, student welfare, bridging the urban-rural divide and strengthening early childhood education and care and vocational education and training (OECD, 2021[3]). In Japan, The Third Basic Plan for the Promotion of Education aims to build safety nets for learning so that everyone can be a leader in society through, for instance, reducing the educational cost burden at home in order to achieve equal opportunity in education (Ministry of Education, Culture, Sports, Science and Technology, 2018[4]). In New Zealand, several of the National Education Goals focus on equity (Ministry of Education, 2021[5]). These include attaining educational opportunity for all New Zealanders by identifying and removing barriers to achievement (National Education Goal 2) and increased participation and success of Māori by the advancement of Māori education initiatives (National Education Goal 9). In Portugal, the Government's programme promotes an education policy that focuses on equity and quality and states that schools are responsible for guaranteeing equality of opportunity in access to quality and inclusive education (OECD, 2022[6]).

As can be seen, goals are often framed in general terms to provide the overall vision for the system. The policy-making process that follows should ensure that actions are taken to fulfil the goals. Indeed, it is not uncommon for governments to devise statements about the ultimate goals of their education systems and subsequently establish priorities for education policy for the period in which they are in office (Cerna et al., 2021[2]). While goals generally set out the long-term vision for an education system, priorities can focus much more on individual actions that can fulfil the goals. A small number of clear and measurable priorities that set national expectations in the form of policies, curriculum, standards or accountability mechanisms can guide education systems towards higher performance levels (OECD, 2015[7]). In addition, it is becoming increasingly common for governments to establish education targets as well as indicators to assess progress towards these targets (Cerna et al., 2021[2]). Monitoring and evaluation frameworks are important in ensuring that measures taken in pursuit of educational goals are having the desired impacts.

Several systems set indicators and targets specific to different dimensions of diversity, which are further elaborated in Chapter 6. In Ireland, for instance, the Statement of Strategy 2019-2021 by the Department of Education and Skills set out five strategic goals. In terms of equity and inclusion, the strategic goal 2 aims to "advance the progress of learners at risk of educational disadvantage and learners with special educational needs in order to support them to achieve their potential" (Department of Education, 2020[8]). This overarching goal was translated into annual action plans with more specific actions, sub-actions, indicators and targets (Department of Education, 2021[9]), with progress reports summarising the extent to which the actions and sub-actions were achieved or not (Department of Education, 2022[10]).

In Lithuania, the Agreement on National Education Policy (2021-2030) aims to ensure, among other goals, "that education outcomes depend as little as possible on individual negative social, economic or cultural predicament" (Ministry of Education, Science and Sport, 2022[11]). The Agreement then sets out several priorities with shorter time horizons in pursuit of this goal. These include the establishment of a single quality standard for general education for all children by 2024, and a pilot and eventual full-scale roll-out of inclusive education measures for students with special education needs (SEN) in at least five municipalities and their schools by the end of 2023 (Ministry of Education, Science and Sport, 2022[11]). Finally, the Agreement sets out several indicators and targets to monitor the progress. In the United States, to advance racial equity and support for underserved communities, the equity action plan aims to support America's education system through the COVID-19 pandemic, support learners with disabilities and advancing equity in contracting and procurement, among other goals (U.S. Department of Education, n.d.[12]).

In 2022, equity and/or inclusion were identified as priorities in most education systems.[1] The Strength through Diversity Policy Survey 2022 revealed that all responding education systems identified equity and/or inclusion as priorities, albeit with variation as to how they defined the two concepts (see Chapter 1).

In 16 jurisdictions, equity and inclusion were identified as priorities without a distinction between the two concepts. In 16 jurisdictions, equity and inclusion were priorities and the concepts were differentiated. Finally, in Lithuania, only inclusion was identified as a priority (equity was not defined as a concept).

Educational goals and priorities, along with indicators and targets, are also established at the international level. Goal 4 of the Sustainable Development Goals (SDGs), for instance, is to ensure inclusive and equitable quality education and promote lifelong learning opportunities for all. This goal is then broken down into ten targets, such as ensuring free, equitable and quality primary and secondary education for all girls and boys by 2030. Finally, several indicators measure the progress (Box 2.1).

Box 2.1. Educational goals at global and European Union levels

Educational goals also exist at the global and regional levels. The following examples focus on the Sustainable Development Goals and European Union (EU) targets in relation to equity and inclusion in education.

Goals at the global level (SDGs)

Educational targets at the global level include those set out in the SDGs. In particular Goal 4 on Quality Education includes several targets relating to diversity, equity and education (United Nations, n.d.[13]). These goals focus particularly on gender, disability and cultural diversity.

- By 2030, ensure that **all girls and boys** complete free, **equitable** and quality primary and secondary education leading to relevant and Goal-4 effective learning outcomes.
- By 2030, ensure that **all girls and boys** have access to quality early childhood development, care and pre-primary education so that they are ready for primary education.
- By 2030, ensure **equal access for all women and men** to affordable and quality technical, vocational and tertiary education, including university.
- By 2030, **eliminate gender disparities in education** and ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, Indigenous peoples and children in vulnerable situations.
- By 2030, ensure that all learners acquire the knowledge and skills needed to promote sustainable development, including, among others, through education for sustainable development and sustainable lifestyles, human rights, **gender equality**, promotion of a culture of peace and non-violence, global citizenship and appreciation of **cultural diversity** and of culture's contribution to sustainable development.
- Build and upgrade education facilities that are child, **disability and gender sensitive** and provide safe, nonviolent, **inclusive** and effective **learning environments** for all.

Goals at the European Union level

Educational goals and targets pertaining to equity and inclusion in education also exist at the regional level, for example in the EU. The EU has targets in education and training that focus on reducing gaps between groups, ensuring that all students can achieve at their best, and that they remain in education. Such targets, which are designed to foster equity and inclusion, include the following (European Commission, 2021[14]):

- The share of low-achieving 15-year-olds in reading, mathematics and science should be less than 15%, by 2030.
- The share of low-achieving eight-graders in computer and information literacy should be less than 15%, by 2030.

- At least 96% of children between three years old and the starting age for compulsory primary education should participate in early childhood education and care, by 2030.
- The share of early leavers from education and training should be less than 9%, by 2030.
- The share of 25-34-year-olds with tertiary educational attainment should be at least 45%, by 2030.
- The share of recent graduates from vocational education and training (VET) benefiting from exposure to work-based learning during their vocational education and training should be at least 60%, by 2025.
- At least 47% of adults aged 25-64 should have participated in learning during the last 12 months, by 2025.

Source: European Commission (2021[14]), Overview on EU-level targets in education and training, https://op.europa.eu/webpub/eac/education-and-training-monitor-2021/en/chapters/leaflet.html (accessed 8 July 2022); United Nations (n.d.[13]), https://www.un.org/sustainabledevelopment/education/ (accessed 8 July 2022).

According to Cerna et al. (2021[2]), educational priorities are generally reflected in policies and targets pertaining to:

- educational outcomes (e.g., completion rates, performance levels, quality of outcomes) and equity of outcomes (e.g., outcomes for particular student groups),
- education processes (e.g., implementation of a reform; accountability and transparency; school leadership; quality of teaching),
- education staff (e.g., raising the status of teaching, working conditions), and specific areas of priority (e.g., expansion of vocational education, strengthening of early childhood education).

Curriculum for equity and inclusion

Curriculum is the central means for enacting the principles of inclusion and equity within an education system (UNESCO, 2017[15]). Curriculum reflects what is meant to be taught (content) and learned (goals). It needs to be coherent with how it is to be taught (pedagogical methods) and learned (tasks), as well as with the materials to support learning (e.g., textbooks, computers) and the methods to assess learning (e.g., examinations, projects) (UNESCO, 2020[16]).

Curriculum matters for equity and inclusion in education. Research on the learning outcomes of disadvantaged groups finds that curriculum can be effectively designed to respond to the unique needs of diverse learners (Darling-Hammond et al., 2019[17]). Hence countries are increasingly designing curricula that enable equity in education, adopting a whole-child and person-development approach through learning and assessment practices that support all learners to thrive. While some countries focus on equality, i.e., offering equal opportunities to all learners (e.g., minimum curriculum standards or a core curriculum), others take an equity-focused approach, providing differential support for learners based on their individual needs (e.g., remedial learning for learners with difficulties). Some others embrace diversity and embed inclusion as the principle of curriculum design and implementation (e.g., recognising the cultural identity of individual learners) (OECD, 2021[18]; OECD, 2022[19]).

An equity-centred approach to curriculum development

While equality in curriculum development means offering the same opportunities to all, this does not mean that everyone will benefit from the same curriculum to the same extent since there are other factors that may influence students' learning experiences and outcomes, such as socio-economic background and gender, among others (OECD, 2021[18]).

In contrast, an equity-centred approach can be defined as one that provides all students with opportunities to develop the knowledge and skills that allow them to participate in further education and society, without lowering expectations due to their personal and social backgrounds (Voogt, Nieveen and Thijs, 2018[20]; Cerna et al., 2021[2]; OECD, 2021[18]). The starting point in an equity approach to curriculum development is acknowledging that certain individual and contextual differences among learners, such as their socio-economic status, are related with disparities in student performance (OECD, 2013[21]), and recognising how different students may encounter unfair limitations or barriers in education as a result of their background or personal characteristics (OECD, 2021[18]). Personal and social characteristics and circumstances, such as gender, socio-economic status or ethnic origin, should not be, or result in, obstacles to students' success (ibid.). An equitable curriculum provides all students with a school experience that enables them to have the opportunity to succeed in life, regardless of their personal and social backgrounds (Muller and Young, 2019[22]). An equity approach to curriculum development therefore means recognising that adaptations may be required to ensure that diverse learners are offered the necessary opportunities to learn[2] so that all students have the ability to acquire the knowledge and skills to participate in society (OECD, 2020[23]; OECD, 2021[18]). These may include, for instance, extra-curricular remedial learning for those falling behind, to ensure that such students are able to develop the targeted knowledge and skills, mother-tongue tuition for immigrant students, or specific support to ensure the engagement of gifted students (see Chapter 5). An equity-centred approach to curriculum can also mean implementing specific measures to ensure changes in circumstances or contextual events do not have the effect of compounding existing patterns of disadvantage. For example, in response to the COVID-19 pandemic, several education systems implemented targeted measures to reach out to learners who may have faced particular barriers in remote learning (OECD, 2020[24]). Box 2.2 describes some curriculum adaptations to promote equity.

Box 2.2. Curriculum adaptations to promote equity

A recent international curriculum analysis by the OECD Future of Education and Skills project revealed the types of curriculum adaptations countries/jurisdictions have in place to achieve greater equity. Most countries/jurisdictions (92% of those surveyed) reported providing for curriculum adaptations to support students with SEN (OECD, 2021[18]). In Australia, for example, education providers have the ability to adjust and tailor the curriculum to ensure it is appropriate and accessible for students with disabilities, among other measures to enable students' full participation (Australian Government, 2022[25]).

With respect to cultural and linguistic diversity, 77% of participating countries/jurisdictions reported that they provide special curriculum provision for language learners, non-native speakers and/or immigrants. Furthermore, 56% reported that curriculum provision considers the specific needs of Indigenous or minority students. Some countries/jurisdictions design a needs-based language curriculum specifically for immigrant students, to give them access to instruction in their mother language or to training in the language of instruction of the host country (OECD, 2021[18]). In Finland, for example, students from multilingual families (foreign background) are offered optional lessons in their family's language, with the city of Helsinki offering optional lessons in 40 different languages in 2015 (ibid.).

Curriculum adaptations are also implemented to address individual differences in students' educational experiences or abilities. Well over one-third of countries/jurisdictions include provisions for gifted or talented students (46%) (OECD, 2021[18]). Some countries/jurisdictions reported addressing socio-economic disadvantage (27%) and/or geographic disadvantage (19%) through the curriculum (ibid.). In addition, 38% of participating countries/jurisdictions in the OECD address early school leavers or potential dropouts.

Table 2.1. Groups receiving special provisions within the curriculum, by country/jurisdiction

	Special education needs	Language learners/non-native speakers/ immigrants	Indigenous or minority	Gifted/talented	Socio-economically disadvantaged	Early school leavers or potential dropouts	Geographically disadvantaged
Australia	x	x	x	x			
British Columbia (Canada)	x	x	x				
Chile	x	x	x	x		x	
Costa Rica	x						
Czech Republic	x				x		
Denmark	x	x					
Estonia	x	x				x	
Finland	x	x	x		x		
Hungary	x			x		x	
Ireland	x	x		x	x		
Japan	x	x	x	x	x	x	x
Korea	x	x	x	x			x
Mexico	x	x	x	x		x	
Netherlands	x	x	x	x			
New Zealand	x	x	x	x		x	x
Northern Ireland (UK)[1]							
Norway	x	x	x				
Ontario (Canada)	x	x	x	x	x		x
Poland	x	x					
Portugal	x	x	x	x	x	x	x
Quebec (Canada)	x	x	x			x	
Scotland (UK)	x						
Sweden	x	x	x				
Türkiye	x	x				x	
United States[1,2]	x	x	x	x	x	x	
Wales (UK)							

Note: Based on available data from 26 OECD countries/jurisdictions. Countries with missing or not applicable values in all categories of the table were not included in the analysis. They were included if data was available for at least one of the categories in the table and could be clearly coded as "yes" or "no".
1. Responses for these countries/jurisdictions were submitted by independent researchers, not government officials.
2. Provisions may vary from state to state.
Source: Data from Edu2030 PQC, item 0.6, OECD (2021[18]). Adapting Curriculum to Bridge Equity Gaps: Towards an Inclusive Curriculum, https://doi.org/10.1787/6b49e118-en.

Inclusion in curriculum development

Inclusion in curriculum development can be defined as offering all learners a high-quality curriculum that allows them to reach their full potential by taking into account and respecting their diverse characteristics, needs, abilities and expectations, and by removing structural and cultural barriers to participation, including biases, unstated school norms, values and beliefs and discrimination (OECD, 2021[18]). Unlike the equity-centred approach to curriculum development, an inclusive curriculum does not assume the same

standards for all learners, but respects and values their unique needs, talents, aspirations and expectations. It strives to ensure that all students are part of the shared learning experiences of the classroom (IBE, 2019[26]) and to create learning environments where broader societal and education goals of inclusion are celebrated (Power et al., 2018[27]; Apple, 2019[28]; Snyder, 1971[29]; OECD, 2021[18]). While the equity-centred approach may inadvertently lead to the stigmatisation of certain learners (e.g., students in remedial classes may be regarded as weak learners), an inclusive curriculum aims at instilling in learners a positive sense of self-esteem and self-worth as well as a sense of belonging in school and society (Cerna et al., 2021[2]). An inclusive curriculum thus explicitly supports not only the learning but also the well-being of all learners, while promoting broader societal goals of tolerance, respect and inclusion (OECD, 2021[18]).

Developing an inclusive curriculum may involve broadening the definition of learning used by teachers and education policy makers, beyond its narrow conception as the mere acquisition of knowledge presented by a teacher to one that actively involves students and enables them to take the lead in making sense of their experiences (UNESCO, 2017[15]). This broader conception of learning frames the role of teachers as guiding students and facilitating their engagement and learning, rather than instruction (ibid.).

To develop inclusive curricula, policy makers may draw on design principles, such as flexibility, student choice, engagement, teacher agency and student agency (OECD, 2021[18]). Guiding principles for the design and implementation of flexible curriculum goals can be found in the Universal Design for Learning, a research-based framework created specifically to support education professionals in the design of inclusive curricula and learning environments (ibid.). Discussed in more detail in Chapter 5, Universal Design for Learning aims to dismantle barriers to participation and learning for all learners by centring learner variability within curriculum development (Rose and Meyer, 2002[30]; Waitoller and King Thorius, 2016[31]).

An inclusive curriculum is one in which diverse students can see themselves – and their backgrounds, values, cultures and linguistic traditions - reflected. This can be key in shaping individuals' sense of self and belonging within society. Incorporating Indigenous languages, worldviews and cultures into the curriculum has, for instance, been identified as being crucial to promote the well-being of Indigenous students (OECD, 2017[32]). An OECD Review of Indigenous Education in Canada highlighted the need to give visibility to Indigenous cultures in schools and classroom as well as the value of adopting Indigenous cultural practices and including Indigenous histories and cultures in the curriculum. The review also stressed the importance of using curriculum resources developed by and reflecting Indigenous peoples and the benefit of providing learning opportunities in Indigenous languages (ibid.).

An inclusive curriculum also allows students to see themselves represented as successful in different subjects and career pathways (McKendree et al., 2002[33]). A curriculum that highlights the capabilities and successes of persons with diverse sexual orientations and gender identities or expressions can, for instance, help to develop positive attitudes and greater acceptance among students, as well as helping to promote LGBTQI+ students' sense of self (McBrien, Rutigliano and Sticca, 2022[34]).

Inclusive curricula also promote values such as tolerance and solidarity and a respect for and appreciation of diversity in society. This may be achieved through targeted programmes, such as citizenship education. Citizenship education is broadly understood to refer to "a subject area which aims to promote harmonious co-existence and foster the mutually beneficial development of individuals and the community in which they live. In democratic societies, citizenship education supports students in becoming active, informed and responsible citizens, who are willing and able to take responsibility for themselves and for their communities" (European Commission/EACEA/Eurydice, 2018[35]). It may also equip students to "learn to learn together" and acquire the skills to communicate with people from different cultures (Cerna et al., 2019[36]). In increasingly diverse societies, facing new challenges, such as those associated with the emergence of social media, promoting citizenship education may be increasingly important for fostering inclusion, cohesion and sustainability within and between our societies. Citizenship education has received increased attention by education researchers and policy makers in response to the perceived failures of

education systems to address the complexities of globalisation and contribute to advancing human rights, freedom, democracy and global justice (OECD, 2022[6]).

Portugal is one example of an education system that has made citizenship education a mandatory component of its curriculum, in line with its 2017 National Strategy for Citizenship Education. The "Citizenship and Development" subject includes a variety of topics (such as human rights, gender equality, interculturality and environmental education), with mandatory and optional courses at all levels of education (OECD, 2022[6]). The French Community of Belgium also made the subject "Education to philosophy and citizenship" a mandatory part of the curriculum for upper-secondary schools in the State school network in 2017 (Briga, 2018[37]).

In addition to dedicated subjects, values related to inclusion can be promoted as cross-curricular themes. In Austria, for example, the Teaching Principle on Reflexive Gender Education and Equality aims to increase gender-responsiveness and eliminate bias at all levels of education through encouraging the inclusion of a gender perspective in all subjects of the curriculum in an interdisciplinary (Austrian Federal Ministry of Education, Science and Research, 2022[38]). Intercultural competence is also included as a cross-curricular theme in some education systems - though, as discussed in Chapter 5, it is important to note that intercultural education has been recognised as a concept that needs to be embedded into the learning environment as a whole, rather than merely representing a simple "add-on" to the curriculum (UNESCO, 2006[39]). In Germany, for instance, there are policies in place in all Länder to promote aspects of intercultural learning as a transversal competence within the curriculum (Briga, 2018[37]). Similarly, in France, intercultural competence is a cross-cutting element of the different domains of the *Socle commun de connaissances, de compétences et de culture* (Common basis of knowledge, competences and culture) that sets out the knowledge and competences that need to be acquired by students during the period of compulsory education (ibid.).

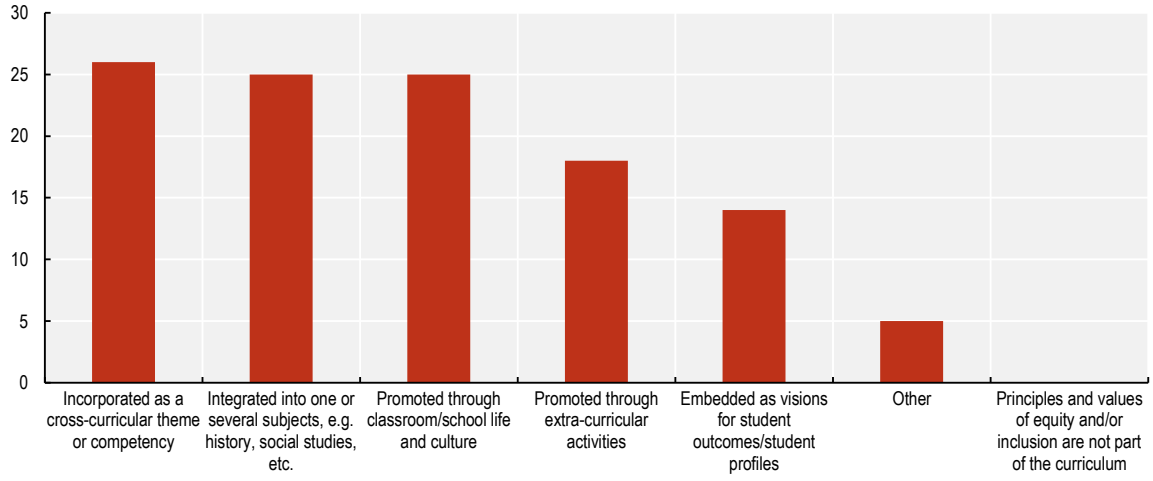
In Greece, mainstream schools can implement education programmes to strengthen knowledge and awareness of human rights, diversity, respect, dignity and inclusion to support the mainstreaming of students with SEN among students without SEN (European Agency for Special Needs and Inclusive Education, 2018[40]).

Principles of equity and inclusion in the curriculum

The Strength through Diversity Policy Survey (2022) showed that 26 education systems in the OECD both incorporate the principles and values of equity and/or inclusion as cross-curricular themes or competences and integrate them in one or more subjects (see Figure 2.1). Twenty-five education systems also promote these equity and inclusion principles through classroom, school life and culture, and 18 education systems promote these principles through extra-curricular activities. However, only 14 education systems (Australia, the Flemish Community of Belgium, Canada, Finland, Greece, Ireland, Italy, Lithuania, New Zealand, Portugal, Sweden, Northern Ireland (United Kingdom), Scotland (United Kingdom) and the United States) embed the principles of equity and inclusion as part of their vision for student outcomes and/or student profiles.

Figure 2.1. Curriculum strategies (2022)

Number of education systems that use the following curriculum strategies to encourage the principles and values of equity and/or inclusion (ISCED 2)



Note: This figure is based on answers to the question "Which curriculum strategies are used in your education jurisdiction to encourage the principles and values of equity and/or inclusion at ISCED 2 level?". Thirty-two education systems responded to this question. Response options were not mutually exclusive.
Options selected have been ranked in descending order of the number of education systems.
Source: OECD (2022[41]), Strength through Diversity Policy Survey 2022

StatLink https://stat.link/8isvxn

Even if not explicitly incorporated as part of the curriculum, principles and values related to equity and inclusion can also be implicitly built into the curriculum or be included elsewhere in education policy (OECD, 2021[18]).

Despite growing attention to issues of inclusion, however, many education systems are still lacking comprehensive curriculum policy frameworks that take into account the needs of students embodying one or more of the dimensions of diversity addressed in the Project. For example, in Europe, 23 out of 49 countries curricula do not explicitly include discussion of sexual orientation and gender identity (UNESCO, 2020[42]). In a report on inclusive education, the International Lesbian, Gay, Bisexual, Transgender, Queer and Intersex Youth and Student Organisation (IGLYO) (2018[43]) noted that, among the European countries surveyed, only 19 have discussion of LGBTQI+ issues embedded in or as a compulsory part of the curriculum. Among these are 14 OECD countries: Austria, Belgium, the Czech Republic, Denmark, Finland, France, Germany (certain Länder), Iceland, the Netherlands, Norway, the Slovak Republic, Spain (certain regions), Sweden and the United Kingdom (McBrien, Rutigliano and Sticca, 2022[44]).

Many countries also do not have curricula that inclusively address the needs of ethnic minority and Indigenous communities. In Europe, for example, curricula seldom make any reference to Roma culture and history (Rutigliano, 2020[45]). Furthermore, only 23 countries have ratified the 1989 ILO Indigenous and Tribal Peoples Convention, which "affirmed the relevance of curriculum, the importance of being taught in the mother-tongue and the need for 'history textbooks and other educational materials [to] provide a fair, accurate and informative portrayal of the societies and cultures of these peoples' (Article 31)" (Tanyu et al., 2020[46]).

Curricular autonomy and flexibility can help tailor the learning experience to the students' needs

Curriculum flexibility refers to the ability of schools and teachers to make local decisions about the curriculum (see more in Chapter 5). It allows schools and teachers a determined amount of freedom to make site-specific curricular choices on learning content and goals, pedagogy, assessment, and time and place of learning, and thus provides opportunities to tailor learning to the local context and/or students' learning needs (OECD, 2021[18]). The OECD discusses curriculum flexibility within the context of curriculum autonomy, which is where responsibility is delegated to local entities to make decisions about the curriculum, based on the context and profile of the student body (ibid.).

Research on curriculum autonomy and flexibility is limited, and the available evidence on the advantages and disadvantages of various forms of flexibility is mixed (OECD, 2021[18]). Curriculum flexibility and autonomy have been argued as beneficial in the sense that they create space for innovation (through broadening the scope of innovation possibilities beyond those permitted by a prescriptive curriculum) and allow schools to develop local solutions for local problems in ways that are responsive to students' particular needs (Sinnema, 2016[47]). However, offering flexibility in terms of curriculum content has been recognised as having the potential to inadvertently have negative impacts on students' performance and perpetuate or increase existing gaps between students (based on, for instance, their socio-economic background or geographical location), thus raising concerns from an equity perspective (OECD, 2021[18]; Sinnema, 2016[47]). This may occur, for instance, as a result of regional and local variations in how curriculum flexibility is used as well as variations in investments in teaching and capacity-building (OECD, 2021[18]; Sinnema, 2016[47]). In addition, while some have argued that curriculum flexibility can give teachers a stronger sense of professional identity and satisfaction, others have emphasised the increased expectations and workload implications arising from decision-making regarding the curriculum (Sinnema, 2016[47]).

While results from PISA 2015 show a positive association between school autonomy, particularly with regard to the curriculum, and students' science scores, no correlation between autonomy and student achievement was found after accounting for the socio-economic profile of the students. In fact, steering of the curriculum at the national level was found to result in more equitable science scores. However, this finding may be explained by the fact that, across OECD countries, socio-economically disadvantaged schools and rural schools are granted less autonomy than advantaged schools and urban schools (Voogt et al., 2018[48]).

Overall, what seems to matter is *how* curriculum flexibility is used. Where positive effects have been found, this has tended to be in combination with adaptive instruction and enriched activities that give students targeted opportunities to develop their potential (OECD, 2021[18]). Researchers have also noted that school-based decision-making regarding the curriculum also requires capacity-building for teachers as well as the development of a school environment that supports teachers as curriculum-makers (Voogt et al., 2018[48]).

To mitigate the risks associated with curriculum flexibility, some countries try to reserve flexible curriculum for specific groups of students, such as linguistic minorities and low-achieving students. Other countries encourage schools to be flexible and proactive to support students from disadvantaged backgrounds, for instance through the use of Individual Education Plans (IEPs). For example, in Scotland (United Kingdom), the Curriculum for Excellence provides an inclusive, flexible framework that can be used to meet local needs and offer a personalised approach for all learners, which allows them to progress at different rates and in different ways to reach their full potential (Strength through Diversity Policy Survey 2022). The Curriculum for Excellence seeks to allow professional autonomy and responsibility in both the planning and delivery of the curriculum, supported by a clear vision at the system level (OECD, 2021[49]). Portugal has also adopted different measures regarding curricular flexibility and autonomy, which are described in detail in Box 2.3.

Box 2.3. Curriculum in Portugal

The Ministry of Education of Portugal has developed a framework for the design and implementation of a 21st century curriculum. This framework comprises three central guiding documents, which have changed the national curriculum for primary and secondary education:

1. The Students' Profile by the End of Compulsory Schooling (*Perfil dos Alunos à Saída da Escolaridade Obrigatória*, Legislative Order No. 6478/20172017), which is a reference guide for the whole curriculum, setting out the principles, vision and academic, social and emotional competences that students should have attained by the time they complete compulsory schooling;
2. The 2017 National Strategy for Citizenship Education (*Estratégia Nacional da Educação para a Cidadania*, ENEC3), which was created to support children and young people in acquiring citizenship skills, knowledge and values throughout compulsory education. It includes the Citizenship and Development subject, which promotes and reflects on the principles of diversity, equity and inclusion and encourages interdisciplinary activities;
3. The Essential Learning, which are curricular orientation documents that describe the bases for the planning, realisation and assessment of each school subject for each year of schooling to Vocational Courses and Artistic Specialised Courses (Legislative Orders No. 7414/2020 and No. 7415/2020).

In Portugal, schools and teachers have been given greater responsibility for making decisions about curricula and pedagogy, in order to deepen, strengthen and enrich the Essential Learning by subject and year of schooling.

Decree Law No. 55/2018 provides schools with up to 25% of curriculum autonomy in order to meet their specific needs. In practice, this means that schools have the flexibility to tailor pedagogical practices, promote interdisciplinary learning and project-based methodologies, and create new subjects. It also gives schools the flexibility to allow upper-secondary students to adjust their programme design to their needs and interests, by allowing them to replace subjects within the scientific component of each course, among other measures.

Source: OECD (2022[6]), Review of Inclusive Education in Portugal, https://dx.doi.org/10.1787/a9c95902-en.

Curriculum adaptations can help meet individual learning needs

Curriculum adaptations can be applied to respond to individual learning needs across education systems. These adaptations are often associated with, and informed by, Individual Education Plans (see Chapter 5). Adaptations are broad categories of adjustments to meet the individual learning needs of students and foster their inclusion. Accommodations and modifications are two aspects of adaptations. These two categories differ as accommodations concern *how* students learn, while modifications concern *what* students learn (Understood, 2019[50]).[3] Accommodations are intended to help students learn the same information as other students, through changes to the structures and the environment that provide support. By contrast, modifications can involve a structural change in the student's curriculum, which may result in them learning different material, being assessed using a different standard that used for other students, or being excused from particular projects (Morin, 2019[51]).

Adaptations can be made for different student groups, including students with SEN, gifted students and immigrant students. For example, accommodations and modifications are commonly used to support students with SEN, including for instance students with Attention Deficit Hyperactivity Disorder (ADHD)

(see Mezzanotte (2020[52]) and Chapter 5). In Estonia, for instance, every child the legal right to attend a school in their residential area or study in a mainstream school with an adapted curriculum and receive different kinds of support (UNESCO Global Education Monitoring Report, 2021[53]). In Spain, adaptations or modifications can be made within the established curriculum to enable students with SEN to achieve the objectives and master the content as generally laid out for all students. These adaptations may take two different forms: curriculum access adaptations (changes related to spatial resources, the introduction of new materials and use of additional communication systems) and curricular adaptations, such as changes in objectives, contents, methodology, activities and assessment criteria and procedures, which are carried out within the classroom planning (European Agency for Special Needs and Inclusive Education, 2020[54]).

Adaptations are often also offered to students with an immigrant background, mostly in terms of training in language of instruction or instruction in their mother tongue. For example, to promote the inclusion of students with an immigrant background who have recently arrived in the Portuguese educational system, the Ministry of Education in Portugal has implemented measures to support the acquisition of the Portuguese language. These students are offered the school subject Portuguese as a second language (PL2 or *Português Língua Não Materna*, PLNM), in both primary and secondary education (ISCED 1, 2 and 3) (OECD, 2022[6]).

Students with SEN, gifted students, and immigrant/refugee students are not the only groups that can receive specific curricular provisions. Table 2.1 above maps provisions within the curriculum across several OECD countries. In the case of education for gifted students, education systems usually apply two different adaptation measures: acceleration and enrichment (Rutigliano and Quarshie, 2021[55]). While acceleration is a "vertical" extension of the curriculum, involving the early introduction of content or a quickening of the pace of delivery and response, enrichment is a "horizontal" extension of the curriculum, involving the extension of learning activities to provide additional depth and breadth in accordance with the child's abilities and needs (Hensley, 2013[56]).

Acceleration strategies are defined as "an educational intervention based on the mastery of higher grade-level knowledge than typical grade-level content or speeding up the pace of the material presented". Typically, acceleration might include grade-skipping, early entrance to kindergarten, school or college, or subject-specific acceleration in order to provide advanced instruction more likely to respond to the student's ability or potential (Steenbergen-Hu, Makel and Olszewski-Kubilius, 2016[57]). The benefits of academic acceleration are nonetheless subject of debate, and there is a growing resistance to this practice from both teachers and parents (Rutigliano and Quarshie, 2021[55]).

In Austria, acceleration is a strategy codified by the law. Since 1974, the School Education Act has enabled gifted and talented students to skip grades, or, since 2006, to skip school levels with the condition that a minimum of nine years of schooling must be completed (Weilguny et al., 2013[58]). The 2017 Basic Decree on the Promotion of Giftedness and Talented People further specifies acceleration measures for gifted and talented students. In 2021, national implementations for a "new upper-level scheme" were being introduced to academic secondary schools, secondary technical and vocational schools and colleges for higher vocational education that would increase the intensity of the learning/studying process and would provide an improved overview of individual learning deficits. One of the key elements of this reform was the development of a package for gifted students to be able to complete curriculum areas before their peers (Rutigliano and Quarshie, 2021[55]).

In Finland, gifted students are not labelled as such at the school level, but acceleration in the form of grade-skipping, ungraded systems and subject matter acceleration are permissible where they are identified as benefiting the particular needs of students (Tirri and Kuusisto, 2013[59]; Laine and Tirri, 2016[60]).

In comparison with acceleration, "enrichment provides richer and more varied [curricular] content through modification and supplementation of content in addition to standard content in the regular classroom" (Kim,

2016, p. 103[61]). Enrichment strategies include differentiated instruction within the classroom, extra-curricular activities and summer camps, as well as intensive courses at university (Rutigliano and Quarshie, 2021[55]). Enrichment of the curriculum in and out of the classroom tends to have a positive impact on gifted students' outcomes. This is the case especially when combined with targeted or individualised instruction. For example, in Israel, the Department for Gifted and Outstanding Students has implemented a programme for excellence starting from Grade 1. Gifted children, defined as those who rank in the top 3% of their class and who have passed qualifying tests, participate in enrichment programmes, ranging from full-time special schools to extra-curricular courses (UNESCO Global Education Monitoring Report, 2021[62]).

Some countries such as New Zealand combine enrichment and acceleration strategies in education for gifted students. A report that traced changes in New Zealand's education provision to gifted students over 10 years showed an increasing preference for a combination of enrichment and acceleration approaches as opposed to either one being used individually (Riley and Bicknell, 2013[63]).

Regulatory frameworks for equity and inclusion

Policies to promote equity and inclusion in education are developed within regulatory frameworks, both inside and outside the education system (Cerna et al., 2021[2]). Regulatory frameworks include legislation, government regulations and other legal instruments or agreements at the system level (OECD, 2019[64]). Countries' regulatory frameworks are underpinned, and should be informed, by the commitments they have made in international treaties, declarations and other legal instruments, which in many instances give rise to binding legal obligations domestically.

International treaties, declarations and statements

Most OECD countries are parties to several international treaties and declarations that contain provisions relating to equity and inclusion in education, which provide an underlying framework for the development of educational law and policy at the system level.

The right to education for everyone is guaranteed in article 13 of the International Covenant on Economic, Social and Cultural Rights (ICESCR), which has been signed or ratified by all OECD countries (UN General Assembly, 1966[65]). The content of the right to education and the resulting state obligations are unpacked and explained by the UN Committee on Economic, Social and Cultural Rights in its General Comment No. 13 (United Nations Committee on Economic, Social and Cultural Rights, 1999[66]). The General Comment sets out four essential and interrelated elements of the right to education, as follows (United Nations Committee on Economic, Social and Cultural Rights, 1999[66]):

1. Availability: Functioning educational institutions and programmes need to be available in sufficient quantity within the jurisdiction of the state party.
2. Accessibility: Educational institutions and programmes need to be accessible to all, without discrimination. This involves ensuring that there is no discrimination in access to education (in both law and fact), that education is within safe physical reach (either by attendance at a reasonably convenient geographic location or through technology), and that education is economically accessible to all (with free primary education being available to all and free secondary and tertiary education being required to be progressively introduced).
3. Acceptability: Education needs to be acceptable to all learners, in both form and substance (including curricula and teaching methods). This includes ensuring that education is relevant, culturally appropriate and "of good quality" for all learners.
4. Adaptability: Education is required to be flexible so that it "can adapt to the needs of changing societies and communities and responds to the needs of students within their diverse social and

cultural settings" (United Nations Committee on Economic, Social and Cultural Rights, 1999, p. 3[66]).

The UN Declaration on the Elimination of All Forms of Racial Discrimination requires countries to guarantee the right to everyone to equality in the enjoyment of the right to education without distinction as to race, colour, or national or ethnic origin (UN General Assembly, 1965[67]). Article 10 of the UN Convention on the Elimination of All Forms of Discrimination Against Women also requires countries to take all appropriate measures to eliminate discrimination against women in the field of education (UN General Assembly, 1979[68]). Among other measures, this involves taking steps both to eliminate stereotypes regarding the roles of men and women, both in and through education (including, in particular, through any necessary adaptations to teaching methods and revisions to textbooks and school programmes) (UN General Assembly, 1979[68]).

The right to education is restated in the UN Convention on the Rights of the Child (CRC) (UN OHCHR, 1989[69]), and is reaffirmed in relation to persons with disabilities in the UN Convention on the Rights of Persons with Disabilities (CRPD), which specifies that education must be inclusive, with the provision of "effective individualised support mechanisms…provided in environments that maximise academic and social development, with the goal of full inclusion" (UN General Assembly, 2006[70]). In line with this, the CRPD states that countries shall take "appropriate measures to employ teachers, including teachers with disabilities, who are qualified in sign language and/or Braille" and to provide training for educational staff in "the use of appropriate augmentative and alternative modes, means and formats of communication, educational techniques and materials to support persons with disabilities" (UN General Assembly, 2006[70]). In 2016, the UN Committee explained and unpacked further the normative of the right as it applies to persons with disabilities in *General Comment No, 4 on the right to inclusive education*. Paragraph 9 of the General Comment provides an overview of what the right to inclusive education involves in terms of international human rights law (UN Committee on the Rights of Persons with Disabilities, 2016[71]):

> *Ensuring the right to inclusive education entails a transformation in culture, policy and practice in all formal and informal educational environments to accommodate the differing requirements and identities of individual students, together with a commitment to removing the barriers that impede that possibility. It involves strengthening the capacity of the education system to reach out to all learners. It focuses on the full and effective participation, accessibility, attendance and achievement of all students, especially those who, for different reasons, are excluded or at risk of being marginalized. Inclusion involves access to and progress in high-quality formal and informal education without discrimination. Inclusion seeks to enable communities, systems and structures to combat discrimination, including harmful stereotypes, recognise diversity, promote participation and overcome barriers to learning and participation for all by focusing on the well-being and success of students with disabilities. It requires an in-depth transformation of education systems in legislation, policy and the mechanisms for financing, administering, designing, delivering and monitoring education.*

The right to education is also reaffirmed in the UN Declaration on the Rights of Indigenous Peoples (UNDRIP), which, while not legally binding, has been endorsed by the majority of countries (Saul, Kinley and Mowbray, 2016[72]). The UNDRIP sets out existing human rights standards as they apply to Indigenous peoples and "establishes a universal framework of minimum standards for [their] survival, dignity, well-being and rights" (UN General Assembly, 2022[73]). Article 14(1) states that Indigenous peoples have the right to all levels of education without discrimination and article 15(1) also specifies that the diversity and dignity of Indigenous peoples' cultures, traditions, histories and aspirations" are to be appropriately reflected in education (article 15(1)). Indigenous peoples also have the right to establish and control their educational systems and institutions providing education in their own languages and in a manner appropriate to their cultural methods of teaching and learning, and should, where possible, have access to an education in their own culture and in their own language (United Nations General Assembly, 2007[74]). The UNDRIP is complemented by the International Labour Organisation's Indigenous and Tribal Peoples Convention 1989. Article 27 of the Convention provides that education programmes and services are to be developed in co-operation with Indigenous peoples "to address their special needs, and shall incorporate their histories, their knowledge and technologies, their value systems and their further social,

economic and cultural aspirations." Article 27 further states that governments shall recognise the right of Indigenous peoples "to establish their own educational institutions and facilities, provided that such institutions meet minimum standards established by the competent authority in consultation with these peoples" and that "appropriate resources shall be provided for this purpose" (International Labour Organization, 2017[75]).

Objectives for education are specified at the international level in the ICESCR, the CRC and the CRPD. These include the full development of the human personality, talents and mental and physical abilities to their fullest potential; respect for human rights; respect for the child's cultural identity, language and values; and enabling all persons to participate effectively in a free society (UN General Assembly, 2006[70]; UN General Assembly, 1966[65]; UN OHCHR, 1989[69]).

Further detail regarding the legal standards implied by the above provisions (along with other relevant international and regional legal standards)[4] and guidance regarding their implementation in practice is provided in the Abidjan Principles, which serve as a reference guide on the right to education as it is guaranteed in international human rights law (see Box 2.4).

Box 2.4. Guidance on the right to education in practice: the Abidjan Principles

Developed by a committee of experts, the Abidjan Principles unpack the provisions in international human rights law pertaining to education and provide guidance on their implementation in practice. The Principles, which were adopted in 2019 following a three-year participatory consultation and drafting process, have been recognised as an authoritative interpretative text by international and regional bodies such as the UN Human Rights Council, the European Committee of Social Rights and the Inter-American Commission on Human Rights. Several of the principles explicitly concern equity and inclusion in education, some of which are summarised below:

- Principle 17 sets out some of the key elements of states' obligation to realise the right to education. These include "the elimination of discrimination and the guarantee of equality in education, including by guaranteeing reasonable accommodation to ensure that no persons, including individuals with disabilities, are excluded from education."
- Principle 20 lists the principles that are to be applied in the delivery and governance of education. These include inclusivity, equality and non-discrimination, and participation.
- Principle 23 concerns the need to ensure the realisation of the right to equality in the enjoyment of the right to education, which involves, among other aspects, addressing socio-economic disadvantages; combatting stigma, stereotyping, prejudice, and violence; and recognising the dignity of all persons and the intersectionality of different grounds of discrimination.
- Principles 24, 25 and 26 set out obligations in relation to the right to equality and non-discrimination in enjoyment of the right to education. Principle 24 specifies that the obligation to eliminate all forms of discrimination in the enjoyment of the right to education includes direct and indirect discrimination, denial of reasonable accommodation, and intersectional discrimination. Principle 25 sets out the requirement for states to (a) ensure that laws, policies or practices do not directly or indirectly discriminate in education and (b) address any situation breaching the rights to equality and non-discrimination in relation to the right to education. This includes the need to address "systemic disparities of educational opportunity or outcomes for some groups in society" and "segregation in the education system that is discriminatory on any prohibited ground, in particular socio-economic disadvantage". Principle 26 sets out some of the measures to be taken by states in fulfilment of their obligation to prevent discrimination and ensure equality in the enjoyment of the right to education. These include

measures to ensure education systems are organised in a way that prevents discrimination and ensures equality.

- Principle 28 concerns the need to ensure reasonable accommodation in education for individuals' different capabilities relating to one of more of the prohibited grounds of discrimination, including with regard to the curriculum, the learning environment, in-class communication, pedagogical materials, and assessment.
- Principle 31 concerns the human rights law requirement for education to be "inclusive", which means accommodating "the cultural, linguistic, and other unique traits of society" and enabling "learners to develop their personality and cultural identity and to learn and understand cultural values and practices of the communities to which they belong, as well as those of other communities and societies."
- Principle 32 addresses stakeholder participation in educational governance and specifies the requirement for education to be "accountable, participatory, inclusive and transparent."

Source: The Abidjan Principles (n.d.[76]), Abidjan Principles on the Right to Education, https://www.abidjanprinciples.org/ (accessed 13 December 2022).

All OECD countries are also signatories to the (non-binding) Salamanca Statement on Principles, Policy and Practice in Special Needs Education and Framework for Action, which were adopted in 1994 at a conference on the policy changes needed to promote inclusive education to enable schools to serve all children, particularly those with SEN (UNESCO, 1994[77]). The Salamanca Statement and Framework endorse and are informed by the principle of inclusive education – that education systems and schools should serve all learners, taking into account and responding to the wide diversity of their characteristics and needs (UNESCO, 1994[77]). The Salamanca Statement asserts that (UNESCO, 1994, p. iv[77]):

> *Regular schools with [an] inclusive orientation are the most effective means of combatting discriminatory attitudes, creating welcoming communities, building an inclusive society and achieving education for all; moreover, they provide an effective education to the majority of children and improve the efficiency and ultimately the cost effectiveness of the entire education system.*

National frameworks relating to equity and inclusion in education

National constitutions

Education law and policy at the system level is also framed and underpinned by the relevant country's national constitution and/or overarching legislation relating to human rights, equality and non-discrimination.

The constitutions of many OECD countries contain general provisions recognising or guaranteeing equality to all citizens (or, more broadly, all persons) before the law and/or prohibiting discrimination (McCrudden and Prechal, 2009[78]). Prohibitions against discrimination can either be framed generally, or in relation to specific characteristics, such as race, sex, or disability. The constitution of Belgium, for instance, both provides that Belgians are equal before the law (article 10) and specifies that enjoyment of the rights and freedoms for Belgians must be provided without discrimination (article 11) (Legal Affairs and Parliamentary Documentation Department of the Belgian House of Representatives, 2021[79]). Article 11(1) of the constitution of Korea states that "[a]ll citizens shall be equal before the law and there shall be no discrimination in political, economic, social or cultural life on account of sex, religion, or social status" (Korean Legislation Research Institute; Korea Law Translation Centre, n.d.[80]). Similarly, article 15(1) of Canada's Constitution Act 1982 provides that "every individual is equal before and under the law and has

the right to the equal protection and equal benefit of the law without discrimination based on race, national or ethnic origin, colour, religion, sex, age or mental or physical disability" (Government of Canada, 2022[81]).

While the United Kingdom and New Zealand do not have a formal written constitution, they both have enacted legislation related to equality and non-discrimination. In the United Kingdom, the Equality Act 2010 prohibits discrimination on the basis of one or a combination of specified protected characteristics (age, disability, gender reassignment, marital or civil partnership status, race, religion or belief, sex, sexual orientation) in a number of contexts, including employment, education, housing (United Kingdom Government, 2022[82]; United Kingdom Government, n.d.[83]). The Equality Act 2010 also provides for a "public sector duty regarding socio-economic inequalities", which requires Ministers and national and local authorities to "have due regard to the desirability" of exercising their functions in a way "that is designed to reduce the inequalities of outcome which result from socio-economic disadvantage" (United Kingdom Government, 2022[82]). In New Zealand, individuals are protected from discrimination on specified prohibited grounds in areas of public life (including employment and education) by the Bill of Rights Act 1990 and the Human Rights Act 1993 (New Zealand Human Rights Commission, 2022[84]).

A number of constitutions also contain explicit provisions relating to education. A right to education appears in approximately three-quarters of the world's constitutions (Jung, Hirsch and Rosevear, 2014[85]), with approximately 70% requiring the country in question to provide at least a certain level of education to all free of charge (Constitute, 2022[86]). 59% of constitutions have been found to guarantee equal access to primary education, with 58% prohibiting discrimination in access on the basis of socio-economic status (Cassola, Raub and Heymann, 2016[87]). Mexico's national constitution, for instance, specifies that all people have the right to education and that education provided by the state shall be free of charge and develop all human abilities. Chapter III of Japan's constitution, which sets out the "rights and duties of the people" also states that "all people shall have the right to receive an equal education correspondent to their ability" (Prime Minister of Japan and His Cabinet, 1946[88]). A right to education is also guaranteed in article 73(1) of the Constitution of the Portuguese Republic, with article 73(2) providing that (Portuguese Parliament, 2005, p. 35[89]):

> *The State shall promote the democratisation of education and other necessary conditions, for education, realised through the school and other educational means, to contribute to equal opportunities, the overcoming of economic, social and cultural inequalities, the development of personality and a spirit of tolerance, mutual understanding, solidarity and responsibility, for social progress and democratic participation in collective life.*

Regulatory frameworks relating to equity and inclusion in education at the system level

Legislation and/or other regulatory measures are a key step in ensuring that international legal commitments can be translated into policy and practice at the system level (UN Committee on Economic, Social and Cultural Rights, 1990[90]). Many education systems have adopted legislation and/or other regulatory measures related to equity and inclusion in education, which vary in terms of the extent to which they relate to promoting the learning and well-being of all students, or are rather targeted to address specific groups who are at risk of exclusion in education, most commonly students with disabilities or SEN (UNESCO, 2020[16]). UNESCO's Global Education Monitoring Report analysis shows that laws relating to education, whether general in nature or focused on inclusion in education, tend to target specific groups, and primarily students with disabilities (ibid.). Among the countries examined, 79% were found to have education laws concerning specifically people with disabilities, 60% had education laws relating to linguistic minorities, 50% had education laws promoting gender equality and 49% had education laws relating to ethnic minorities and Indigenous peoples (ibid.). With respect to laws specifically relating to inclusion in education, 11 countries were found to have laws exclusively concerning people with disabilities (ibid.).

Legislative measures addressing specific dimensions of diversity

Legislative measures relating to students with disabilities or SEN may include official definitions and classifications of needs and conditions, criteria for the provision of additional support, and requirements for inclusion within mainstream school settings (Brussino, 2020[91]). In Austria, for example, the Compulsory Schooling Act 1985 stipulates that a student will be regarded as having SEN when, as a result of a physical or mental disability, they cannot follow teaching in a regular class without additional support measures (Brussino, 2020[91]; Eurydice, 2022[92]). Low school performance or language difficulties is not sufficient to establish SEN, as a causal connection with an identified physical or mental disability is required, and an application has to be submitted to the board of education for a declaration of SEN (Brussino, 2020[91]; Eurydice, 2022[92]). In Australia, the Disability Standards for Education 2005 aim to ensure that students with disabilities are able to access and participate in education on the same basis as students without disabilities, and clarify the obligations of education and training providers in this regard (Australian Government, 2022[25]). The Standards include provisions relating to the process for determining and making adjustments to assist students with disabilities, enrolment in education institutions, and access to support services (ibid.). Similarly, Colombia's 2017 Decree 1421 stipulates that students with disabilities should be educated within the same institutions as their peers and provides for "Individual Plans for Reasonable Adjustments" to tailor teaching and learning to students' needs and learning styles (UNESCO Global Education Monitoring Report, 2021[93]; UNESCO, 2020[16]).

Legislation or regulatory policies specifically relating to the education of national minorities and/or Indigenous students may provide for a right to minority or Indigenous language instruction, specify measures to ensure minority or Indigenous language and culture is reflected in the curriculum, and/or establish mechanisms to ensure the participation of communities in education. Lithuania's Law on Education, for example, specifies that municipalities in areas where a national minority has traditionally constituted a substantial part of the population shall guarantee teaching in the national minority language or the learning of the national minority language, if the minority requests it (Article 28(7)). The Law on Education further specifies that general education and non-formal education schools shall create opportunities for learners belonging to national minorities to learn their native language, history and culture (Article 30(2)) (Parliament of the Republic of Lithuania, 2015[94]). Sweden's Compulsory School Ordinance gives Sami students the right to be taught in their native language if the native language of one or both of their parents is not Swedish (though a municipality is only required to arrange Sami mother-tongue teaching if a suitable teacher is available). Legislation also provides that Sami children are entitled to attend a Sami school for the first six years of education, where teaching is required to be in both the Sami and Swedish languages (Swedish Equality Ombudsman, 2008[95]). In Norway, the Sami Act provides that the Sami and Norwegian languages are languages of equal worth and may be used in official contexts. The Kindergarten Act also states that early childhood education and care institutions are to take into account children's cultural background in their daily operations, including the language and culture of Sami children (UNESCO, 2019[96]).

In Canada, the education ministries of the province of British Columbia have also entered into official agreements (Memoranda of Understanding) to work together with Indigenous communities and school districts to promote the educational outcomes of Indigenous students (UNESCO, 2019[96]). In British Columbia, the Memorandum of Understanding led to a framework for the creation of Education Enhancement Agreements, which establish collaborative partnerships between Indigenous communities and school districts (with shared decision making and specific goal setting) to meet the educational needs of Indigenous students (Government of British Columbia, n.d.[97]).

In New Zealand, the Education and Training Act 2020, which aims to provide all learners with "high-quality, culturally responsive, seamless and inclusive education", contains specific provisions relating to equity and inclusion for Indigenous (Māori) learners. Section 127 of the Act, for instance, provides that school boards are required to take all reasonable steps to make instruction available in the Māori language, achieve

equitable outcomes for Māori students, and work "to ensure their plans, policies and local curriculum reflect local *tikanga Māori* (Māori customs, practices and conventions), *mātauranga Māori* (Māori knowledge and wisdom) and *te ao Māori* (the Māori world view)" (New Zealand Ministry of Education, 2021[98]).

Legislation promoting inclusive education generally

While regulatory frameworks relating to equity and inclusion in education still tend to be focused on specific groups, examples of frameworks addressing the need to support all learners can be found in several OECD education systems. In Chile, for instance, the 2015 School Inclusion Law stipulates that "it is the duty of the State to ensure inclusive quality education for all" and that the education system shall encourage educational establishments to be a meeting place for students from different genders, nationalities and socio-economic, cultural and/or ethnic backgrounds. The Law also specifies that the admission processes of educational institutions that receive subsidies or contributions from the state are to be carried out in accordance with the principles of transparency, inclusive education, universal accessibility, equity and non-discrimination (UNESCO Global Education Monitoring Report, 2020[99]).

In Portugal, a new regulatory framework for inclusive education was established in 2018 following an evaluation of the previous decade's policies and practices and a broad national consultation (OECD, 2022[6]). The adoption of the 2018 law for inclusive education reflected a shift away from the narrow conceptualisation of inclusion in education as ensuring the participation of students with SEN in mainstream schools and from the idea that a formal special needs diagnosis or categorisation is required for the provision of specific support. The law aims to end segregation and discrimination based on diagnoses and clinical labels by removing categorisation systems for students and the restricted concept of "support measures for students with special education needs". Rather than focusing on specific "groups" of students, it promotes a broader approach, in which every student has the right to receive adapted measures to support their learning and inclusion and to specific resources that might be mobilised to meet their educational needs in all education and training offerings.

In some instances, general frameworks for inclusion in education have evolved out of legislation or policy measures concerning the inclusion of students with SEN in mainstream education. In Italy, for example, the 1977 law providing for the inclusion of students with disabilities within mainstream schools has been followed by other laws and directives extending the principle of inclusion in education to other learners. These include the Ministerial Directive of 27 December 2012, which requires schools to put in place measures to support students with particular learning needs arising from "assessed disabilities, specific developmental disorders or socio-economic, linguistic and cultural disadvantages." The 2015 Good School Reform Act seeks to promote the education of all learners by taking into account their particular learning styles, with the broader aim of counteracting inequalities and preventing school dropouts (European Agency for Special Needs and Inclusive Education, 2021[100]).

Similarly, New Brunswick, Canada has promoted the concept of inclusive education through legislation and policy since 1986, when the enactment of Bill 85 by the legislature established a requirement for all students to be included within the public education system and that students with disabilities and other SEN be educated in mainstream classes (AuCoin, Porter and Baker-Korotkov, 2020[101]). An official definition of inclusive education was developed by the local government in 2009, which introduced the concept of a common learning environment and clarified that, rather than just being of concern in relation to students with SEN, inclusion involves accommodating the diverse needs of all learners (ibid.). Building on these developments, a comprehensive policy on inclusive education - Policy 322 - was adopted by the Department of Education and Early Childhood Development in 2013 to strengthen inclusion in public education. Policy 322 establishes a series of legally binding requirements with the objective of ensuring that public schools are inclusive (New Brunswick Department of Education and Early Childhood Development, 2013[102]). These include requirements for school practice, such as ensuring a common learning environment where student-centred learning principles are applied and where appropriate

accommodations for students' needs are considered and implemented in a timely manner, and the development of personalised learning plans in certain circumstances. Policy 322 also specifies that the Department of Education and Early Childhood Development and school districts "must establish and maintain systemic supports for public education that make inclusion of all students a practical reality", as well as setting out requirements for both teaching staff and school leaders (New Brunswick Department of Education and Early Childhood Development, 2013[102]). The policy is legally binding and has been used a model by other education systems, both in Canada and other regions of the world, to promote inclusive education for all students (AuCoin, Porter and Baker-Korotkov, 2020[101]).

Addressing the needs of and supporting all learners to achieve their educational potential is also central to the legal and policy framework for education in Scotland (United Kingdom). In Scotland, the Education (Additional Support for Learning (Scotland) Act 2004 (EASL Act)) sets out the legal framework for identifying and responding to the additional support needs of students who are facing barriers to learning, with the aim of ensuring that all learners are provided with the necessary support towards achieving their full potential (Scottish Government, 2017[103]). Introducing the term "additional support needs" as a replacement for the term "special education needs", the EASL Act signalled a shift in focus away from a narrow definition of SEN to addressing the needs of all learners (Barrett et al., 2015[104]). It also promotes collaboration among the different actors who support students, as well as setting out the rights of children, young people and parents within the education system (Scottish Government, 2017[103]). Statutory guidance accompanying the EASL Act outlines the range of factors that may give rise to additional support needs among learners, including learning environment, social and emotional factors, health and disability and family circumstances (Education Scotland, n.d.[105]). The EASL Act was amended by the Education (Scotland) Act 2016, which provides for certain rights for specific learners in relation to any support needs they may have in order to achieve their educational potential at school. The 2016 Act also establishes responsibilities on the part of Scottish Ministers and local authorities "to have regard to the need to reduce inequalities of outcomes arising out of socio-economic disadvantage when exercising their functions relating to school education" (Scottish Government, 2017[103]). These legislative developments formed the background to the development of the National Framework for Inclusion, which is designed to support teachers in implementing inclusive pedagogy in practice (Barrett et al., 2015[104]). The Framework is based on the understanding of inclusion as a process to increase participation in education and on the belief that, through quality teaching, the capacity of all students to learn can improve (ibid.).

Intersectionality of diversity in education

As discussed in Chapter 1, the term "intersectionality" was initially coined by the Black feminist legal scholar Kimberlé Crenshaw (1989[106]), to raise awareness of how gender and ethnicity combine to create challenges, especially for Black women. Drawing upon three legal cases in the United States, she argued that by viewing Black women as purely Black or as purely female ignores other challenges specific to the intersection of these two characteristics. The concept has since inspired extensive discussion and has been applied in many other academic fields such as psychology, sociology, and medical and life sciences, with many researchers calling for explicit recognition of intersectionality in, for instance, health research (Bauer et al., 2021[107]). An intersectionality approach is in contrast to more traditional siloed equality work that has tended to focus on one marginalised group at a time (Christoffersen, 2021[108]).

Intersectionality does not refer solely to the characteristics of the individual, but also to broader macro environments. For instance, while individual discrimination experiences exist, they are often symptoms of macro-level systems of power, such as sexism and racism (Hill Collins and Bilge, 2016[109]). Dimensions of diversity thus do not only characterise individuals, but also the social context in which they reside (Varsik and Gorochovskij, Forthcoming[110]).

In education, there are many examples where an intersectional approach has revealed previously unrecognised disparities in outcomes. For instance, while it has been observed that socio-economically disadvantaged students or students from certain ethnic backgrounds achieve lower academic results, an intersectional analysis between ethnicity and socio-economic status revealed that, among socio-economically disadvantaged students, almost all ethnic minority groups achieved significantly better results than the cultural majority group (in this case White British students), while only one ethnic minority group outperformed the cultural majority group among non-socio-economically disadvantaged students (Strand, 2014[111]).

An intersectionality framework highlights that different aspects of individuals' identities are not independent of one another. Instead, they interact to create unique identities and experiences, which cannot be understood by analysing each dimension separately or in isolation from their social and historical contexts (Bowleg, 2012[112]).

Frameworks can help policy makers to systematically assess interventions and processes for their effectiveness in mitigating intersectional issues. Applying intersectional methodologies in an analysis can help evaluate policies according to their impact on groups who are otherwise marginalised by focusing on the individuals' intersecting identities. Drawing on the review by Hankivsky and Cormier (2011[113]) and work by Hankivsky (2012[114]), a selection of three policy frameworks that operationalise intersectionality is summarised briefly in Box 2.5 (for more information, see (Varsik and Gorochovskij, Forthcoming[110])).

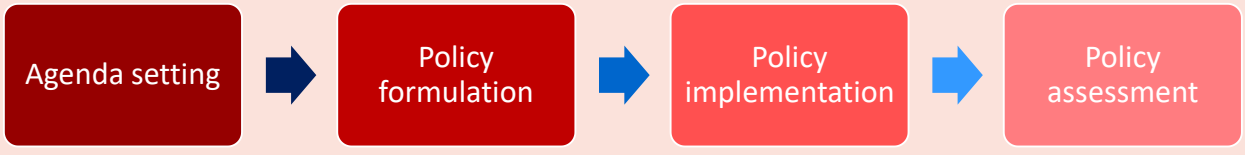
Box 2.5. Selected policy frameworks on intersectionality

Intersectional policy analysis

A possible method for analysing policies from an intersectional perspective is to examine each step of the policy-making process to determine the need for an intersectional perspective (Bishwakarma, Hunt and Zajicek, 2007[115]; Hankivsky and Cormier, 2011[113]). If the need is identified, the intersectional policy process analysis can determine whether it is appropriately included in each step (Hankivsky and Cormier, 2011[113]).

While going through this process, representatives from each intersectional group at which the policy is targeted should be proportionally included in the policy discussion. This can help ensure a thorough examination of the process from a diversity of perspectives. In order to achieve this Bishwakarma, Hunt and Zajicek (2007[115]) developed a guide consisting of four stages: agenda setting, policy formulation, policy implementation and policy assessment (see Figure 2.2).

Figure 2.2. Intersectional policy analysis



Source: Illustration by Varsik and Gorochovskij (Forthcoming[110]) based on Bishwakarma, Hunt and Zajicek (2007[115]), Intersectionality and informed policy and Hankivsky and Cormier (2011[113]), Intersectionality and Public Policy: Some Lessons from Existing Models, https://doi.org/10.1177/1065912910376385.

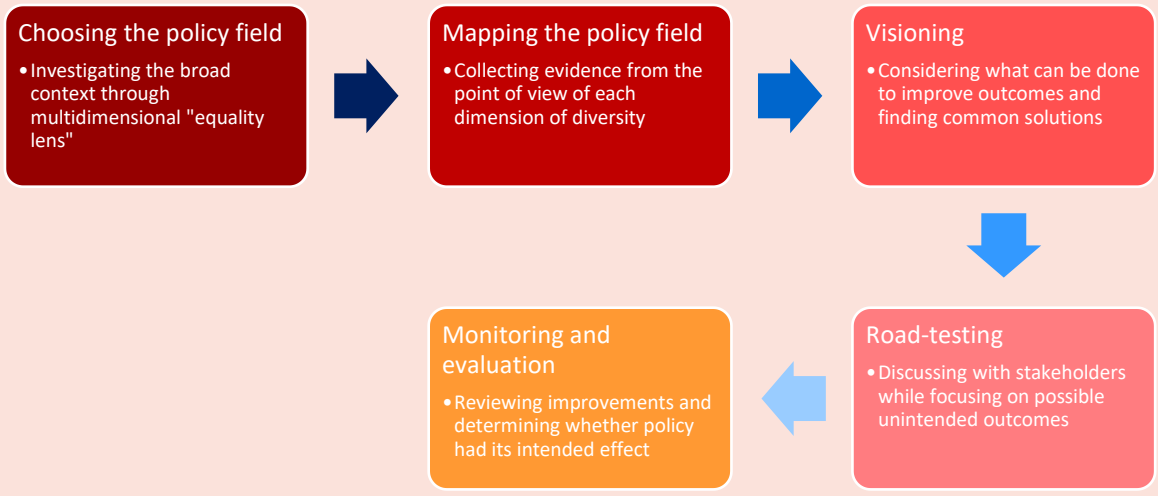
Multi-strand approach

An alternative way to integrate an intersectional perspective in policy making is to employ the multi-strand approach. This methodology was initially developed to promote equality and human rights in Wales (United Kingdom) by Alison Parken (2010[116]). It is based on the principle that each "strand" (or dimension) of diversity should be represented in policy making without prioritising one over the others. It thus aims to avoid thinking in silos, and prefers to consider differences in outcomes between different dimensions.

Furthermore, it seeks to combine expertise from a range of perspectives, such as equality and human rights, and to incorporate representatives from diverse groups into the policy discussion without letting any specific dimension or intersection dominate the conversation (Hankivsky and Cormier, 2011[113]).

This method differs from the intersectional policy process analysis by not focusing on the evaluation of a single policy (new or existing) (Hankivsky and Cormier, 2011[113]). Instead, the multi-strand approach emphasises the examination of the entire policy field. The analysis focuses on how different dimensions of diversity are affected by policy and whether any changes can serve to address the existing disparities. After mapping the policy field and envisioning possible changes, proposals are "road-tested" by imagining how they would impact individuals at different intersections of diversity to examine intended and unintended consequences (Parken, 2010[116]). Lastly, the methodology emphasises continuous monitoring of outcomes. The framework can be summarised in five steps illustrated in Figure 2.3.

Figure 2.3. Multi-strand approach



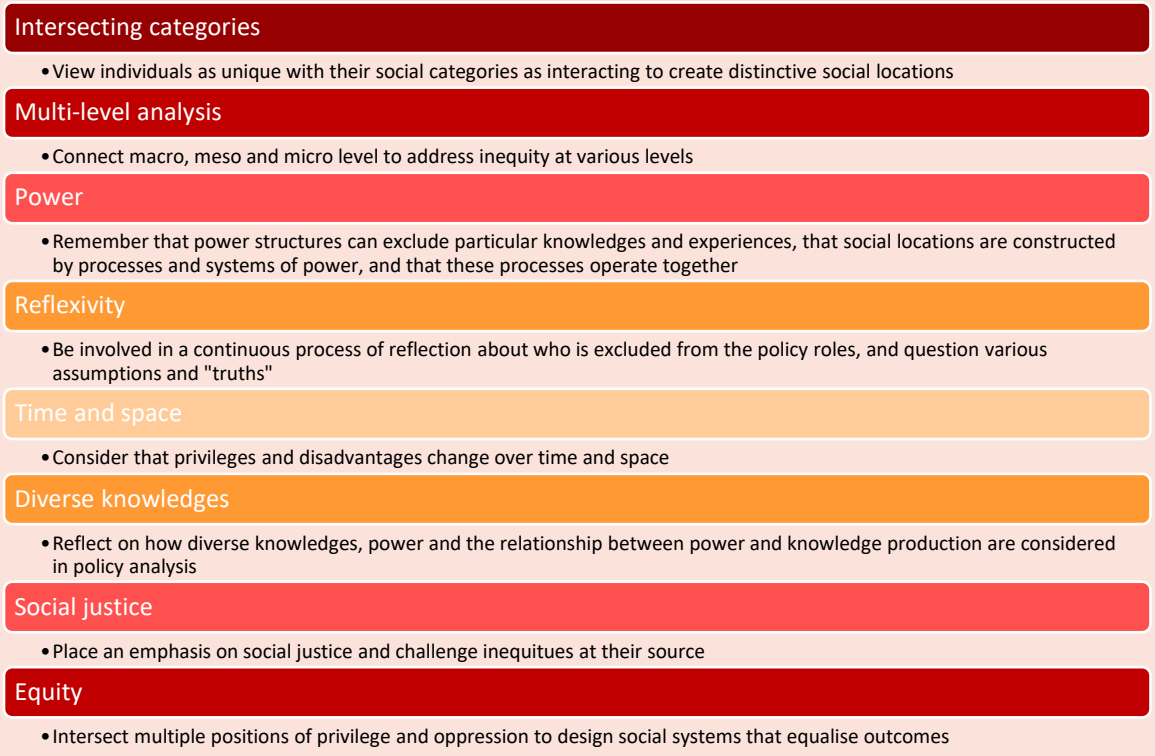
Source: Illustration by Varsik and Gorochovskij (Forthcoming[110]) based on Hankivsky and Cormier (2011[113]), Intersectionality and Public Policy: Some Lessons from Existing Models, https://doi.org/10.1177/1065912910376385 and Parken (2010[116]), A multi-strand approach to promoting equalities and human rights in policy making, http://dx.doi.org/10.1332/030557309X445690.

Intersectionality-based policy analysis framework

The Intersectionality-Based Policy Analysis (IBPA) Framework published by the Institute for Intersectionality Research and Policy aims to provide user-friendly methods for policy makers to translate intersectionality into practical approaches (Hankivsky, 2012[114]). The IBPA Framework is a joint outcome of a number of authors who engaged in a participative process, during which they received feedback from scholars in the field in 2011-12. The IBPA Framework primarily targets stakeholders in health and health-related policy sectors, but it can potentially guide policy makers in the education area as well. The IBPA Framework has two components. The first component comprises eight guiding principles that advance the

central tenets of intersectionality. These are summarised in Figure 2.4. The second component comprises 12 sets of questions that can guide or shape an intersectional analysis.

Figure 2.4. Intersectionality-based policy analysis framework



Source: Illustration by Varsik and Gorochovskij (Forthcoming[110]) based on Hankivsky (2012[114]), An Intersectionality-Based Policy Analysis Framework, https://data2.unhcr.org/en/documents/download/46176 (accessed 19 January 2023).

The Strength through Diversity Policy Survey 2022 revealed that most OECD education systems did not have policies in place at lower secondary level to overcome the challenges associated with embodying more than one dimensions of diversity associated with disadvantage. Of the systems (Colombia, Mexico, Northern Ireland (United Kingdom)) that did report having such policies, the most common intersections considered were the dimensions of immigrant background and SEN.

Nine education systems reported that they had policies targeting students both with an immigrant background and SEN, and eleven systems reported having policies targeting students with an immigrant background who were also socio-economically disadvantaged (Table 2.2). Four education systems also targeted students with an immigrant background in rural areas/disadvantaged geographical areas. Three systems targeted female/male students with an immigrant background.

In addition, four education systems had policies targeting students from ethnic groups or national minorities with SEN. Six systems had policies in place targeting the intersection of gifted students with SEN (though this may be a result of the fact that in some systems, gifted students are considered a sub-category of SEN). Northern Ireland (United Kingdom) and Ireland also had policies in place that targeted Indigenous students (Travellers) with SEN and Indigenous students from a disadvantaged socio-economic background. Northern Ireland (United Kingdom) and Korea also reported having policies in place targeting students in rural areas/disadvantaged geographical areas with SEN. Finally, Portugal had in place policies

targeting female students from ethnic groups or national minorities. In Scotland (United Kingdom), as mentioned, additional support for students is based on each individual's needs. There are therefore no policies targeting specific groups of students.

Table 2.2. Education systems with policies targeting intersections of student groups

Intersection	Education systems
Students with an immigrant background and special education needs	Colombia, Flemish Comm. (Belgium), French Comm. (Belgium), Greece, Iceland, Ireland, Italy, Sweden, Türkiye
Female students with an immigrant background	Flemish Comm. (Belgium), Korea, Türkiye
Male students with an immigrant background	Flemish Comm. (Belgium), Korea, Türkiye
Students from ethnic groups or national minorities with special education needs	Colombia, Ireland, Slovak Republic, Sweden
Male students from ethnic groups or national minorities	
Female students from ethnic groups or national minorities	Portugal
Students with special education needs and gifted students	Greece, Ireland, Italy, Korea, Slovak Republic, Türkiye
Male LGBTQI+ students	
Female LGBTQI+ students	
LGBTQI+ students with special education needs	Ireland
LGBTQI+ students with an immigrant background	
Students with an immigrant background from a disadvantaged socio-economic background	Denmark, Flemish Comm. (Belgium), French Comm. (Belgium), Greece, Iceland, Ireland, Italy, Netherlands, Northern Ireland (UK), Sweden, Türkiye
Students with an immigrant background in rural areas/disadvantaged geographical areas	Denmark, Northern Ireland (UK), Sweden, Türkiye
Indigenous students with special education needs	Ireland, Northern Ireland (UK)
Indigenous students from a disadvantaged socio-economic background	Ireland, Northern Ireland (UK)
Students with special education needs in rural areas/disadvantaged geographical areas	Korea, Northern Ireland (UK)

Note: Based on answers to the question: "Are there specific policies that target the intersection of any of the following groups of students at ISCED 2 level?"
In the Flemish Community of Belgium, the responses relate to research projects commissioned by the Ministry of Education and Training, not formal education policies or legislation.
Source: OECD (2022[41]) Strength through Diversity Policy Survey 2022.

Even though the concept of intersectionality is complex and multidimensional (Hancock, 2007[117]), an intersectional approach to policy making is important to promote equity and inclusion in education. Research and policies addressing single dimensions of diversity may not identify, reflect or address the needs of individuals with intersecting identities. Consequently, policies targeted at separate dimensions of diversity without an intersectional lens may not be able to address adequately issues that they were meant to solve. For instance, students with an immigrant background can also come from a minority ethnic background and can face language barriers, victimisation due to their ethnicity and stereotyping resulting from their immigrant heritage. These challenges need to be addressed comprehensively in order to fully include students into the education system (Varsik and Gorochovskij, Forthcoming[110]).

An intersectional approach also requires that marginalised groups be included within policy discussions and thus has the potential to transform the policy-making process through making policy makers more conscious of lived experiences (Hankivsky and Cormier, 2011[113]). In addition, an intersectional approach encourages considerations of micro- and macro-level influences that shape individuals' experiences (Bowleg, 2012[112]). Looking at socio-structural factors can transform research to explicitly consider the role

of systemic factors for individual outcomes. Such a focus on structural factors can also encourage interventions on a structural level, rather than just addressing issues on the individual or group-level (Varsik and Gorochovskij, Forthcoming[110]).

Furthermore, a focus on intersectionality could encourage a more comprehensive collection of disaggregated data and thus improve the study of the micro- and macro-level causes of inequalities (Bauer, 2014[118]; Bowleg, 2012[112]). In the context of education, data disaggregated by ethnicity or SEN are often missing (OECD, 2020[119]). By recognising and acting on the importance of disaggregated data collections on the policy level, researchers can be provided with valuable data points that can help them take into account real-lived experiences. Evidence created on this basis can close previous research gaps and provide policy makers with valuable insights useful to design and improve policies (Varsik and Gorochovskij, Forthcoming[110]).

An intersectional perspective can also promote the development of cost-efficient policies and interventions that are well-targeted at the populations with the highest needs (Bowleg, 2012[112]; Hancock, 2007[117]). Focusing on a single dimension of diversity ignores heterogeneity and may thus fail to address all members of the targeted group. An intersectional lens can help examine whether policies are having their intended effect and are properly reaching the full population of interest, encouraging policy success (ibid.).

Finally, in the academic and research arena, the usage of intersectionality as a framework can provide a unifying language, which can help connect discussions around reducing outcome disparities as a function of different dimensions of diversity (Bowleg, 2012[112]). Using intersectionality in keywords or abstracts could potentially develop a comprehensive body of literature across different scientific disciplines. This would enable researchers to engage in discussions and thus further advance the concept (Varsik and Gorochovskij, Forthcoming[110]).

Responsibilities for and administration of equity and inclusion in education

Another aspect of the governance of education to achieve equity and inclusion objectives is the allocation of responsibilities for the design and implementation of policies to achieve these objectives, including policies relating to the diversity of the education offer itself, the design of the learning environment, and policies governing school choice. Policies on equity and inclusion are often managed by a number of ministerial bodies, and governmental agencies and stakeholders also have responsibilities at various stages of the policy cycle.

Responsibilities for ensuring equity and inclusion in education are shared across different levels of government and different ministries

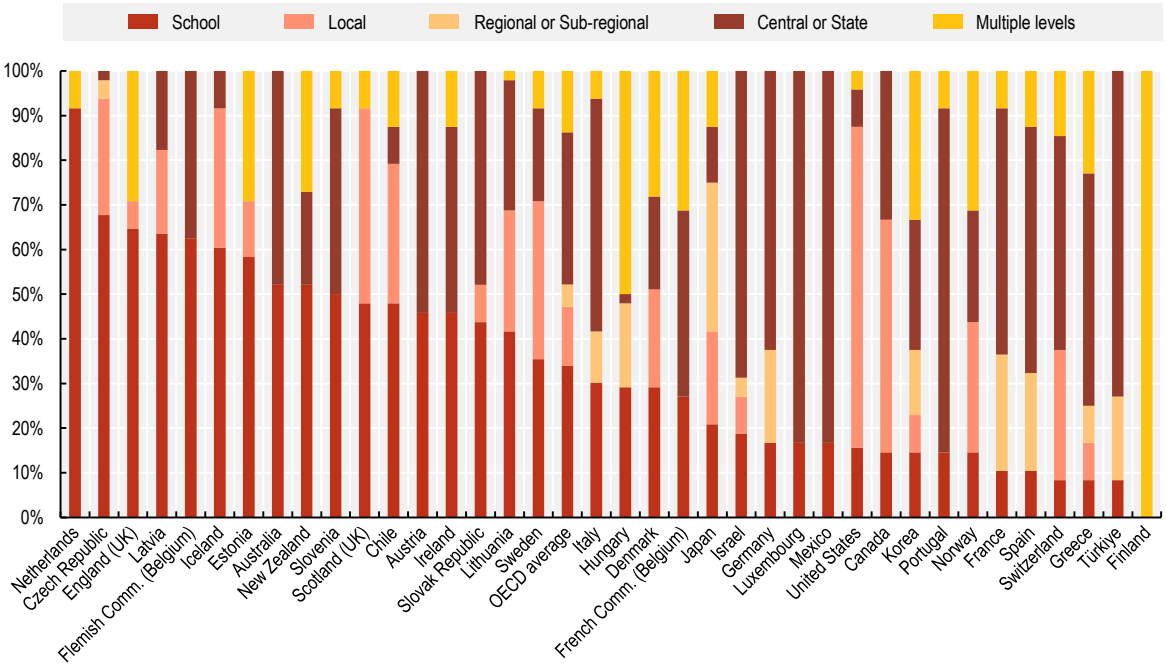
Vertical co-ordination

A wide range of institutions have responsibility for governing an education system in such a way as to promote equity and inclusion. These include education authorities both at the national level (e.g., ministry of education and dedicated units within it) and at the sub-national level (e.g., states, regions, municipalities). These authorities may have specific units within them responsible for ensuring equity and inclusion in education or for developing policies designed to meet the needs of specific student groups (e.g., students with SEN, children of immigrant families). In some countries, there are specific education governance and provision arrangements for specific groups (e.g., Māori-medium education in New Zealand, Intercultural universities in Mexico, Indigenous education living on reserves in Canada) (Cerna et al., 2021[2]).

Figure 2.5 shows that there was great variation between education systems with respect to the level of government where decisions are taken on education in 2017. In some education systems, such as the

Czech Republic, England (United Kingdom), the Flemish Community of Belgium, Iceland, Latvia, and the Netherlands, over 60% of decisions relating to public lower secondary education were taken at the school level. However, in education systems such as Luxembourg, Mexico and Türkiye, over 70% of decisions were taken at the central level. The local level played a key role in federal systems such as Australia, Canada, Germany and the United States.

Figure 2.5. Percentage of decisions taken at each level of government in public lower secondary education (2017)



Note: Countries are ranked in descending order of the percentage of decisions taken at the school level.
Source: Adapted from OECD (2018[120]), Education at a Glance 2018: OECD Indicators, Figure D6.1., https://dx.doi.org/10.1787/eag-2018-en.

This has implications for policies on equitable and inclusive education. Most countries govern equity and inclusion in education by combining central direction (either at the national or sub-national level) over policy development and standard setting with some measure of devolved responsibility for the implementation of policies impacting on equity and inclusion at the local and school levels. Indeed, 15 OECD countries with available data in the Profiles Enhancing Education Reviews collated by UNESCO indicated that responsibilities on inclusion in education are shared between central and local levels (UNESCO, n.d.[121]). The devolution of measures to support equity and inclusion in education to the local level is typically accompanied by nationally set frameworks, guidance materials, and tools for the use of school agents (Cerna et al., 2021[2]). The central departments often formulate overall goals for the education system in co-operation with a wide range of stakeholders. The local entities in turn support the central departments in implementing these goals (UNESCO, n.d.[121]).

In a way, decentralisation can be viewed as the natural response to complexity (Burns and Köster, 2016[122]). The reasons behind decisions to decentralise education systems vary across countries, but the most common arguments involve increased efficiency, improved financial control, reduced bureaucracy, increased responsiveness to local communities, more creative management of human resources,

improved potential for innovation, and creating conditions that provide better incentives to improve the quality of schooling (OECD, 2018[120]).

However, decentralisation can also impact equity in education adversely, given that communities' priorities on reallocation of funds can vary due to differences in local preferences and incomes (Kim and Dougherty, 2018[123]). Decentralisation can incentivise advantaged families to relocate thus biasing the use of funds towards socio-economically advantaged students (ibid.).

Moreover, even in decentralised systems, the national (or sub-national) central-level institutions remain responsible for the overall regulation of the system and act as top-down enforcers of quality standards if schools consistently fail to meet expectations (Burns and Köster, 2016[122]). For instance, ministries of education remain responsible for ensuring high-quality, efficient, innovative and equitable education at the national level. They must fulfil this function while at the same time an increasingly wide spectrum of stakeholders gets involved in the policy-making process, including local administration, other ministries, teacher unions, national boards, students' representatives and others.

Decentralisation can increase inequality if it does not consider regional and local needs. While Kim and Dougherty (2018[123]) did not find a statistically significant relationship between the decentralisation of funds and inequality in education outcomes in the review they undertook for the OECD, they also acknowledged that this might be due to other policies being in place that offset or mitigate any adverse impacts of decentralisation, such as additional funding to decentralised bodies (ibid.). Countries should therefore take efforts to adequately responsibilities delegated to regional and local levels. In the Netherlands, for instance, the Ministry of Education has entered into agreements with several municipalities to track and provide additional funding for programmes that targeted the language development support of disadvantaged children (OECD, 2017[124]). Following a decentralisation reform in Colombia, the Ministry of National Education has provided guidelines for inclusive education while regional education departments implement the policy, raise awareness and develop implementation plans (Ministerio de Justicia y del Derecho [Ministry of Justice and Rights], 2017[125]).

Horizontal co-ordination

In addition to vertical co-ordination (central to local levels), sharing or coordinating responsibilities among government departments or government and non-government actors can have positive impacts for equity and inclusion in education. Although evidence is scarce and often focused on early years, the successful integration of services can, for instance, result in more efficient identification of children's needs, including health, well-being, participation, social justice and equality. Services that provide holistic care are also more accessible, more likely to be approached and thus improve the outcomes of those with complex needs (CfBT Education Trust, 2010[126]; Corter, 2021[127]; OECD, 2015[128]; UNESCO, 2020[16]).

Integration of services has also been promoted for its potential in terms of quality and efficiency gains (UNESCO, 2020[16]). If multiple services are provided at single sites, this can lead to reduced costs of travel that is particularly important for disadvantaged groups.

Integration can only work in systems where stakeholders are willing to co-operate and coordinate. There are often barriers in the form of deep-rooted norms, traditions and bureaucratic cultures that can hinder the process of integration (UNESCO, 2020[16]). Other barriers may relate to obstacles associated within effective governance in general, such as ineffective communication with educators, lack of shared vision or overarching policy framework (Lawrence and Thorne, 2016[129]; Lord et al., 2008[130]; UNESCO, 2020[16]).

Efficient co-operation across institutions in a whole-system approach has been recognised as one of the attributes of high performing systems (Burns and Köster, 2016[122]; Schleicher, 2018[131]). This means alignment and coherence of the policies and practices over sustained periods of time and their consistent implementation. Finding the right balance between potentially conflicting forces - such as accountability and trust, innovation and risk-avoidance, and consensus building and making difficult choices - requires

the alignment of roles and responsibilities across the system, while at the same time improving efficiency and reducing potential overlap or conflict (Burns and Köster, 2016[122]).

Data from the European Agency for Special Needs and Inclusive Education relating to 18 countries in 2014-15 showed that, in many counties, several government departments or ministries were responsible for meeting the needs of learners with SEN. Education ministries were mostly responsible for the governance of learning settings and providing additional teachers and learning materials. Health ministries were most often responsible for screening, assessment and rehabilitation services, social protection ministries for the provision of financial aid and advice, and transport and public works ministries for promoting infrastructure accessibility. Finally, regional and local authorities were mostly responsible for physical accessibility or extra-curricular support (European Agency for Special Needs and Inclusive Education, 2016[132]; UNESCO, 2020[16]). More recent data from 2020 from 16 OECD countries paints a similar picture: health ministries were mostly responsible for screening and assessments of disabilities (UNESCO, n.d.[121]). Several countries also highlighted the existence of inter-ministerial committees or commissions on inclusion of disability affairs (ibid.). For instance, Hungary established the Inter-Ministerial Committee on Disability Affairs in 2015. This advisory and consultative committee is operated by the State Secretariat of Social Affairs and Social Inclusion. Every ministry and every state secretariat (including the State Secretariat of Education) designates a member for this committee (UNESCO Global Education Monitoring Report, 2021[133]).

Finally, several countries have established ministerial bodies and governmental agencies specifically to support the objectives of equity and inclusion for students with SEN. Some examples are the Advisory Council on Special Education of Ontario's Minister of Education, Canada (Ontario Ministry of Education, 2018[134]) and the Special Education Section in Ireland (Brussino, 2020[91]; Ireland Ministry of Education, n.d.[135]). In the area of education for gifted students, responsibility is typically distributed across a number of bodies, which may include, in addition to the ministries of education, national institutions, inter-ministerial agencies and research centres (Rutigliano and Quarshie, 2021[55]). In Austria, for example, the administering actors for gifted education are the Federal Ministry for Education, Art and Culture; the Federal Ministry of Science and Research; and the Austrian Research and Support Centre for the Gifted and the Talented. In some other countries, sub-national authorities have responsibility for identifying, designing and implementing plans for gifted students. These include Canada, Germany, Spain, Switzerland and the United States (Rutigliano and Quarshie, 2021[55]).

Specific agencies have also been established to promote equity and inclusion in relation to gender. The Swedish Gender Equality Agency, for instance, was established in 2018 to guarantee the adequate implementation of the Swedish Gender Equality Policy. One of the objectives of the Gender Equality Policy is to ensure that women and men as well as girls and boys have the same opportunities and conditions regarding education, study options and personal development. The agency coordinates with and provides different forms of support and expertise to other government agencies as well as municipalities, regions, civil society and businesses in order to achieve gender equality policy goals (Government Offices of Sweden, 2022[136]). In Finland, the Centre for Information on Gender Equality (National Institute for Health and Welfare) operates as a national service providing research-based information on gender equality. One of the Centre's focus areas is the state of gender equality in the education sector. In particular, Finland's key gender equality policy goal is the reduction of gender segregation in educational choices (European Institute for Gender Equality, 2017[137]).

Stakeholder engagement is crucial for ensuring equity and inclusion in education

Effective governance requires building the capacity of partners and encouraging open dialogue and engagement with stakeholders (Burns and Cerna, 2016[138]). Indeed, ensuring the widest possible stakeholder participation has been recognised as key to achieving equitable and inclusive education systems (UNESCO, 2021[139]). Stakeholders play an important role in shaping and implementing policies

to promote equity and inclusion in education based on a shared understanding of the concepts (Ainscow, 2005[140]; European Agency for Special Needs and Inclusive Education, 2021[141]).

Many countries have developed engagement mechanisms to collect the views of stakeholders (such as teacher unions, employers' organisations, representatives of parents/guardians and students, organisations who seek to represent provide support to specific diverse groups). In particular, civil society organisations often play an important role in communicating and representing the needs to specific disadvantaged groups before government authorities, both nationally and locally, and often work in partnership with governments to ensure the inclusion of these groups. Sometimes, these organisations benefit from the financial support of public institutions. In many countries, these organisations provide practical help (financial and material) and moral support (valorisation, cultural activities) to diverse and disadvantaged groups, and sometimes fill gaps in situations where support is not provided or needs are not met by governmental actors (Cerna et al., 2021[2]; Ulleberg, 2009[142]).

Stakeholder engagement can come in many forms. The following classification of stakeholder engagement – developed for the specific example of inclusive water governance, but equally relevant to education (OECD, 2015[143]) – distinguishes between six types of stakeholder engagement depending on the processes and intentions pursued: i) communication; ii) consultation; iii) participation; iv) representation; v) partnership; and vi) co-decision and co-production. A description of these types of engagement are provided in Box 2.6.

Box 2.6. Six levels of stakeholder engagement

The OECD (2015[143]) identified six levels of stakeholder engagement in the area of water governance, which have been adapted to the area of equity and inclusion in education.

Communication

As the first level of stakeholder engagement, communication involves making information and data on equitable and inclusive education polices available to all. Information sharing can be done through a variety of channels, such as traditional and social media and get-together workshops (Siarova and van der Graaf, 2022[144]). Communication can also aim to raise awareness to make the targeted audience more knowledgeable and sensitive to a specific issue, such as the rights and needs of students, pedagogical needs of teachers and current gaps in education provision.

Consultation

Consultation seeks to gather stakeholders' comments, perceptions, advice, experiences and ideas. The process is often initiated by decision makers looking for insights and views from the stakeholders involved or who will likely be affected by the outcomes (OECD, 2015[143]). Consultation may involve a wide range of tools starting with discussion fora such as round tables, town meetings, focus groups and surveys (in-person or electronic) followed by other feedback mechanisms such as public opinion polls or comment periods on a draft policy. The process can also include tools for more continuous consultation such as citizen's panels and advisory committees of interest group representatives, e.g., institutionalised advisory bodies (Rietbergen-McCracken, 2010[145]).

Participation

Participation implies that stakeholders are meaningfully involved in the decision-making process, taking an active part in discussions and activities. In these stakeholder activities, the aim is often to improve transparency in decision making and strengthen the foundation on which decisions are taken. This would mean ensuring the actual involvement of a range of education actors in evidence production (for instance through mandating and providing incentives to schools, non-formal education providers and

community-based organisation to collect data on specific needs of families and their integration experiences), in the evaluation of practices and policies, and then in the interpretation of the produced evidence for practice and policy (re)design (Siarova and van der Graaf, 2022[144]).

Representation

Representation is a more structural and institutionalised level of stakeholder engagement. It often consists in having stakeholders' perspectives and interests officially represented in existing structures and policy processes (OECD, 2015[143]). For example, in the case of refugee education, representation can take the form of advisory bodies composed of different types of stakeholders or refugee and integration councils composed of representatives of refugee communities. Typically, stakeholders are involved in the various aspects of design, development, implementation and evaluation, and have a say in the strategic and operational decision-making processes. In such contexts, it is key that involved stakeholders, and educational communities in particular, are addressed as active agents of change (Siarova and van der Graaf, 2022[144]).

Partnerships

Partnerships are the next formalised level of engagement. They consist of agreed-upon collaboration between institutions, organisations, or civil society to combine resources and competences in relation to a common challenge (OECD, 2015[143]). Partnerships can take place at various scales, from local partnerships between municipalities to regional and international partnerships aiming to bring innovation and solutions to segregation, such as the European Union Urban Agenda Partnership to expand the Europe-wide knowledge base on immigrant integration at the urban and/or regional level. Such partnerships can be possible if there is sustainable state funding for data collection and research and policies that encourage practitioners, researchers and other education stakeholders to participate in the design and development of interventions (Siarova and van der Graaf, 2022[144]).

Co-production and co-decision

Co-production of policies and co-decision are the ultimate levels of stakeholder engagement as they are characterised by a balanced share of power over the policy-making process. In OECD countries, it has been proven that co-decision and co-production in public services have led to cost reductions, better service quality and improved user satisfaction (OECD, 2015[143]).

In the context of equitable and inclusive education, co-production depends on having the right mix of leadership, capacity, and empowerment of all the stakeholders involved to ensure that all stakeholders feel responsible for and own the change process as well as contribute in a meaningful way.

Source: Adapted from OECD (2015[143]). Stakeholder engagement for inclusive water governance, https://doi.org/10.1787/9789264231122-en; Siarova and van der Graaf (2022[144]), Multi-stakeholder approach for better integration of refugee students, OECD Education Working Paper No. 265, https://doi.org/10.1787/82b390fb-en.

The following country examples highlight stakeholder engagement in equitable and inclusive education. In general, governments often engage in communication and consultations (i.e., the lower levels of stakeholder engagement). For example, in Portugal, the adoption of the 2018 legislation on inclusive education followed an evaluation process of the previous ten years' policies and practices and a broad national consultation. In preparation, a working group was established that was composed of State Secretaries and representatives from various government organisations. The consultation process engaged many stakeholders including academics, teachers and teacher unions, parents' associations, organisations for disabled persons and the general public. Public consultations on the draft law took place both in writing and through several open talks organised across the country (OECD, 2022[6]).

Another example of consultation stems from England (United Kingdom). A review of its school funding system was launched in 2016, with the aim of designing a new national funding formula that would be fair, transparent, simple, predictable and efficient and, at the same time, provide opportunities for more funding for staff working directly with students. To support this review, the government launched extensive consultations with relevant stakeholders so as to hear their perspectives on what the funding formulae should look like, including on how to define the weights to be attributed to each factor, the unit values and to illustrate the impact that these changes in the formulae would have (Department of Education, 2017[146]).

In Costa Rica, consultation procedures and mechanisms for the participation of Indigenous peoples in the decision-making processes that concern them in the field of education are defined in the 2009 decree on the Indigenous education subsystem (UNESCO Global Education Monitoring Report, 2020[147]). The decree provides for the establishment of three types of permanent mechanisms to promote the participation and consultation of Indigenous peoples: a National Advisory Council on Indigenous Education, Local Councils for Indigenous Education, and Indigenous education and administrative boards. The decree specifies that a Local Council for Indigenous Education is to be established in each Indigenous territory and is to be consulted on a mandatory basis in processes relating to the appointment and recruitment of personnel in educational services (Sistema Costarricense de Información Jurídica, 2022[148]).

The examples of New Brunswick (Canada) and the Flemish Community of Belgium below highlight a higher level of stakeholder engagement through partnerships between the Ministry of Education and other institutions or between schools and local education authorities. Such partnerships can help provide the necessary support and mechanisms to implement equitable and inclusive policies in schools and own the process of change (UNESCO, 2017[15]). In New Brunswick, Canada, extensive consultations with educators and other stakeholders were undertaken before passing major reforms on inclusive education, including Bill 85 and Policy 322 (AuCoin, Porter and Baker-Korotkov, 2020[101]). However, as the province recognises that consultation with stakeholders is not sufficient without greater continuous engagement with the education community, New Brunswick's journey to inclusive education supports the view that an entire community of stakeholders and partners must be engaged through partnerships and collaboration to make inclusive education a success (Ainscow, 2005[140]; AuCoin, Porter and Baker-Korotkov, 2020[101]; Zundans-Fraser and Bain, 2015[149]).

In Belgium, the Flemish Community introduced Local Consultation Platforms (*locale overlegplatformen*) as a tool to create school learning communities and promote collaboration and links between schools and local stakeholders. Local Consultation Platforms bring together social partners, teachers, parents and different institutions with the aim of ensuring equal access to educational opportunities, improving social cohesion, providing optimal learning chances and tackling segregation in schools. These platforms provide an analysis of the school environment, encourage socio-economic diversity and bring insight on how to avoid segregation. Local Consultation Platforms also collaborate with municipalities and keep track of newcomers, trying to provide support for skills assessment and their allocation to particular schools. Additionally, they can provide support in teacher education programmes as well as advice to schools on the ways to engage parents and local communities (European Commission, 2018[150]).

Education provision can be designed to support the goals of equity and inclusion

The design and diversity of education offerings are important for effectively responding to the diverse needs of students. Three particularly important ways through which the educational provision can impact on equity and inclusion goals are: the diversity of educational offerings (e.g., range of study pathways), the specialisation of learning environments (e.g., specialised classrooms for students with SEN) and the design of school choice policies (Cerna et al., 2021[2]).

Diversity of educational offerings

To deliver the curriculum and realise students' learning objectives, countries establish study programmes, disciplinary subjects, and study pathways at the primary and secondary level. The diversity of such educational offerings has considerable impact on the extent to which education systems are able to accommodate the whole diversity of students' abilities, interests and backgrounds and grant equal educational opportunities to all. For instance, an adjusted curriculum can be developed to increase the motivation of gifted children and improve their learning outcomes (Cerna et al., 2021[2]) (see also the section on Curriculum for equity and inclusion). In addition, offering Indigenous languages as part of study options or delivering some subjects in an Indigenous language is a strategy to improve the sense of self-worth and belonging of Indigenous students and to improve the intercultural competencies of non-Indigenous students (OECD, 2017[32]).

In Canada, Indigenous peoples comprise over 50 distinct and diverse groups, each with its own language and traditional land base (Ball, 2014[151]). Canada is a bilingual country with English and French as the two official languages, but jurisdictions may give official status to Indigenous languages. The Yukon Territory, for example, has its own Official Languages Policy that recognises eight Indigenous languages in addition to French and English. As result, all public schools have Indigenous language programming, from kindergarten upwards (Kral et al., 2021[152]). All students – Indigenous and non-Indigenous – attend the Indigenous language class in kindergarten. These classes help First Nations children's transition to public schooling (Meek, 2017[153]).

Similarly, some countries offer preparatory (sometimes called welcome, reception or transition) classes for newly arrived immigrant and refugee students. These are separate classes or lessons where students are provided with intensive language teaching or an adapted curriculum for other subjects and can improve the integration of non-native speakers (European Commission/EACEA/Eurydice, 2019[154]). Examples include Germany, Finland, Slovenia and Sweden (Cerna et al., 2019[36]; OECD, 2018[155]). In Germany, young refugees and newcomer students usually attend a welcome/preparatory class for a period of between one and two years to learn the German language and connect with the German education system. These classes are mostly based in mainstream schools. After reaching a certain German language level, refugee and newcomer students join a mainstream class. In some cases, this is a gradual process, with students participating in some mainstream lessons until they are ready to fully integrate into the class. In some regions, there is the opportunity to enrol in a mainstream class directly. In some Länder, refugee and newcomer students who live in reception centres are not allowed to attend mainstream schools, but rather attend compensatory lessons in the centre, which mainly do not follow the standards and curriculum of mainstream schools (Koehler et al., 2018[156]; Koehler, Palaiologou and Brussino, 2022[157]).

Finland has introduced preparatory classes to facilitate immigrant and refugee students' entry into basic and secondary education. The preparatory classes are available in either Finnish, Swedish, or the child's native language. Finland's Ministry of Education and Culture on Immigrant Issues recognises the importance of aiding the development of immigrant students' mother tongues, and, in 2014, more than 16 000 students participated in courses taught in their own mother language. This has resulted in 53 different languages being taught in Finland (OECD, 2018[158]). Another example is from Slovenia, which provides both preparatory classes to newly arrived immigrant and refugee children and continuing or advanced classes to support their language development during the school year. The continuing classes consist of an individual programme or plan of activities that may include remedial or supplementary classes in Slovenian either before or after school so that students can be integrated into mainstream classes with their native-born peers (ibid.).

Preparatory classes can be particularly important at the secondary level when students are older and therefore less likely to pick up the new language (European Commission/EACEA/Eurydice, 2019[154]). Moreover, in secondary education, the curriculum subjects and requirements are increasingly complex and so demand a good command of the language of instruction (Koehler, 2017[159]). However, preparatory

classes can hinder integration by separating migrant students from their native-born peers; and they may lead to delays in migrant students' educational progress if there is too strong a focus on learning the language of instruction over curriculum content (Nilsson and Bunar, 2015[160]). It is therefore important that a variety of learning support measures are provided, such as setting upper limits on class sizes to ensure better learning conditions, or providing specific teaching material adapted to the needs of students (European Commission/EACEA/Eurydice, 2019[154]).

Study pathways in education

Study pathways are important at both primary and secondary levels, and can influence access to tertiary education and transition to labour markets. The way in which education systems organise different levels, sectors and programmes of education affects how children and families engage with and transition through the schooling process (OECD, 2018[155]). In OECD countries, students choose between (or are selected into) a great variety of educational pathways such as general or vocational tracks, separate or mainstream schools or classes for diverse student groups, and different programmes within schools. Offering students and families a variety of educational pathways and parallel programmes can help ensure an educational provision that matches each student's interests and potential. However, it may lead to increased segregation, mismatches in students' pathway choices and a fragmentation of the educational offer (OECD, 2018[155]).

The transition between lower and upper-secondary levels of education is often one of the most difficult ones. This transition point is frequently aligned with movement into general and VET tracks and happens in many countries near the age for the end of compulsory education. As a result, it can be an important point for some students leading to either early school leaving or tracking into an educational programme that prepares students for entry into either post-secondary education or the labour market (OECD, 2018[155]).

Study pathways also raise equity concerns. There is great variation in the completion of upper-secondary education across OECD countries. While more than 90% of individuals in Greece, Korea and Slovenia below the age of 25 graduate from upper-secondary education, less than 70% in Costa Rica, Mexico and the United Kingdom are able to complete their degrees by this age (OECD, 2021[161]). In addition, there is variation between general and vocational programmes. On average across OECD countries, 63% of young adults in 2020 were expected to graduate from upper-secondary general programmes before the age of 25, compared to 37% for vocational programmes (OECD, 2022[162]). OECD (2018[120]) evidence shows that students' socio-economic background is a key determinant of their enrolment in vocational programmes: in all countries with available data, students whose parents have lower educational attainment are substantially over-represented in vocational programmes (see also the section on Vocational tracks in secondary education).

Student selection in education

Student selection can take different forms, and is often based on academic performance (OECD, 2012[163]). In some countries, selection consists of tracking students into different study programmes, usually in different schools or different classrooms within the same school with different curricula and final qualifications. These generally lead to either academic or vocational programmes, and to different further educational opportunities and professional prospects. In other countries, although students follow similar curricula, they are grouped into classrooms according to their abilities and are taught at different levels of difficulty, both in the orientation and pacing of instruction. In some countries, ability grouping occurs in all subjects while in other countries it is limited to one or few subjects. The extent of differentiation by school admission or grouping within the school in OECD countries is shown in

Table 2.3.

Table 2.3. Types of differentiation in lower secondary across OECD countries

	First age at selection in the education system	Number of school types or distinct education programmes available to 15-year-old students	Percentage of students in schools where students' records of academic performance are sometimes or always considered for admittance	Percentage of students in schools that group students by ability into different classes for some or all subjects	Percentage of students in schools that group students by ability within their class for some or all subjects
Australia	16	1	67.8	83.6	69.8
Austria	10	4	81.8	10.7	31.3
Belgium	12	4	49.5	40.2	47.4
Canada	16	1	49.5	82.1	50.1
Chile	16	3	20.7	27.3	43.3
Colombia	15	3	71.2	34.7	30.8
Costa Rica	15	3	68.0	47.1	80.1
Czech Republic	11	5	60.7	20.5	56.7
Denmark	15	4	23.8	23.4	74.4
Estonia	16	1	58.8	33.6	58.7
Finland	16	2	11.0	31.8	54.3
France	15	3	61.4	16.4	43.1
Germany	10	5	65.9	27.6	41.8
Greece	15	2	12.3	9.7	19.6
Hungary	10	3	93.1	29.4	78.1
Iceland	16	1	12.4	11.0	47.8
Ireland	15	2	21.2	92.8	52.4
Israel	15	2	63.8	97.9	72.9
Italy	14	4	64.9	13.8	49.9
Japan	15	4	100.0	49.3	50.3
Korea	15	3	58.8	28.4	57.9
Latvia	16	4	51.2	19.1	45.9
Lithuania	14	3	47.2	42.9	62.3
Luxembourg	11	4	82.5	64.3	45.5
Mexico	15	3	62.4	45.9	67.6
Netherlands	12	4	91.6	68.4	79.9
New Zealand	16	1	54.1	84.3	83.5
Norway	16	1	6.4	13.1	47.8
Poland	16	1	52.9	33.4	80.9
Portugal	15	3	20.3	11.8	15.9
Slovak Republic	11	4	68.2	35.7	60.2
Slovenia	14	3	69.7	35.0	56.3
Spain	16	2	15.3	38.4	41.5
Sweden	16	1	6.6	16.0	25.0
Switzerland	12	6	62.7	69.2	62.6
Türkiye	11	3	93.6	54.4	44.2
United Kingdom	16	1	22.8	98.5	71.1
United States	16	1	45.9	87.0	70.7
OECD average	14.2	2.8	51.4	42.7	53.8

Note: The terminology for the last category has been adapted to match the terminology of the Strength through Diversity Project.

Source: OECD (2019[164]), PISA 2018 Results (Volume I): What Students Know and Can Do, Table B3.3.3, https://doi.org/10.1787/5f07c754-en and OECD (2020[165]), PISA 2018 Results (Volume V): Effective Policies, Successful Schools, Table V.B1.3.4, Table V.B1.3.7, https://doi.org/10.1787/ca768d40-en.

As the table above illustrates, all OECD education systems introduce some form of tracking by the age of 16 at the latest, with the average age of first formal selection is 14 years in OECD countries. More than two-thirds of the education systems start this process from or after the age of 15. Three countries (Austria, Germany and Hungary) start tracking at the age of 10. A number of countries including Australia, Canada, Chile, Estonia, Finland, Iceland, New Zealand, Norway, Sweden, Spain, the United Kingdom and the United States introduce differentiated educational pathways at the age of 16.

In addition to the age at which students are allocated into different tracks, the number of tracks and the degree of differentiation between them can influence the variation in student outcomes and the level of educational inequalities, with research showing that the higher the number of school types and/or pathways in an education system, the larger the impact of socio-economic background on educational performance (Ammermüller, 2005[166]; Horn, 2009[167]).

Table 2.3 indicates that the number of tracks varies between one and six across OECD countries (with an OECD average of 2.8). PISA 2018 shows that countries with fewer academic programmes available to 15-year-olds tend to select students into different programmes at an older age. OECD countries that offer only one academic programme to 15-year-olds (Australia, Canada, Denmark, Estonia, Iceland, New Zealand, Norway, Poland, Sweden, the United Kingdom and the United States) select students into programmes at the age of 16 or later. Similarly, all countries that offer two academic programmes select students into programmes at the age of 15 or later. By contrast, countries with more academic programmes available to 15-year-olds tend to track students at an earlier age (OECD, 2020[165]).

School selection policies based on academic performance can also impact equity.

Table 2.3 shows that on average across OECD countries, around 50% of students are in schools where students' records of academic performance are considered for admittance. However, there is a wide variation between countries such as Norway and Sweden (with around 6% of students in schools using a record of academic performance for admittance) and countries such as Hungary, Japan and Türkiye (with more than 90% of students in such schools).

Students can also be grouped by ability in different classes for some or all subjects.

Table 2.3 indicates that across OECD countries, 42.7% of students are in schools that group students by ability into different classes. Again, there is great variation between countries. In countries such as Austria and Greece, around 10% of students are in schools that group them by ability into different classes. In contrast, in countries such as Ireland, Israel and the United Kingdom, over 90% of students are in schools that group them by ability into different classes. In addition, 53.8% of students are in schools that group students by ability in their classes (

Table 2.3). However, the percentages vary considerably across countries. In Greece and Portugal, fewer than 20% of students are in schools that group students by ability within their class, compared to around 80% of students in Costa Rica and the Netherlands (OECD, 2020[165]).

Impact of student selection on equity

Student selection and tracking policies determine the way students are grouped together or directed to separate classrooms, pathways and schools according to their abilities (Shavit and Müller, 2006[168]). Overall, they have been recognised as exacerbating differences in learning between students and in educational inequities (OECD, 2012[163]), with evidence showing that the track where students are assigned has a great impact on their educational and life prospects (Shavit and Müller, 2006[168]). The existence of different pathways and schools affect learning in two ways. Firstly, the teaching environment can vary,

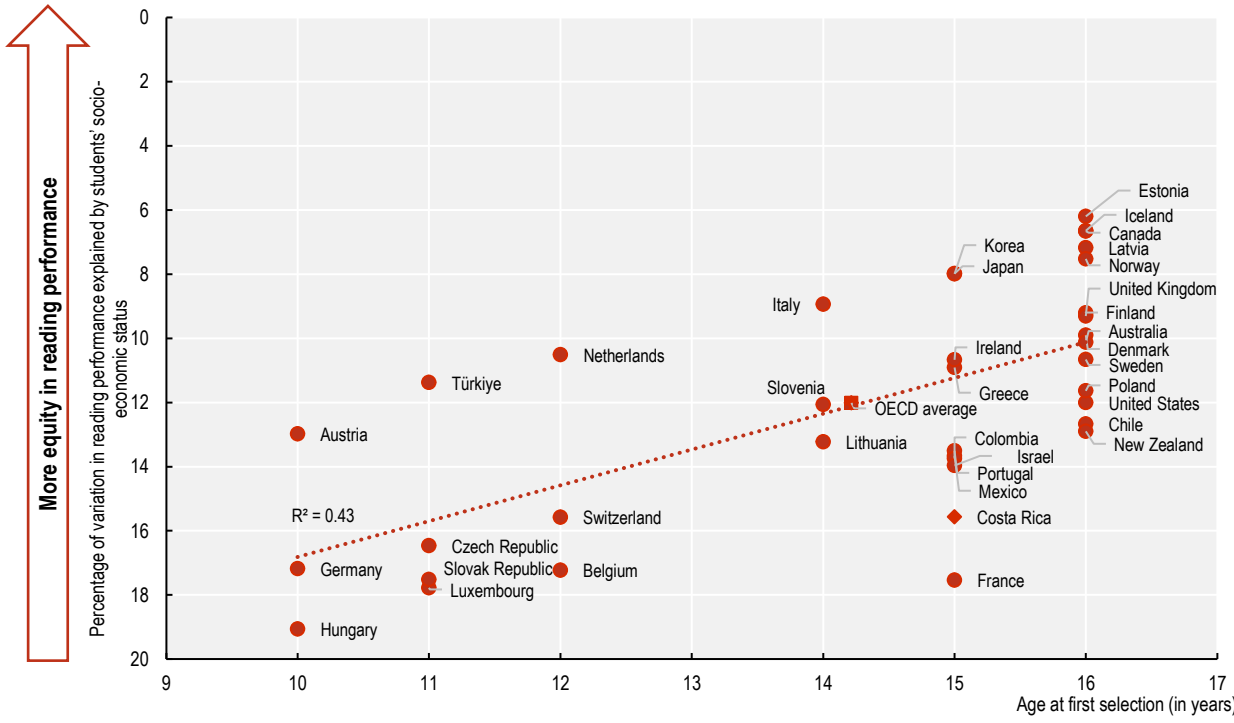
since it depends on the curriculum, the teachers and the resources. Less demanding tracks tend to provide less stimulating learning environments (OECD, 2012[163]; Oakes, 2005[169]). Secondly, students' outcomes can also be affected by the students alongside them (Field, Kuczera and Pont, 2007[170]; Ammermüller, 2005[166]; Hanushek and Wößmann, 2006[171]).

Students from lower socio-economic background are particularly affected by academic selection, and especially by early tracking (European Commission/EACEA/Eurydice, 2020[172]). They are disproportionally placed in the least academically-oriented tracks or groups early on, which widens initial inequities (Spinath and Spinath, 2005[173]). Other diverse groups of students may be negatively affected by academic selection such as early tracking. For example, students with an immigrant background may be locked into a lower educational environment before having the opportunity to develop the linguistic, social and cultural skills to attain their maximum potential (OECD, 2010[174]).

Studies have found that the earlier tracking is introduced, the wider the learning differences between students (Hanushek and Wößmann, 2006[171]; OECD, 2012[163]). There thus seems to be an adverse relationship between equity and the age at which students are channelled down different pathways. Early tracking is found to both widen the gap between low and high performers, and increase the impact of socio-economic background on performance (Contini and Cugnata, 2018[175]; Horn, 2009[167]; Schütz, Ursprung and Wößmann, 2008[176]). Early tracking magnifies early achievement, which is more influenced by socio-economic background than achievement in later years. This not only reinforces the parental background effect, but also contributes to reducing the educational expectations of less privileged students (Buchmann and Park, 2009[177]; Parker et al., 2018[178]; Parker et al., 2018[178]). Reduced educational expectation and aspiration in turn influences educational choices, thereby further decreasing the equity of educational outcomes. However, the effects of tracking vary depending on different factors, such as the age of first tracking; the number of tracks and the degree of differentiation; the labour-market orientation and size of vocational tracks; selection procedures; the permeability between tracks; and the prevalence of course-by-course tracking (European Commission/EACEA/Eurydice, 2020[172]). This may explain some of the ambiguity of the research evidence and suggests that the effects of tracking may be different in different countries (OECD, 2016[179]; Pekkarinen, Uusitalo and Kerr, 2009[180]).

PISA 2018 shows that students' age at first selection into different programmes was not consistently correlated to mean reading performance. However, selecting students into different programmes at an earlier age was correlated with less equity in reading performance, even after accounting for per capita GDP across OECD countries, and across all countries/economies. As shown in Figure 2.6, differences in the age at first selection accounted for 43% of the differences in equity in reading performance across OECD countries (OECD, 2020[165]).

Figure 2.6. Age at first selection and equity in reading performance



Source: Adapted from OECD (2020[165]), PISA 2018 Results (Volume V): Effective Policies, Successful Schools, Figure V.3.9, https://doi.org/10.1787/ca768d40-en.

Besides early tracking, academic selectivity and ability grouping can also impact equity. In particular, they can reinforce socio-economic differences between or within schools (European Commission/EACEA/Eurydice, 2020[172]; Chmielewski, 2014[181]). More specifically, while academic selectivity was not consistently correlated with mean student performance, OECD countries with fewer academically selective schools generally showed greater equity in student performance in 2018. Across OECD countries, the percentage of students in schools that never consider students' record of academic performance for admission was positively correlated with equity in reading performance, before and after accounting for per capita GDP (OECD, 2020[165]). Furthermore, across OECD countries, changes between 2009 and 2018 in the percentage of students attending a school where admission is never based on the student's record of academic performance were positively correlated with changes in equity in reading. This means that equity in education tended to improve in countries where the prevalence of academic selectivity decreased (ibid.).

In PISA 2018, the system-level correlation between ability grouping within class and mean reading performance differed depending on whether this kind of ability grouping was implemented for some subjects or for all subjects. The percentage of students in schools that group students by ability in class for some subjects was positively correlated with mean performance in reading, before and after accounting for per capita GDP, across OECD countries, and across all participating countries and economies. PISA 2018 shows that 18% of differences in mean reading performance across all countries/economies can be explained by cross-national differences in ability grouping in class for some subjects (OECD, 2020[165]).

In contrast, the percentage of students in schools that group students by ability within their class for all subjects was negatively correlated with mean performance in reading, before and after accounting for per capita GDP, across OECD countries, and across all participating countries and economies. PISA 2018 shows that some 23% of differences in mean reading performance across all countries/economies can be

explained by cross-national differences in ability grouping in class for all subjects. These findings suggest that the relationship between ability grouping in class and performance may be associated with the way ability grouping is implemented (OECD, 2020[165]). A number of countries and programmes have implemented policies and initiatives to mitigate the impacts of ability grouping and tracking (see Box 2.7).

Box 2.7. Mitigating the impacts of ability grouping and tracking

Some education systems have sought to reduce the impacts of tracking and ability grouping on equity by providing flexibility to change tracks or pathways, improving the selection methods for the different tracks or groups, and/or delaying the age at which students are allocated into different tracks. For instance, in Germany (where tracking begins relatively early), students are allowed to change tracks when moving from lower to upper secondary education (OECD, 2018[155]). In the Netherlands, teachers have the discretion to delay tracking of students in lower secondary education by placing them in "bridge classes", which allow for flexibility among the curricula associated with different tracks (OECD, 2018[155]; Gomendio, 2016[182]). The Flemish Community of Belgium has also sought to delay early tracking and retain more students from disadvantaged backgrounds in general education pathways as part of its "Master Plan for Secondary Education", which provides for a more comprehensive stage of schooling in lower secondary education (OECD, 2018[155]). Similarly, Austria has sought to mitigate the effects of early tracking and ability grouping in lower secondary education through the creation of the New Secondary School (*Neue Mittelschule*), which was introduced in 2008 as a pilot project and has since become the standard form of lower secondary school in the country. Rather than separate students into different ability groups in core subjects, which was the case previously, students are assessed on a differentiated grading scheme in years 7 and 8 and benefit from more individualised and project-based learning and competence orientation (ibid.).

While delaying early tracking appears promising as a means to reduce the impact of student background in the selection of study programmes, its effectiveness in practice depends on other complementary policies. These include the development of effective systems to monitor the characteristics of students going into different tracks and early diagnosis processes to assess students' learning needs and identify appropriate interventions to help them with challenges that may impact on their learning (OECD, 2018[155]).

To assist schools in mitigating the negative equity impacts that may arise from ability grouping, the Best Practice in Grouping Students Project in the United Kingdom has published a research-informed guide that sets out specific recommendations as to what schools should and should not do when grouping students (Francis et al., 2018[183]). These recommendations include:

- Making grouping as subject-specific as possible, in light of the fact students' attainment levels differ across subject levels;
- Grouping students by attainment alone and without regard to factors that can be subject to unconscious bias on the part of teachers, such as "effort" or "attitude to work";
- Regularly re-testing students and moving them between ability groups where appropriate;
- Using a lottery system when assigning borderline students to groups (to ensure there is no risk of bias in assigning students from particular backgrounds to lower or higher sets);
- Ensuring that all students have access to a rich curriculum, rather than reducing content and lowering standards for students in lower ability group levels; and
- Applying high expectations for learning opportunities, curriculum, behaviour and homework consistently across all sets.

Source: OECD (2018[155]), *Responsive School Systems: Connecting Facilities, Sectors and Programmes for Student Success*, https://doi.org/10.1787/9789264306707-en, Francis et al. (2018[183]), Dos and don'ts of attainment grouping, https://www.ucl.ac.uk/ioe/sites/ioe/files/dos_and_donts_of_attainment_grouping_-_ucl_institute_of_education.pdf (accessed 12 October 2022).

Vocational tracks in secondary education

Education systems often distinguish between general and VET tracks. VET can help engage learners in education and training by providing an attractive alternative to those who are not interested in academic learning in a typical classroom setting. It can therefore contribute to reducing dropout rates and to re-engaging early school leavers in the education system (OECD, 2021[161]).

However, evidence shows inequities in terms of the types of educational trajectories different students pursue, which impacts on future learning and employment opportunities. Young men and boys, for instance, are less likely to complete upper-secondary education and are also usually over-represented in vocational paths (OECD, 2021[161]). Socio-economically disadvantaged students (without at least one parent with higher education) are also more likely to enrol in upper-secondary vocational programmes than in general ones and less likely to complete the level (ibid.). Moreover, some young people might follow vocational tracks that do not necessarily respond to their needs and, if no proper bridging or pathways exist between tracks, this may jeopardise their future learning opportunities.

Various countries have put in place preparatory programmes, such as pre-apprenticeship programmes, and/or shorter programmes, to support vocational students at risk of dropping out. Such programmes provide additional support and coaching. France, for example, recently introduced the *prépa-apprentissage*, a pathway that aims to identify and close basic and employability skills gaps before starting an apprenticeship. Switzerland offers two-year 'EBA' apprenticeships (*Grundbildung mit Eidgenössischem Berufsattest*) designed for youth who face difficulties at school, struggle to find a three or four-year apprenticeship, or who are at risk of dropping out, which are supported by individual coaching designed to help participants improve their academic, technical and social skills (OECD, 2018[184]). Estonia established funding for VET institutions to set up new programmes for at-risk youth, namely young people who have fallen out of compulsory education, or those who are not in education, employment or training, students who need enhanced support, and those with poorly defined career goals. Institutions can use the grants for curriculum development, including planning for out-of-school learning, and for training and networking activities for school staff and partners in the workplace (OECD, 2021[185]). Austria's integrative apprenticeships programme targets vulnerable students at risk of dropout by offering them a special wage (negotiated with employers) and close guidance from a dedicated training assistant while providing employers with a targeted subsidy. Training assistants define the nature of the training contract between the employer and the apprentice, prepare the workplace for the apprentices' arrival, and provide academic support throughout the training programme (Kis, 2016[186]).

Some countries have also developed flexible and shorter types of learning opportunities to enable upskilling and reskilling of the labour force, personal development and widening access to vocational education and training. Finland, for example, implemented a modular approach in most vocational qualifications, designing a personalised learning plan for all learners and allowing them to acquire the required skills at vocational institutions, on the job or elsewhere (OECD, 2020[187]). However, the modularisation of VET programmes remains a challenge, especially for practical learning activities that are part of apprenticeship programmes.

More generally, countries have implemented a range of initiatives to address the barriers that young people may face in upper-secondary education and facilitate their engagement. Norway is considering providing more flexible upper-secondary education with no time limit – so that young people can take the time they

need, sometimes more than others and sometimes less – for completion (Ministry of Education and Research, 2021[188]). In Ireland, all students have the space to learn broadly, mature and develop in a Transition Year before the pressure of examinations (Department of Education, 2022[189]). New Zealand's National Certificate of Educational Achievement enables young people to choose subjects and courses flexibly, combining general and vocational content at different levels, tailored to their personal interests (Ministry of Education, New Zealand, 2022[190]). Organising the final stage of school education with more flexible timeframes and modules also means it is more open to adults returning to education.

Specialisation of learning environments

Although equity and inclusion might be the desired outcome, achieving this goal may, in some cases, require the provision of specialised learning environments for certain students. Providing specialised learning settings can be an effective strategy for responding to the needs of given students.

The different types of learning settings can be classified into six categories, following the example of the comprehensive model of settings that is offered in Ontario, Canada: i) Dedicated schools, ii) Dedicated classes, iii) Regular classes with indirect support, iv) Regular classes with resource support, v) Integrated classes, vi) Withdrawal classes (Mezzanotte, 2020[52]). The characteristics of these models are summarised in Table 2.4.

Table 2.4. Types of learning settings

Full/Part time	Placement	Description
Full time	Dedicated schools	The student can apply to specific schools, dedicated to students with moderate/severe learning disabilities.
	Dedicated classes: Special education class full time	The student is placed in a special education class, where the student-teacher ratio conforms to the standards, for the entire school day.
	A regular class with indirect support	The student is placed in a regular class for the entire day, and the teacher receives specialised consultative services.
Full/Part time	A regular class with resource support	The student is placed in the regular class for most or all of the day and receives specialised instruction, individually or in a small group, within the regular classroom from a qualified special education teacher.
Part time	Integrated classes: Special education class with partial integration	The student is placed in a special education class where the student-teacher ratio conforms to the standards, for at least 50 per cent of the school day, but is integrated with a regular class for at least one instructional period daily.
	A regular class with withdrawal assistance	The student is placed in the regular class and receives instruction outside of the classroom for less than 50 per cent of the school day, from a qualified special education teacher.

Source: Adapted from Ontario Public Service (2017[191]), Special Education in Ontario, https://files.ontario.ca/edu-special-education-policy-resource-guide-en-2022-05-30.pdf (accessed 11 January 2023)

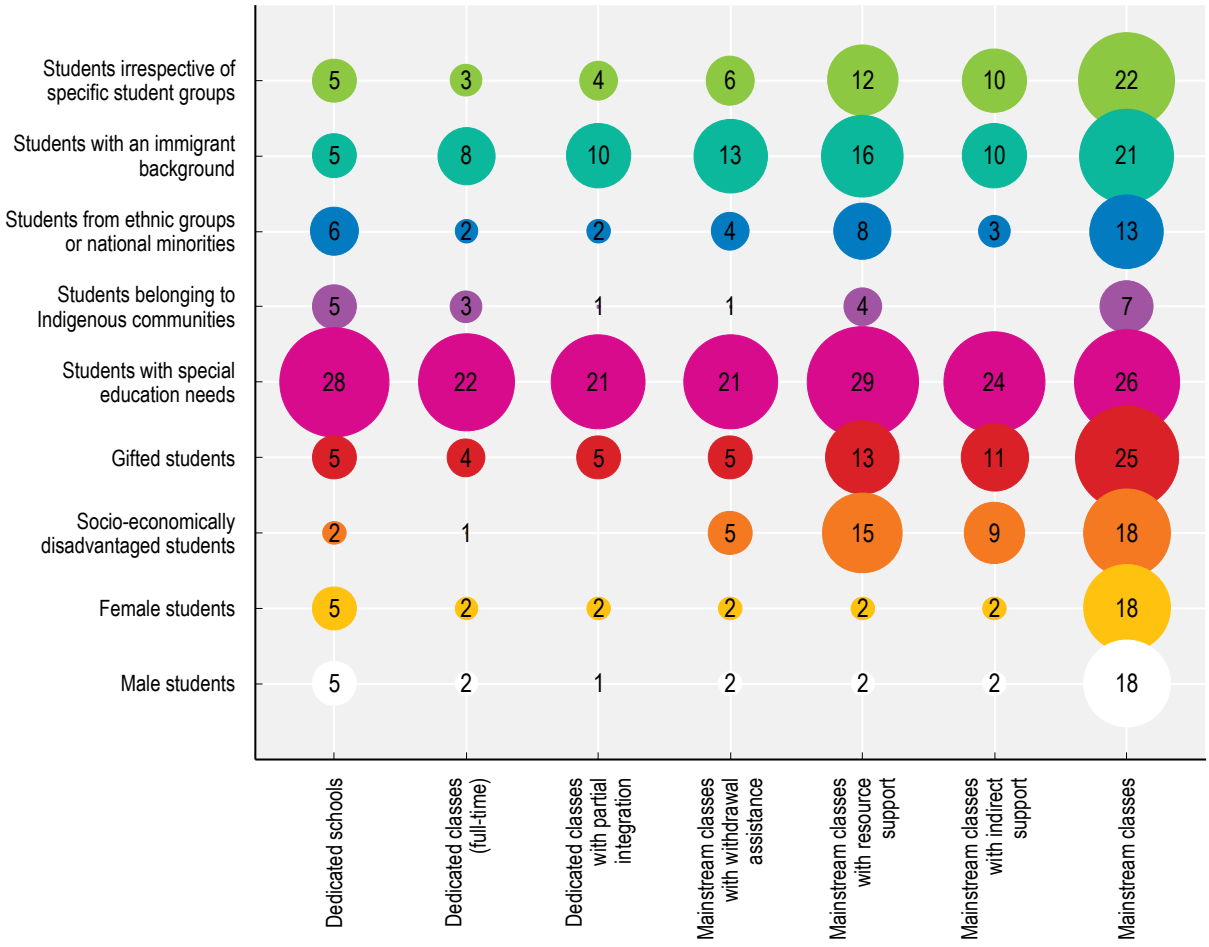
Figure 2.7 shows that learning environments are most often tailored to meet the needs of students with SEN, students with an immigrant background and socio-economically disadvantaged students. For all student groups, except for students with SEN and to some extent students belonging to Indigenous communities, learning settings are skewed towards mainstreaming students. In fact, no more than six education systems provided dedicated schools for students belonging to groups other than students with SEN. Indeed, except for students with SEN and students with an immigrant background, no more than five education systems provided dedicated classes. For all student groups, except for students with SEN, most education systems provided full-time mainstream classes, followed by mainstream classes with resource or indirect support.

With respect to students with SEN, most countries offer a range of options. These support options include specialised schools, exclusively dedicated to serve students with SEN, specialised classes within mainstream schools and the integration in mainstream classes within mainstream schools. In many education systems, students with SEN are included in mainstream classes with resource support (29 systems) or in dedicated schools (28 systems). Other settings include full-time mainstream classes (26 systems) and dedicated classes. Nonetheless, in some education systems, students with SEN are included in mainstream classes with indirect support, mainstream classes with withdrawal assistance, or dedicated classes with partial integration.

Finally, several education systems indicated that they provided various particular learning settings to students irrespective of specific student groups. This is understandable given that several education systems have “needs-based” approaches in which they evaluate student placements based on their needs rather than specific labels.

Figure 2.7. Learning settings (2022)

Number of education systems that provide the following settings (ISCED 2)



Note: This figure is based on answers to the question "Which education settings does the policy framework in your education jurisdiction provide for diverse groups of students at ISCED 2 level?". Thirty-three education systems responded to this question. Response options were not mutually exclusive. The numbers inside the bubbles indicate the sum of education systems that responded positively to the question above for that specific student group. Sizes of the bubbles are proportional to these sums.
Source: OECD (2022[41]), Strength through Diversity Policy Survey 2022.

StatLink https://stat.link/48gmj9

Some countries have established distinct education sub-systems that primarily serve a specific group of students. In New Zealand, the 1989 Education Act made provisions for Māori communities to set up and govern their own schools, which facilitated the establishment of a Māori-medium sector (Nusche et al., 2012[192]). The Māori-medium sector provides a range of learning pathways from early childhood education through to tertiary education. It aims to provide education in an environment where the values of Māori teaching and learning philosophies are promoted and Māori is used as the language of communication.

In the area of education for gifted students, national and sub-national education authorities in some countries have established selective schools. These schools usually focus on specific domains, including sciences, languages and music. For example, Korea has set up new educational institutions for gifted education, which include gifted secondary schools (specialised schools with autonomous curricula not subject to state regulation), gifted centres, and departments for gifted education (Rutigliano and Quarshie,

2021[55]). In Poland, gifted students can also choose specialised schools supported by the Ministry of Education or/and the Ministry of Culture in music, visual arts, ballet or sports (Limont, 2012[193]). In many other education systems, gifted education is rather exclusively provided either within the regular classroom or through extra-curricular activities, usually categorised as enrichment programmes (Rutigliano and Quarshie, 2021[55]).

There are some advantages and disadvantages of special education settings (Brussino, 2020[91]; D'Alessio, Donnelly and Watkins, 2010[194]; European Agency for Development in Special Needs Education, 1999[195]; Keslair, Maurin and McNally, 2012[196]; OECD, 2005[197]; World Health Organization, 2011[198]). On the one hand, full-time specialised support can potentially better meet the individual needs of students with SEN, particularly if student-teacher ratios are lower (as they typically are). Furthermore, teaching staff and school personnel in special education settings can be more likely to be appropriately qualified to provide education and support to students with SEN. Finally, in special education settings, students interact with peers who have similar challenges; this can be a positive aspect in promoting feelings of inclusion and acceptance in the classroom. On the other hand, special education settings can lower academic expectations of students with SEN and the lack of integration with students without SEN increases the risks of stigma and lack of societal inclusion in school and later in life. Moreover, special education settings are understood to be more costly, and transition to mainstream schools from special settings can entail academic and socio-emotional challenges for some students.

School choice and student selection policies

School-choice policies and programmes have expanded in scope and size in most of the education systems with available data since the 1980s, though with wide variation across countries with regard to their form (OECD, 2019[199]). Arguments in favour of school choice policies and programmes include the idea that they may increase student engagement by enabling students to attend schools that more closely match their needs and preferences (Vaughn and Witko, 2013[200]). Similarly, school choice might improve the alignment between the educational vision of a specific school and the beliefs and identity of a student and his/her family. Competition between schools has also been recognised as, in theory, having the potential to improve the educational outcomes for all students by increasing accessibility and the overall quality of education (OECD, 2015[201]; Cerna et al., 2019[36]). From an equity point of view, greater choice may allow socio-economically disadvantaged students to be liberated from residence constraints by being able to choose schools outside their own (often disadvantaged) neighbourhood (European Commission/EACEA/Eurydice, 2020[172]; Musset, 2012[202]). In this way, it may, at least in theory, allow more disadvantaged children access high-quality schools.

However, not all students are able to equally benefit from the ability to choose the school they wish to attend. Research evidence shows that, when presented with the option of choosing a school, not all parents and students choose actively, and those who do so tend to belong to advantaged families who have greater access to information on the options available. Choice only slightly increases opportunities for students who face financial, residence, transport and information constraints (Cornelisz, 2017[203]; Echazarra and Radinger, 2019[204]). For example, school choice may be very limited or non-existent for students living in remote areas, where there is one school or alternative schools are far away, in bigger settlements. Similarly, students living in severe socio-economic conditions may not have the resources – time or financial – to choose to study outside their local neighbourhood (European Commission/EACEA/Eurydice, 2020[172]). Evidence also indicates that parents from a lower-income background prefer schools that are close to where they live (Allen, 2007[205]; Reay and Ball, 1997[206]).

In fact, in the absence of proper regulation, school choice can increase school stratification based on students' ability, socio-economic status and ethnicity (Ladd and Fiske, 2001[207]; Levin, 2009[208]), as has been demonstrated in empirical research of a number of countries including Finland (Berisha and Seppänen, 2016[209]; Bernelius, Huilla and Lobato, 2021[210]) and Sweden (Arreman, 2014[211]; Holm,

2013[212]). Parents' perception of schools is affected by their location and socio-economic composition, with parent and student behaviour revealing a preference for choosing schools which have peers from socio-economically similar or from a more advantaged background (than the neighbourhood school peers) (Butler and van Zanten, 2006[213]; Rowe and Lubienski, 2016[214]; Wouters, Hermann and Haelermans, 2018[215]). This can lead to a smaller social mix in schools, a tendency that can significantly weaken societal ties (OECD, 2022[216]). In Finland, for instance, some of the most disadvantaged catchment areas in Helsinki have witnessed the "flight" or "avoidance" of native Finnish families (Bernelius and Vilkama, 2019[217]). Research findings show that increased mobility, mainly on a municipal and, in some cases, regional level, facilitated by a voucher system allowing movement between schools, led to increased segregation between immigrant and native students (UNESCO, 2021[218]; Kornhall and Bender, 2019[219]). For example, there is evidence from Sweden that many native students change schools when the proportion of immigrant students in their school reaches a certain level (Yang Hansen and Gustafsson, 2016[220]). Furthermore, researchers found the existence of so-called "tipping points", where native Swedes will leave a neighbourhood or school after the minority or migrant population exceeds a certain percentage (Neuman, 2015[221]; Cerna et al., 2019[36]).

In this way, free school choice can foster sorting by ability (Seppánen, 2003[222]; Söderström and Uusitalo, 2010[223]) and socio-economic background (OECD, 2016[224]; Boeskens, 2016[225]). Available evidence suggests that selective admission and substantial add-on tuition fees in particular are likely to exacerbate social segregation and can undermine schools' incentives to compete on the basis of educational quality (Boeskens, 2016[225]). Furthermore, greater choice can lead to performance gaps within schools. Evidence suggests that one of the explanations for this phenomenon is the fact that schools in countries such as Finland are increasingly grouping students by ability and interest in "special emphasis classes" (e.g., music, foreign languages). Admission criteria used to select students into these "special emphasis classes" tends to privilege those from the most advantaged backgrounds. Research also suggests that ability grouping can harm the performance of those placed in lower tracks, which is particularly worrying given that they tend to belong to more disadvantaged groups and already experience greater barriers in and outside of education (OECD, 2020[165]; OECD, 2022[216]).

Other aspects of selection can also lead to increased segregation. For example, the first-come-first-serve principle can lead to increased segregation in schools as native parents, unlike newly immigrated parents, can place their children in a school's queue many years in advance to guarantee placement in the best schools (Cerna et al., 2019[36]). Segregation can also occur at the school-level when schools try to circumvent mandated school choice practices by advertising predominately to certain favoured groups, such as high-achieving students, as well as when schools are built in areas that are typically homogenous and high-achieving (Böhlmark, Holmlund and Lindahl, 2015[226]).

In addition, for publicly-funded private schools, school choice might induce high-achieving and advantaged students to leave the public sector, thereby exacerbating the stratification of students with respect to their socio-economic background and ability. As a result, funding private education might deplete the public sector of vital resources (Boeskens, 2016[225]).

A 2019 OECD report suggests that the impact of school-choice policies is ambiguous (OECD, 2019[199]). The impact of school choice policies, including their sorting effects, is influenced by several factors. These include school funding and any financial incentives to support school choice; the regulations in force; and the support services available to schools (Ladd, 2002[227]; Levin, 2009[208]). For example, choice policies that support disadvantaged and low-performing students (such as certain controlled choice and incentive schemes, which are discussed below in the section on Designing and managing school choice programmes to mitigate negative equity impacts) can enhance equity (Hanushek and Luque, 2003[228]). In addition, the impact of school choice is also largely influenced by associated policies such as the existence of private schools or the availability of different types of public schools. Other significant factors are the information available to parents on school supply, the conditions and procedures involved in choosing a

school, as well as policies determining whether and how schools may select students (European Commission/EACEA/Eurydice, 2020[172]).

Once the specificities of the school system are taken into account, estimates suggest that, within a country/economy, relaxed residence-based admissions regulations are related to an increase in social segregation across schools. However, this does not mean that strict residence-based regulations should be favoured since such regulations can create additional residential segregation and thus reinforce school segregation in the long term. Nonetheless, without some constraints in place, relaxing residence-based regulations may result in greater sorting of students by both ability and socio-economic status (OECD, 2019[199]).

The effect of school choice on student sorting is important because school composition (in particular, 'peer effect'[5]) has an impact on educational performance (Gibbons, Machin and Silva, 2006[229]). Empirical data in PISA 2018 (OECD, 2019[230]) illustrates that in education systems where schools are less socially diverse, the link between students' educational performance and their socio-economic status is stronger. Less diversity in schools tends to favour advantaged students, as less social diversity appears to correlate slightly with better performance for advantaged students and weaker performance for disadvantaged ones (OECD, 2019[199]). In addition, PISA 2015, as well as other academic research, indicates that creaming off high-ability and socio-economically advantaged students has a particularly negative effect on the performance of students in disadvantaged schools (European Commission/EACEA/Eurydice, 2020[172]; OECD, 2019[199]).

Designing and managing school choice programmes to mitigate negative equity impacts

There are several ways in which choice programmes can be designed and managed to limit their negative impacts on equity. Introducing controlled-choice schemes can combine parental choice and ensure a more diverse distribution of students. These schemes commonly allow parents to report several school preferences to a central enrolment point, which public authorities then try to respect as much as possible while maintaining a balanced distribution of students (OECD, 2012[163]). In addition, to ensure balance, introducing incentives for schools to make disadvantaged students attractive to high-quality schools, school selection mechanisms, and vouchers or tax credits can be alternative options. Policies are also required to improve disadvantaged families' access to information about schools and to support them in making informed choices (ibid.). For example, studies from Sweden show that immigrant parents face difficulties in utilising school choice to their child's benefit due to lack of language skills and reduced social and professional networks (Böhlmark, Holmlund and Lindahl, 2015[226]). These sorts of barriers can be overcome to some extent by ensuring that information on school choice policies is translated into the languages of major migrant groups (as well as those of ethnic minorities). This is currently being done in cities like Barcelona (Spain), Helsinki (Finland) and Oslo (Norway). Beyond providing information, it is also crucial to ensure that immigrant families understand fully the education system, for example the differences that start at upper-secondary level between general and vocational streams, and the implications of these choices for children's' future educational and career options. To this end, parents in countries such as the Netherlands have been invited to visit schools and meet teaching staff and school leaders (see Box 2.8).

Box 2.8. Examples from the Netherlands for active school choice

At the local level in the Netherlands, Knowledge-centres for Mixed Schools (*Kenniscentrum Gemengde Scholen*) seek to promote quality immigrant education through reducing segregation. The centres share the common practice of creating manuals on fostering diverse school environments. The knowledge centre in Rotterdam has also attempted to change preferences and misconceptions of foreigners through local tours organised by municipalities which allows parents to visit local schools. Considering many parents reported that they felt more comfortable touring schools in groups, this intervention is especially important for migrant parents who are navigating the system for the first time. After the tour has finished, parents and the facilitator discuss the pros and cons of each of the schools and explain the school choice process (Walraven, 2013[231]). Overall, this programme allows immigrant parents to learn about the schools in their area and make informed decisions for their children (European Commission, 2017[232]).

At the community level, some native Dutch families are engaging in self-organised initiatives with the aim of desegregating schools. Some communities, for instance, are providing awareness education for non-immigrants parents to disarm stigmatisation and fears of integration measures influencing their children negatively (Bunar, 2017[233]). Native Dutch families have also been grouping together and enrolling their children in schools that perform well and that have a high population of students from disadvantaged and/or minority backgrounds, to reduce segregation while ensuring their child is not the only native Dutch student in the classroom (Walraven, 2013[231]). In addition, these parents and communities interact with their local schools about curriculum, differentiation for students and after-school programmes so as to make the learning environment effective for all students. Involvement at the community level could often be an effective measure in reducing segregation; “grassroots participation drives the movement. No matter how strong, appealing, or sensible an idea may be, it needs people to think about it, talk about it, and act upon it if a movement is to advance its goals of changing society” (Van Til and Eschweiler, 2008[234]). Parents in the Netherlands have created approximately 90 parent groups that use school choice as an effective means to desegregate schools and provide a quality education for all (Walraven, 2013[231]).

Source: Cerna et at, (2019[36]), Strength through Diversity Spotlight for Sweden, OECD EDU Working Paper No. 194, https://dx.doi.org/10.1787/059ce467-en.

Boeskens (2016[225]) demonstrates that the regulation of publicly-funded private schools can make an important contribution to the equity and effectiveness of school choice programmes. Key areas for regulation include selective admission procedures (which gives private schools an incentive to compete on exclusiveness rather than their value-add, and can increase inequality and stratification); tuition fees (which can allow private schools to “cream-skim” students from the public sector and increase educational inequalities); and for-profit ownership.

School zoning or catchment areas have considerable potential to achieve balanced school enrolment (see examples in Box 2.9). Available studies show that socially heterogeneous zones can favour equity in students’ distribution (Saporito, 2017[235]). For this to be achieved, it is crucial that interest groups be prevented from gerrymandering catchment areas (i.e., manipulating the boundaries of the zones to favour themselves). International evidence highlights the need for various factors (such as school location and education demand) to be taken into account when establishing school zones to avoid the concentration of socio-economically disadvantaged students (OECD, 2022[216]).

Box 2.9. Building heterogeneous school zones

Catalonia (Spain)

Several municipalities in Catalonia (Spain), including the municipality of Terrassa, have reformed their school zoning systems to achieve more balanced enrolment, with a focus on integrating students with special education needs and from immigrant backgrounds. As part of recent changes, public and charter schools have been merged into the same zoning system. Moreover, to establish increased social heterogeneity within zones, municipalities are adjusting the traditional models of pairing schools and neighbourhoods. Within each zone, an 'exceptional' area is set up along its border. Families in these zones are allowed greater flexibility, and can choose to enrol their children in schools within its school zone, or neighbouring areas. This strategy is meant to resolve any challenges that might arise from these reforms, and to ensure that the new catchment areas do not undermine the principle of proximity (Bonal, 2019[236]).

Zürich (Switzerland)

Researchers from the University of Zürich modelled each block of the city of Zürich according to the share of non-German speaking householders and the share of households in which both parents attained upper-secondary qualification at most. They called this measure the "concentration index" (K-index). After, the researchers reconstituted the catchment area of 77 of the city's primary schools, block by block. As was to be expected, an almost perfect correlation between the concentration index of a school's surroundings and that of a school's catchment area was found. In other words, school segregation reflected existing segregation.

The researchers then developed an algorithm to reduce school segregation levels. The algorithm developed by researchers runs like a board game. At each turn, a school swaps up to four blocks with neighbouring schools, provided the exchange brings the concentration index of that school closer to the city average without harming a more segregated school. When no school can proceed to such an exchange anymore, the process stops. In applying the algorithm, the researchers proposed new catchment areas for Zürich's primary schools. At first sight, the map would change little. Indeed, for schools that are in remote areas little would change. But for others, in denser neighbourhoods, the changes that would come from using this new map would be remarkable.

In one of the most segregated schools, the algorithm could bring the K-index from over 70% to 44% (still 16 percentage points over the city average). Overall, applying the algorithm to Zürich's catchment area could bring the number of students attending schools where the K-index was 15 percentage points above or below the city-wide average from 2 600 to 2 100 (from a total of about 7 000 students) (Algorithm Watch, 2019[237])

Source: OECD (2022[216]), Finland's Right to Learn Programme: Achieving equity and quality in education, OECD Education Policy Perspective No. 61, https://doi.org/10.1787/65eff23e-en.

Besides building heterogeneous school zones, rethinking how students are assigned to schools could also reduce the negative effects of school choice. In systems where parents have a degree of choice, two main admission mechanisms apply. The "Boston mechanism" is a very popular student-placement procedure, which is applied for instance in several cities in the United States, in most Spanish regions, and until 2008 by many local education authorities (LEAs) in the United Kingdom (Terrier, Pathak and Ren, 2021[238]). Under this mechanism, students submit their preferred lists of schools to the local or central authority. The system of allocation follows an algorithm that tries to match as many students as possible with their stated preferences for schools. Students are sorted based on the criteria included in school admission

regulations. Seats of each school are allocated to students based on their ranking of preference, until there are no remaining seats (Abdulkadiroğlu et al., 2005[239]).

The second main assignment mechanism found in systems where parents have a degree of choice is called "deferred acceptance". This mechanism is currently used by LEAs in the United Kingdom and for accessing upper-secondary education in cities like Paris (France), Chicago, Boston (United States) as well as countries such as Finland and Türkiye. With this mechanism, the system also ranks students' preferences, but unlike the Boston mechanism, students are not automatically rejected if they apply to a school with no free capacity. A student can still have access to a school of their second or third preference if another student who has been previously tentatively accepted at the same school has lower priority. In this case, the initial acceptance of a student with lowest priority is revoked, even if they ranked the school as their first preference (Mennle and Seuken, 2017[240]).

The second approach may potentially reduce the negative impact of choice strategies on school segregation (OECD, 2022[216]). The Boston mechanism allows space for strategic behaviour, as families may not always choose the most desired schools but those for which they assume a higher likelihood to be admitted. However, in the deferred acceptance approach, there is no room for strategic behaviour and, therefore, families may reveal their true preferences.

Another policy option that may permit parental choice without exacerbating segregation is to introduce pro-diversity criteria to the allocation of students across the set of local schools available. Different forms of "controlled choice" have been used to reduce high levels of student segregation, for example by reserving a given number or share of places in oversubscribed schools to students from different socio-demographic backgrounds to maintain a balanced distribution of students (OECD, 2019[199]). The use of lottery systems to assign places in oversubscribed schools or formulae aimed to maintain a diverse student composition can also be considered (Musset, 2012[202]). Centralised procedures to match students to schools usually rely on a set of criteria (Abdulkadiroğlu and Sönmez, 2003[241]) that may include socio-economic status. Engaging school communities in defining these criteria and allowing for local variation can ensure that they are sensitive to local contexts; it can also significantly ease implementation of the criteria. Given their complexity, controlled-choice systems may require a certain degree of centralisation in order to minimise administrative costs and avoid problems, like multiple registrations (OECD, 2018[155]).

Some governments have also implemented compensatory financing mechanisms to mitigate the potential negative effects of school choice and public funding of private schools, particularly segregation and social stratification. For example, Chile, the Flemish Community of Belgium and the Netherlands have instituted weighted student-funding schemes, whereby funding follows the student on a per-student basis, and the amount provided depends on the socio-economic status and education needs of each student. These schemes target disadvantaged students and, in doing so, make these students more attractive to schools competing for enrolment (OECD, 2019[199]) (see also Chapter 3).

Pointers for policy development

This chapter reviewed country responses for the governance and design of equity and inclusion in education in light of available research and evidence. Based on the analysis developed in this chapter, this section provides a range of policy options that have the potential to foster equitable and inclusive governance frameworks across OECD countries. These pointers for policy development are drawn from the experiences reported in country-specific work, the Strength through Diversity Policy Survey 2022 and the available research literature.

Develop policy frameworks that promote equity and inclusion in education

Education systems differ in whether and how they pursue goals and in how they formulate targets for promoting equity and inclusion. Many education systems have adopted legislation and/or other regulatory measures related to equity and inclusion in education, which vary in terms of the extent to which they relate to promoting the learning and well-being of all students, or are rather targeted to address specific groups who are at risk of exclusion in education, most commonly students with SEN. However, there are also examples of frameworks addressing the need to support all learners in several OECD education systems.

Equity and inclusion are overarching principles that should guide all educational policies, plans and practices, rather than being the focus of a separate policy. Ensuring that all learners have access to quality education also acknowledges the value of diversity and respect for human dignity. The principles of inclusion and equity are not only about ensuring access to education, but also about having quality learning spaces and pedagogies that enable students to thrive, to understand their realities, and to work for a more just society (UNESCO, 2017[15]). Establishing policy frameworks for promoting equity and inclusion in education is crucial. This would require engaging other sectors, such as health, social welfare and child protection services to ensure a common administrative and legislative framework for equitable and inclusive education.

Countries could also develop an intersectional policy framework to highlight that different aspects of individuals' identities are not independent of each other. Instead, they interact to create unique identities and experiences, which cannot be understood by analysing each dimension separately or in isolation from their social and historical contexts (Bowleg, 2012[112]). These intersecting identities have consequences for policy responses. Policy frameworks can help policy makers to assess systematically interventions and processes for their effectiveness in mitigating intersectional issues.

Designate clear responsibilities for equity and inclusion and promote stronger horizontal and vertical co-ordination

A wide range of institutions have responsibility for governing the education system in such a way as to promote equity and inclusion. These include education authorities both at the national level (e.g., ministry of education and dedicated units within it) and at the sub-national level (e.g., states, regions, municipalities). Most countries govern equity and inclusion in education by combining central direction (either at the national or sub-national level) over policy development and standard setting with some measure of devolved responsibility for the implementation of policies impacting on equity and inclusion at the local and school levels. However, it is important that responsibilities for equity and inclusion are clear and well coordinated in order to avoid overlap of responsibilities or lack of action.

In addition to vertical co-ordination (central to local levels), responsibilities for delivering equitable and inclusive education need to be shared horizontally among government departments or government and non-government actors. Equity and inclusion in education are not only the responsibility of the ministry of education, but require co-operation with other ministries (such as health and social welfare). Nonetheless, sharing of responsibility does not necessarily mean greater collaboration and co-operation. Therefore, countries could implement integrated service delivery that encourages collaboration across social services.

Engage meaningfully all relevant stakeholders from the start and throughout the policy cycle

Stakeholders play an important role in shaping and implementing policies to promote equity and inclusion in education based on a shared understanding of the concepts. They can include teacher unions, employers' organisations, representatives of parents and students, organisations representing specific groups and organisations whose mission is to provide support to these groups. All relevant stakeholders for equitable and inclusive education should be engaged meaningfully from the start and throughout the

policy cycle. This requires involving a broad representation of stakeholders and developing their capacity for engagement. While different forms of stakeholder engagement range from communication, consultation, participation, representation, consultation to co-creation, it is important to strive for higher level of engagement such as partnerships and co-creation. These latter forms of engagement can provide the necessary mechanisms to implement equitable and inclusive policies in schools and allow stakeholders to own the process of change.

It is important to engage stakeholders throughout the whole policy cycle so they can be consulted at every stage and can build partnerships over time. Stakeholders need to collaborate and build partnerships within the system (from early childhood to adult education), across sectors (e.g., reaching out to health and social services), across government levels (from central to local) and between government and non-state institutions (UNESCO, 2020[16]). This type of engagement will ensure that equity and inclusion are prioritised from policy design to the implementation of laws and policies.

Design equitable and inclusive curricula and offer curricular flexibility to enable all learners achieve their potential

Curriculum is the central means for enacting the principles of inclusion and equity within an education. An equity approach to curriculum development recognises that adaptations may be required to ensure that diverse learners are offered the necessary opportunities to learn so that all students have the ability to achieve the knowledge and skills to participate in society (OECD, 2020[23]; OECD, 2021[18]). These may include, for instance, extra-curricular remedial learning for those falling behind, to ensure that such students are able to develop the targeted knowledge and skills, mother-tongue tuition for immigrant students, or specific support to ensure the engagement of gifted students.

Unlike the equity-centred approach to curriculum development, an inclusive curriculum does not assume the same standards for all learners, but respects and values their unique needs, talents, aspirations and expectations. It strives to ensure that all students are part of the shared learning experiences of the classroom and to create learning environments where broader societal and education goals of inclusion are celebrated. Developing an inclusive curriculum should involve broadening the definition of learning used by teachers and education policy makers, beyond its narrow conception as the mere acquisition of knowledge presented by a teacher to one that actively involves students and enables them to take the lead in making sense of their experiences. To develop inclusive curricula, policy makers may draw on design principles, such as flexibility, student choice, engagement, teacher agency and student agency (OECD, 2021[18]).

It is also important to offer curriculum flexibility in order to enable schools and teachers to make local decisions about the curriculum. It can create space for innovation and allow schools to develop local solutions for local problems in ways that are responsive to students' particular needs. Since curricular flexibility can inadvertently have negative impacts on students' performance and perpetuate or increase existing gaps between students, it matters how curriculum flexibility is used. Education systems should combine adaptive instruction and enriched activities that give students targeted opportunities to develop their potential. Investing in teaching and capacity-building is crucial in order to avoid regional and local variations in how curriculum flexibility is used.

Coordinate diversified education offerings and create flexible study pathways

Countries establish study programmes, disciplinary subjects, and study pathways at the primary and secondary level to deliver the curriculum and realise students' learning objectives. The diversity of such educational offerings has considerable impact on the extent to which education systems are able to accommodate the whole spectrum of students' abilities, interests and backgrounds and grant equal educational opportunities to all. These can include an adjusted curriculum, additional language courses or

preparatory classes for different groups of students. Furthermore, study pathways are important at both primary and secondary levels, and can influence students' access to the tertiary level and their transition to labour markets. They have to respond to the needs of students and the labour market through flexible combination of vocational and academic choices and be equivalent and consistent in quality (OECD, 2012[163]).

The co-ordination of education services across levels, sectors and programmes is crucial to reap the benefits of a diversified offer, to ensure students' smooth progression throughout compulsory and upper-secondary education and to employ educational resources efficiently. Both vertical and horizontal co-ordination are important, spanning from students' transitions across levels of education to students' transition across parallel pathways, respectively (OECD, 2018[155]). Countries employ a variety of types of differentiation which can take place between schools or programmes (such as general, vocational and modular tracks; and school selectivity) and within schools (such as ability grouping in classes and ability grouping in different classes). These differentiations can have an important impact on equity. Therefore, it is important that transitions between tracks and study pathways are flexible.

As previously suggested by the OECD (2012[163]), the negative effects of early tracking, academic selectivity and grouping by ability could be lessened by limiting the number of subjects or duration of ability grouping, increasing opportunities to change tracks or classrooms and providing high curricular standards for students in the different tracks. Providing alternatives to early tracking could also be helpful, for example by moving to greater integration in the provision of general, accelerated, pre-vocational and vocational tracks into the same lower and upper-secondary schools (OECD, 2018[155]).

Students coming from different backgrounds have distinct access to information and education opportunities. Moreover, certain groups of students might be less likely to choose or be guided towards certain subject choices or classes that lead to more academically-oriented pathways. Having a transition system which takes into account these differences and provide students with individual guidance could ensure a fairer transition to upper-secondary education and beyond (Perico E Santos, Forthcoming[242]). Education and career guidance counsellors play an important role in enabling students to make better-informed choices and also provide continuing support (OECD, 2018[120]) (see also Chapter 5).

Ensure that learning environments are engaging and responsive to the needs of a diverse student population

Education systems provide a variety of learning settings to support students, ranging from dedicated schools, dedicated classes, regular classes with indirect support, regular classes with resource support, integrated classes to withdrawal classes. While inclusion of all students in mainstream schools might be the desired outcome, providing specialised learning settings can, in some instances, be an effective strategy for responding to the needs of diverse students.

The Strength through Diversity Policy Survey 2022 showed that learning settings are most often tailored to meet the needs of students with SEN, students with an immigrant background and socio-economically disadvantaged students. However, it is important that learning environments are tailored to the needs of all learners and are designed appropriately to be welcoming and engaging. Learning environments should aim for positive learning outcomes, provide students with a sense of well-being and community and offer frequent opportunities for interaction. Learning environments need to encompass classrooms, play spaces and the entire school. Teachers, school leaders and non-teaching staff play an important role in any learning environment and hence require effective training and professional learning to support learners (see also Chapter 4).

Regulate carefully school choice to counter potential segregation

Many countries face the challenge of balancing aspirations for greater flexibility and parents' freedom to choose their child's school with the need to ensure equity in their school systems (OECD, 2019[199]). School choice can result in segregating students by ability, income and ethnic background and in greater inequities across education systems. Therefore, school choice schemes should include mechanisms that mitigate the negative effects on equity and that can lead to more segregation. In particular, the design of choice schemes should consider a number of mechanisms (OECD, 2012[163]). These include introducing controlled-choice programmes with equity considerations to ensure a more diverse distribution of students and avoid selecting only the best students in oversubscribed schools. Furthermore, it is important that disadvantaged students are attractive to high-quality schools. This can include the provision of financial incentives to schools to enrol low-performing and disadvantaged students, attention to selection mechanisms that schools can employ (criteria for admission, time of registration, additional fees), and providing vouchers or tax credits to make high-quality schools affordable for students from disadvantaged families (ibid.). In addition, raising awareness, improving disadvantaged families' access to information about schools and supporting them to make better-informed choices are also crucial.

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Notes

[1] "Priorities" could have been understood by respondents as both standing objectives as well as temporary priorities.

[2] Opportunities to learn generally refers to the input of schooling that researchers recognise as necessary and predictive of successful learning. This is highly relevant in examining learning gaps among groups of students and identifying education factors that may be responsible for increasing equity gaps. Variations exist in how to operationalise and measure opportunities to learn. Existing research conceptualises the key variables of this construct as being related to the amount of instruction time, the curriculum content and the quality of instruction as key elements of the enacted curriculum that are predictive of academic learning (Kurz, 2011[243]; OECD, 2021[18]; Stevens, 1996[246]). In PISA 2012 (OECD, 2013[244]), for instance, opportunities to learn in relation to mathematics literacy was operationalised through three indices that measure students' degree of exposure to three kinds of curriculum content: word problems, formal mathematics topics and applied mathematics problems (OECD, 2021[18]).

[3] Nonetheless, the terms adaptations and accommodations are often used interchangeably.

[4] At the regional level, the right to education is also provided for in the Additional Protocol to the American Convention on Human Rights in the Area of Economic, Social and Cultural Rights (article 13) (United Nations Office of the High Commissioner for Human Rights, n.d.[248]) and in the European Convention for the Protection of Human Rights and Fundamental Freedoms (article 2) (Council of Europe, 2013[247]).

[5] 'Peer effects' refer to externalities in which peers' backgrounds, behaviours, actions or outcomes affect an individual outcome. Examples of peer effects could include classmates' high achievement motivating the particular student to work harder, a student learning directly from their peers, and a student developing an interest in a particular sport on the basis of their classmates having that interest (Sacerdote, 2011[245]).

3 Resourcing education systems to foster equity and inclusion

This chapter examines the resourcing of education systems to foster equity and inclusion in education systems. Specifically, it discusses the role of main allocation mechanisms and targeted distribution of resources in supporting equity and inclusion goals, and how countries can best leverage them to this end. Then, it discusses in greater depth the different forms of targeted resources that can be employed by education systems to support a diverse student population, reflecting on the different goals and uses of financial resources, in-kind service provisions, physical resources and human resources. The chapter ends by highlighting policy pointers for embedding equity and inclusion goals in the resourcing of education systems.

Introduction

A variety of contextual elements highlight the importance of resourcing in education systems, and of ensuring that such resources are used effectively and serve the groups that need resources the most. While the COVID-19 pandemic (discussed more in Chapter 1) spurred short-term education budget increases (e.g., due to the need to acquire materials, digital devices, etc.) for a number of education systems, at the peak of the crisis for various countries, there is concern that education spending may decline in the coming years (World Bank Group, 2020[1]), as happened after the financial crisis of 2007-2008. Following this crisis, the total average expenditure on educational institutions as a percentage of GDP fell for most countries with available data between 2010 and 2016, mainly as a result of a lower increase in spending compared to GDP (OECD, 2019[2]). According to the Council of Europe (2017[3]), this disproportionately affected those most in need of support, due to, for instance, reductions in specialist staff for students with special education needs (SEN) and in programmes to foster the cultural and linguistic integration of immigrant students, cuts in pre-school programmes and scholarships, and the termination of projects to reduce school dropout rates. There is concern that education spending may decline in the coming years, which may impede the provision of additional support to students needed to address both learning losses and the psychological effects of the pandemic (World Bank Group, 2020[1]). Funding will also be necessary to ensure that the pandemic's impact does not fall disproportionately on the most marginalised students (ibid.).

Education systems have also faced and/or are facing the costs associated with the needs of increasing numbers of refugee students. Refugee students' needs are diverse and wide-ranging, spanning from language learning to emotional support, and may necessitate the provision of targeted resources for specialist staff (such as teachers, cultural mediators) and additional materials and services (e.g., free meals, textbooks, etc.).

In addition, the rising inflation poses a significant challenge for many households around the globe. Higher prices can erode the value of real wages and savings, leaving households poorer. These effects are not felt equally, as low- and middle-income households tend to be more vulnerable to high inflation than wealthier households (Ha, Kose and Ohnsorge, 2019[4]). This has implications for education resourcing, both in terms of the potential support that socio-economically disadvantaged children may require and to address the risk of widening gaps between students.

These factors, along with the others discussed in Chapter 1, can be drivers of a significant need for education systems to use resources efficiently to maximise the impact of available funds. This implies ensuring an equitable and inclusive financing system so that funds can be used to address gaps and effectively support diverse student needs.

To tackle these topics, the chapter first introduces the role of main allocation mechanisms and targeted distribution of resources in supporting equity and inclusion goals, and the ways in which education systems can best leverage them. Then, it discusses more in depth the different forms of targeted resources that can be employed by education systems to support a diverse student population, reflecting on the different goals and uses of financial resources, in-kind service provisions, physical resources and human resources. The chapter ends by highlighting policy pointers for embedding equity and inclusion goals in the resourcing of education systems.

Why funding equitable and inclusive education is relevant

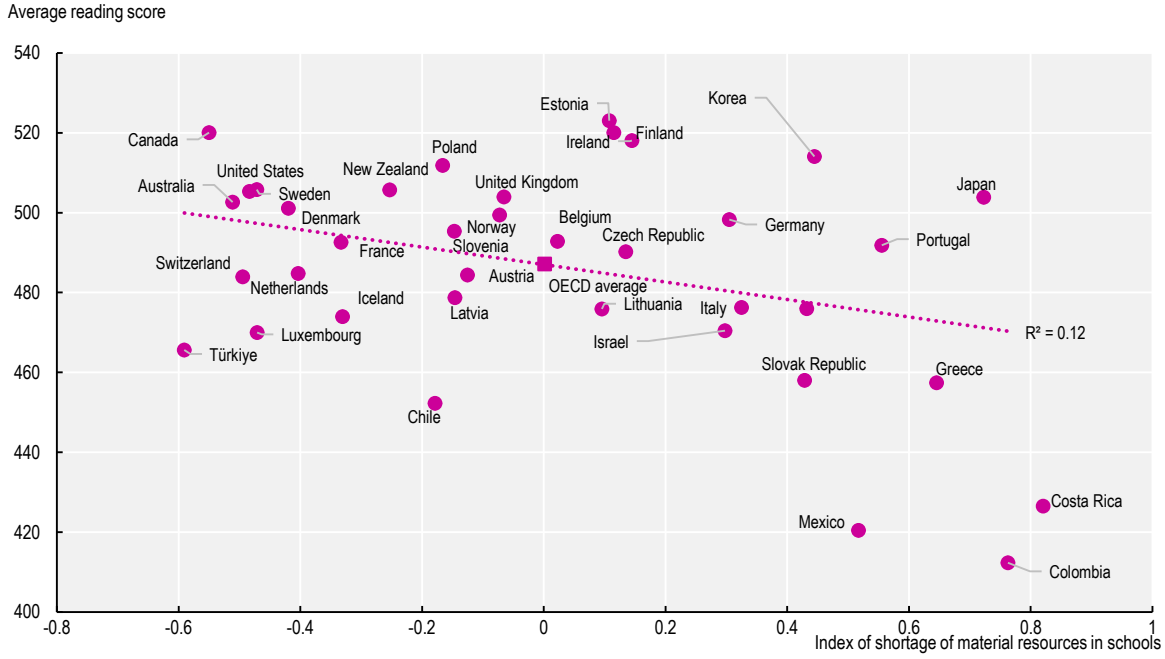
Since the middle of the 19th century worldwide, there has been a growing belief that schools exist to "level the playing field" of learning and opportunities for all students (Merry, 2020[5]). Based on this belief, the provision of more public school funding should lead to greater equity in education, which consequently should positively impact socio-economic inequalities (European Commission/EACEA/Eurydice, 2020[6]). However, while public spending on education can lower inequality, the current research literature suggests

that the relationship between funding levels and equity is not linear. In reviewing the literature, Eurydice (2020[6]) reports that, above a certain level of expenditure, an increase in funding does not necessarily improve student outcomes or equality of opportunities. There are several possible reasons for this. Increasing funding may not be enough if it does not offset structural features of education systems that impact equity and the inclusion of all students. Additional funding, where it is available, may also reach the schools or students that would benefit the most from it. Moreover, additional funding in education does not intervene on the drivers that lead to inequities in education, such as concentrations of socio-economic disadvantage and residential segregation. It is therefore relevant to consider how funding may be allocated equitably, and how to ensure it reaches those in need, in efforts to advance equity and inclusion in education.

An equitable distribution of material resources can influence student outcomes

The OECD PISA 2018 results indicate that countries and economies with fewer shortages of material resources generally show better academic outcomes (OECD, 2020[7]). As shown in Figure 3.1, differences in the index of shortage of material resources accounted for about 12% of the differences in mean reading performance across OECD countries in PISA 2018. Across all participating countries and economies, the index of shortage of material resources was negatively correlated to mean performance in reading, mathematics and science even after accounting for per capita GDP, which underlines that shortages in resources have a negative relationship with student outcomes (OECD, 2020[7]).

Figure 3.1. Shortage of material resources in schools and reading performance (PISA 2018)



Note: Positive values in this index indicate more shortages of quality material resources than on average across OECD countries; negative values indicate greater availability and quality of material resources than on average across OECD countries.
Source: OECD (2020[7]), PISA 2018 Results (Volume V): Effective Policies, Successful Schools, Figure V.5.10, https://dx.doi.org/10.1787/ca768d40-en.

Results from PISA 2018 further show that school systems where material resources were allocated equitably amongst socio-economically advantaged and disadvantaged schools – or, in some cases, where

disadvantaged schools have more material resources than advantaged schools – generally perform better in the assessment (OECD, 2020[7]). Indeed, across all participating countries and economies, the index of equity in the allocation of material resources is positively correlated with mean performance in reading, mathematics and science, even after accounting for per capita GDP (ibid.).

However, socio-economically disadvantaged schools are more likely than advantaged schools to experience shortages of material resources, on average across OECD countries (OECD, 2020[7]). Disparities in shortages of material resources are generally also observed between rural and urban schools (in 25 education systems participating in PISA, rural schools suffered from more shortages) and between public and private schools (in 39 education systems, public schools suffered from more shortages).

PISA also collects data on shortages of teaching personnel, as reported by principals (OECD, 2020[7]). Similarly to the previous discussion on material shortages, the results reveal that on average across OECD countries, a per one-unit increase in the index of shortage of education staff leads to a negative change in reading performance. Shortages of education staff generally affect more disadvantaged schools: in 42 countries and economies participating in PISA, shortages of education staff were more prevalent in socio-economically disadvantaged schools than advantaged schools, and in public schools than in private schools. Moreover, on average across OECD countries, shortages of education staff were more prevalent in rural schools than in urban schools. Analysing the components of the index of shortage of education staff separately shows that in most countries, a lack of education staff was more prevalent, according to school principals, than an inadequacy or poor qualifications of staff (OECD, 2020[7]).

The importance of financing equitable and inclusive education systems

Investing in fostering equity and inclusion in education is not only beneficial for students, but for society more broadly because of its returns in social, economic and political aspects (European Agency for Special Needs and Inclusive Education, 2016[8]). Indeed, groups that are disadvantaged in education generally fare less well later in life, which can translate into socio-economic losses from a societal perspective (Mezzanotte, 2022[9]). Better implementation of inclusive education can have positive outcomes (academic and socio-emotional) for all learners, not just learners with SEN or other diverse student groups exclusively (ibid.).

While inclusion is often misconceived of as being prohibitively expensive, impractical and/or unsustainable, the United Nations Department of Economic and Social Affairs, the Office of the United Nations High Commissioner for Human Rights and the Inter-Parliamentary Union (2007[10]) argue that inclusive education systems tend to be less expensive than segregated models. The administration and management costs will most likely be lower in a single, integrated system that includes all learners than in systems with segregated settings for specific learners. Transport, too, is generally less expensive, since segregated settings are usually attended by individuals from a larger geographical area (UN-DESA, OHCHR, IPU, 2007[10]). Similarly, UNESCO (2020[11]) has highlighted that, while shifting to an inclusive education system should not be viewed as a cost-cutting exercise *per se*, investments towards an inclusive education system are an effective use of funds, as they reduce the redundancies and high costs associated with running parallel systems, which may happen in contexts that offer segregated or separate settings for diverse students. Indeed, there exists a general understanding, notably in literature concerning students with special education needs (SEN), that inclusive education systems cost less to implement and maintain than special education models (UNICEF, 2015[12]). While it is difficult to undertake a comprehensive cost-benefit analysis of inclusive education reforms, there is support for the view that advancing equity and inclusive education may be desirable from a financial sustainability perspective.

The design of the financing system also has an impact per se on the promotion of equitable and inclusive education (European Agency for Special Needs and Inclusive Education, 2016[8]). The way financing is determined in education systems' laws and regulations has consequences for decision making in relation to labelling and identification of learners, diagnostic and assessment procedures, the support available for

individual learners as well as the schools they attend, and the placement of learners in different types of settings (e.g., special classes) (Ebersold et al., 2019[13]). Thus, financing systems are considered fundamental in the debate on how policies for inclusive education can ensure the right to education for all learners.

Main allocation mechanisms: how regular funding can account for equity and inclusion goals

Education systems rely on a variety of types of resources, which are part of the overall funding provided to education (OECD, 2013[14]). These can be grouped into three categories (OECD, 2017[15]):

- **Financial transfers**: e.g., public funding of individual schools, transfers to different levels of school administration;
- **Human resources**: e.g., teachers, school leaders and education administrators;
- **Physical resources**: e.g., buildings and equipment.

These resource types are closely interlinked, as financial transfers may be used in funding human and physical resources. There is therefore often no clear-cut division or classification of certain resources.

The next section of this chapter introduces the topic of main allocation mechanisms (also defined as regular funding) and their uses for equity and inclusion, focusing mainly on financial transfers. Then, it focuses specifically on targeted allocation of resources to support diverse students, and discusses examples related to targeted financial transfers, physical resources and distribution of human resources. This chapter also considers the ways in which the different resourcing mechanisms can be used at different education levels: student level (when resources are given directly to students as with financial aid[1] at secondary level); teacher level (the management of the teaching workforce); school leader level (the management of school leadership); school level (e.g., programmes targeted at schools); and system and sub-system level (e.g., education administration). These all contribute to an equitable and inclusive distribution of resources within education systems and are systematically integrated and discussed throughout the chapter.

Mix and match: the role of different funding mixes to foster equity

While a minimum level of investment in education is important, what matters most for the equity and quality of education provision is how the funding is allocated to schools that are most in need of additional resources (OECD, 2017[15]). Socio-economically disadvantaged schools, and schools that host large populations of students with specific needs (e.g., students with an immigrant background), may need more resources than others in order to be able to effectively support their student population. For this reason, for instance, most European countries' central authorities allocate additional resources to schools that have additional funding needs (European Commission/EACEA/Eurydice, 2016[16]). However, it is not only the central level that can be in charge of equity funding: other educational authorities, which can be regional or local, can equally be responsible for allocating additional resources to support disadvantaged students (OECD, 2017[15]). Different levels of governance thus contribute to the state of equity of educational resourcing, and need to find means to respond to the specific needs of their target populations.

Having recognised varying needs across schools, governments can generally undertake two broad approaches for designing funding mechanisms: i) the inclusion of additional funding in the main allocation mechanisms for particular education providers or schools; and ii) the provision of targeted funding in one or a series of different grants external to the main allocation mechanism (OECD, 2017[15]). Typically, a mix of these funding mechanisms is found in many systems. Finland, for instance, adopts both these mechanisms: the central authority accounts for certain population characteristics when computing main

allocations to municipalities, while also providing additional grants to said local authorities (OECD, 2022[17]).

To take into consideration equity concerns, **main allocation mechanisms (or regular funding)** can be based on funding formulas that account for the needs of specific students, schools or areas when establishing the amount of funding to be received by local educational authorities or schools. This can be done by countries regardless of the allocation mechanisms of their choosing, meaning that it can be implemented via lump sum grants, earmarked funds, block grants[2] or other mechanisms. In Denmark and Norway, for instance, the initial transfer of a lump sum grant from the central government takes into consideration certain demographic characteristics. In Denmark, this refers to characteristics of the municipalities, including their socio-economic structure (Nusche et al., 2016[18]; Ministry of the Interior and Housing, n.d.[19]). In Norway, the general grant accounts for the number of students with an immigrant background in each municipality to equalise expenditures across them (Eurydice, 2021[20]). In Chile, the main block grant for general education is allocated with a funding formula that incorporates different weightings for students from socio-economically disadvantaged backgrounds, for schools in rural or highly isolated areas and for special educational provision (OECD, 2017[15]).

Targeted funding provides resources to be used by local authorities (e.g., municipalities) or schools for specific purposes, with the goal of ensuring responsiveness to emerging priorities and the identified needs of particular groups. Indeed, the use of targeted programmes can allow for better steering and monitoring of the use of public resources for equity purposes at the school level (OECD, 2017[15]). Targeted funding can thus be a useful tool for central authorities to address concerns over the equity in the distribution of funding. A large number of OECD countries leverage targeted funding and in-depth examples are discussed in the section on Targeted distribution of resources: targeted programmes and resources to support students.

One-size does not fit all: trade-offs between the use of main allocation mechanisms and targeted funding for fostering equity

Governments need to consider some challenges and trade-offs when designing an allocation mechanism for their education systems, so as to balance the advantages and disadvantages of main allocation mechanisms and targeted funds.

Targeted funding can foster responsiveness to priorities within the education system by resourcing specific programmes, students or activities. Indeed, funding can be earmarked for a given purpose and thus be used to promote specific policies or priorities, which can help central authorities foster greater equity and inclusion in their systems. For a specific goal, education systems can adopt a variety of targeted funding options, from the provision of extra funds to buy devices for disadvantaged students or schools; to the coverage of early childhood education and care (ECEC) fees for families from a disadvantaged socio-economic background; to the provision of additional personnel to schools or classes that have large numbers of students with SEN or with an immigrant background. More examples are discussed in the section on Targeted distribution of resources: targeted programmes and resources to support students. Fostering equity via main allocation mechanisms can help stabilise funding to education providers over time – and can in this way support long-term budget sustainability for schools, avoid overlap in repeated grants and applications, and reduce bureaucracy and inefficiencies. There are, therefore, arguments to avoid an ever-increasing number of targeted programmes and include adjustments for equity within the main funding allocation (OECD, 2021[21]). Education systems may need to take into account such considerations when designing their resourcing systems since no universally valid formula exists equity is accounted for in resource allocation.

Multiple targeted programmes can generate overlap, increased bureaucracy and limited long-term sustainability for educational authorities and schools

Relevant educational authorities (e.g., municipalities or other local authorities) or schools generally need to apply for apply for targeted funding distributed via grants. This implies an additional administrative and reporting burden for local entities, which leads to increased costs, in particular when the entity does not have the capacity or know-how to comply with the application or reporting requirements. In Finland, for instance, problems have been identified with grant-based targeted funding in both urban and remote geographical areas (Bernelius and Huilla, 2021[22]). The problems specifically concerned local authorities' applications for additional resources: some local actors had such limited capacity that they were not able to apply for additional funding (ibid.).

This issue can have large implications for a system's horizontal equity (see Chapter 1 for definition), as more well-off local authorities are more likely to apply for additional funding than less well-off authorities that might be, however, in a greater need of additional resources (OECD, 2022[17]). Overall, applying for additional funding and managing projects can be costly for municipalities: even for municipalities with the internal capacity to apply for grants, the process is time-consuming and can take away the attention from other important tasks.

Moreover, not all local authorities have sufficient capacity to implement sound budget planning and to manage their resources well (OECD, 2017[15]). Administering a funding system requires considerable technical skills and administrative capacity and many school systems find it challenging to ensure these are available at the level of each educational provider. Capacity constraints at the local level can exacerbate inequities between individual authorities, in particular in countries that have many municipalities with a small number of inhabitants. In some countries in particular, education providers are very small and responsible for only one or a few schools, which does not allow them to achieve the same extent of economies of scale, management capacity and support that can be offered by larger providers (ibid.). Small providers typically have a very limited number of staff managing school services, and these do not necessarily have expertise regarding the design of effective resource management strategies. Some OECD countries have thousands of municipalities involved in managing and funding their own schools, many of which have weak administrative capacity, which makes it difficult for them to maintain efficient school services (ibid.). Central authorities may thus not be able to oversee whether funds are allocated efficiently, if they have to rely heavily on local authorities' capacity.

Furthermore, from the central authority perspective, having a multitude of programmes can reduce the transparency of funding to schools and make the funding allocation complex and potentially inefficient due to the risk of duplication of efforts, a lack of co-ordination and greater administrative costs (OECD, 2017[15]). It also leads to transactions costs from the central authority side, which is required to process all the requests, establish successful recipients and monitor the coherence of the use of the funding with its purposes. Overall, having a large number of targeted programmes that serve a certain goal can lead to an overlap of the various grants, which can complicate the monitoring of the outcomes of such programmes and require increased efforts for the management of the programmes from both the central and local levels.

Moreover, the application process does not always align with the school-year cycle (OECD, 2022[17]). This implies that local authorities, schools and ECEC institutions may obtain the funds after the academic year already started, which affects their planning efforts. Furthermore, having to rely on additional targeted funding can also impact schools' financial sustainability, as it impairs their ability to commit to long-term investments.

Lastly, applications to grants do not guarantee that the request will be accepted by the central authorities, which implies that local education providers, schools and ECEC settings cannot count on these resources while planning their budgets and activities. This can be especially problematic for disadvantaged schools or municipalities that are dependent on these funds.

Targeting specific student groups while avoiding segregation and stigma

Systems vary in whether they target funding to specific geographical areas or to specific populations within schools (OECD, 2017[15]). While allocating funding to the specific population of a school can help to ensure that the funding reaches the target group, such approaches do not account for the additional challenges created by a high concentration of disadvantage in a particular region (ibid.). Area-based funding aims to address the additional negative effects that socio-economic disadvantage has when it is concentrated in a particular region (ibid.). However, this approach may leave out a proportion of the disadvantaged population in a system while including many individuals who are not disadvantaged. There is also evidence that the "target area" label can be stigmatising and encourage flight of middle-class families (ibid.). The stigmatisation of areas and schools was, for instance, one of the reasons the government of New Zealand decided to substitute its decile classification system,[3] under which funding was allocated to schools based on the proportion of their students living in disadvantaged socio-economic or poorer communities. An inquiry prepared for the Ministry of Education found that a school's decile had become a synonym for quality, with low decile schools being perceived by many as schools for those with no other choice (Vester, 2018[23]). Furthermore, despite the absence of ethnicity in the decile calculation, the "low decile" label was seen as marking ethnicity, thereby colouring community perceptions about schools (ibid.). The government decided to phase out the use of deciles and introduce the Equity Index,[4] both to counter the stigma attached to low decile schools and to update the computations of socio-economic disadvantage in schools (through expanding the number of variables to be considered) (New Zealand Ministry of Education, 2022[24]).

On the other hand, central authorities may design targeted funding based on specific student characteristics, such as, for instance, students' special education needs or their Indigenous background. This method can be chosen by education systems to ensure sufficient funding to meet the needs of marginalised or disadvantaged groups, and, if the funding is earmarked, that the funds are used by education providers specifically to support groups deemed as more in need. However, if the authority does not carefully design the characteristics and accompanying criteria, this approach can incur unintended consequences or inadvertently cause perverse incentives[5]. For instance, linking funding to the number of students with SEN could lead education providers to label or diagnose students more often (Ofsted, 2010[25]). There is evidence that this is the case when financing is directly linked to the number of students with a certain disorder, as in the case of Attention-Deficit/Hyperactivity Disorder (ADHD) (Morrill, 2018[26]) in a number of states of the United States (Bowers and Parrish, 2000[27]). Overall, international experience reveals the need to carefully consider risks that can emerge from different financial strategies (e.g., the stigmatising of certain groups) and how they can be avoided.

Furthermore, linking additional funding to students with specific characteristics can result in greater segregation. For instance, an education provider may receive additional funding due to the concentration of socio-economically disadvantaged students in some of its schools. If not provided with additional guidelines or requirements, the provider would be given little incentive to desegregate or support a more equal distribution of students across its schools. This can be counterbalanced by targets and goals that make municipalities accountable to use the funds to decrease the segregation of their students.

This risk also exists in relation to main allocation mechanisms. If regular funding accounts for student characteristics, it can better respond to their needs by providing additional funding. However, as with targeted grants, this may inadvertently lead education providers to over-diagnose students, or to choose not to focus on desegregating schools. To address or mitigate this risk, central authorities may need to adopt compensatory mechanisms, and be prepared to monitor and, if needed, address, the emergence of these unwanted effects. This could involve, for instance, redistributing student groups across different schools, or other mechanisms to counter the risk of increased segregation of the student groups targeted by the grants (OECD, 2022[17]).

Monitoring the ways in which schools and municipalities respond to the structure of the financing system

While application-based grants can enhance equity in the short-term by providing additional resources to schools that have larger numbers of disadvantaged or diverse students or to trial programmes or policies, in the medium- and long-term they can create perverse incentives for municipalities to adapt their spending based on these inputs (OECD, 2022[17]).

In a system in which main allocations towards local authorities fund most of costs of the education system, local entities responsible for education provision are likely to act in their best interest and aim to optimise the resources they are allocated. When designing resourcing systems, central authorities should anticipate municipalities' potential responses, in particular those that could be misaligned with or undermine the programme's goals. For example, if a grant were to be designed to support local authorities serving schools with a low level of resources, local authorities may further reduce the funding to certain schools to increase their chances of securing such funds. Likewise, if indicators on the immigrant population of an area were to be used as selection criteria for grant allocation, it is possible that municipalities would have less of an incentive to tackle the issue of segregation in the relative schools (as mentioned in the previous section). Box 3.1 provides an example from Norway and discusses the limitations in the effectiveness of targeted grants for specific purposes.

Box 3.1. Norway's experience with the limitations of additional grants

There is a large body of empirical literature that analyses the extent to which local authorities allocate targeted grants according to the intentions or recommendations of the funding authority. While preliminary findings in the area reported that additional grants were to a large extent spent as intended, recent empirical studies identify mixed effects on local authorities' spending (Brunner, Hyman and Ju, 2020[28]; Cascio, Gordon and Reber, 2013[29]; Hyman, 2017[30]). These studies suggest that this effect may be sensitive to the design and target of the grant, as well as to economic circumstances and institutional settings.

Reiling and colleagues (2021[31]) provided an analysis on the effectiveness of central government grants on local educational policy, based on a Norwegian programme. In 2015, Norway's central government provided a grant to the 100 municipalities with higher-than-average student-teacher ratios for grades 1–4 (ISCED 1). The additional resources aimed to strengthen early intervention and improve student learning, through the hiring of additional teaching staff. However, their research showed that, for the most part, Norwegian municipalities did not increase teacher density in primary schools, despite receiving extra grants for this specific purpose. Though they could not rule out that there was some take-up of the grant in terms of teacher hiring, their results exclude a full take-up of the policy.

Their conclusions suggest that stronger enforcement mechanisms may be necessary in order for targeted grants to be allocated as intended by the financing authority. However, this may be at the expense of local flexibility.

Source: Adapted from OECD (2022[17]), Finland's Right to Learn Programme: Achieving equity and quality in education, https://doi.org/10.1787/65eff23e-en; Reiling et al. (2021[31]), The effect of central government grants on local educational policy, European Journal of Political Economy, https://doi.org/10.1016/j.ejpoleco.2021.102006.

Another challenge for education systems is that education providers may allocate resources according to their own priorities, which may not match those of the central government. In relation to equity and inclusion, this could mean that education providers choose to use funding that was intended to support disadvantaged or marginalised students for other priorities. Indeed, in certain countries, even if central

authorities distribute funds by weighting the presence of disadvantaged students (or students belonging to another target group) across local education providers, there are no obligations for such providers to follow the same criteria in their own allocation of the funds. In Finland, for instance, the amount of funding each education provider is to receive through the main allocation mechanisms is determined by taking into account certain characteristics of the local population (such as citizens' disabilities, unemployment, foreign-language speaking population, concentration of immigrant population, bilingualism, insularity, remoteness, Sámi population, etc.) (OECD, 2022[17]). However, local authorities are free to allocate and use these funds as they deem appropriate (ibid.). Similarly, in Sweden, each municipality decides how resources will be allocated between schools (OECD, 2017[32]). The school then has the responsibility of allocating the resources in a way that best serves the needs of students, but, as there is no general model for resource allocation, municipalities may not always have the knowledge or capabilities to allocate funding effectively. National evidence shows that only a limited number of municipalities reallocate resources to schools with low-performing or socio-economically disadvantaged students (ibid.). This suggests a need for accountability measures or monitoring mechanisms that ensure that local authorities provide enough funding for target groups.

It is therefore important that funding design be accompanied by strong monitoring and evaluation processes. Particularly in a context where schools have large discretion over the use of equity funding, accountability at the school level on educational provision for different student needs and their impact on learning play a keys role. Funding mechanisms need to manage the tension between giving education providers flexibility to use their judgment and accountability to maintain public confidence that equity funds will in fact be used for the benefit of target groups.

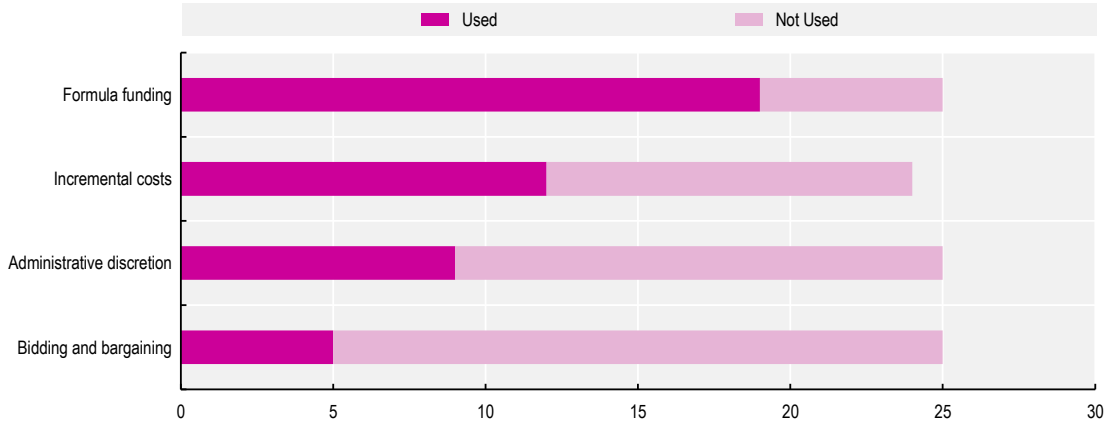
Funding formulas: a complex instrument

Funding formulas – i.e., mathematical formulas that contain some variables (e.g., student numbers) to which a cash amount is attached in order to determine school budgets – are not a recent tool in education policy (Fazekas, 2012[33]). They have been around since the late 1960s and 1970s, and their use widened during the 1990s, with the adoption by countries such as the United Kingdom, the Netherlands and New Zealand along with a radical decentralisation of the schooling system (ibid.). Since then, formula funding has been applied in many different forms and in several OECD countries.

The OECD (2017[15]) has found that well-designed funding formulas are an effective means to distribute funding in a transparent and efficient way, while also playing a critical role in aligning the distribution of resources with priorities such as fostering equity (by including weights to distribute additional funds to particular categories of students). Indeed, one of the most important functions of a funding formula is to promote equity by ensuring that similar funding levels are allocated to similar types of provision (horizontal equity) and that differential amounts can be added to the basic allocation according to the assessed degree of educational need (vertical equity) (Fazekas, 2012[33]; OECD, 2017[15]).

Recent data show that, among OECD countries, funding formulas are the most commonly used basis for allocating general public funding to public primary and lower secondary educational institutions (OECD, 2021[34]), as shown in Figure 3.2.

Figure 3.2. Basis used to allocate general funding to public primary educational institutions, by category of funding (2019)



Note: General funding includes funds not allocated for particular kinds of expenditure or where it is not possible to disaggregate information by category of expenditure.
The bases used to allocate funding are ranked in descending order of the number of countries using them.
Source: Adapted from OECD (2021[34]), Education at a Glance 2021: OECD Indicators, Figure D6.1., https://doi.org/10.1787/b35a14e5-en.

The OECD (2021[34]) reports that in 31 OECD and partner countries and economies with available information, equity criteria used in funding the different categories of expenditure tend to relate to the characteristics of one of three groups:

- the population of the locality (state/region/province/municipality): e.g., the number or proportion of people who belong to disadvantaged communities, ethnic minorities or who have an immigrant background;
- the schools: e.g., with special subject offerings (i.e., minority language) or in remote or high-cost locations/regions, or serving disadvantaged communities; or
- the students: e.g., the number or proportion of students with an immigrant background, with SEN, or with a low socio-economic background.

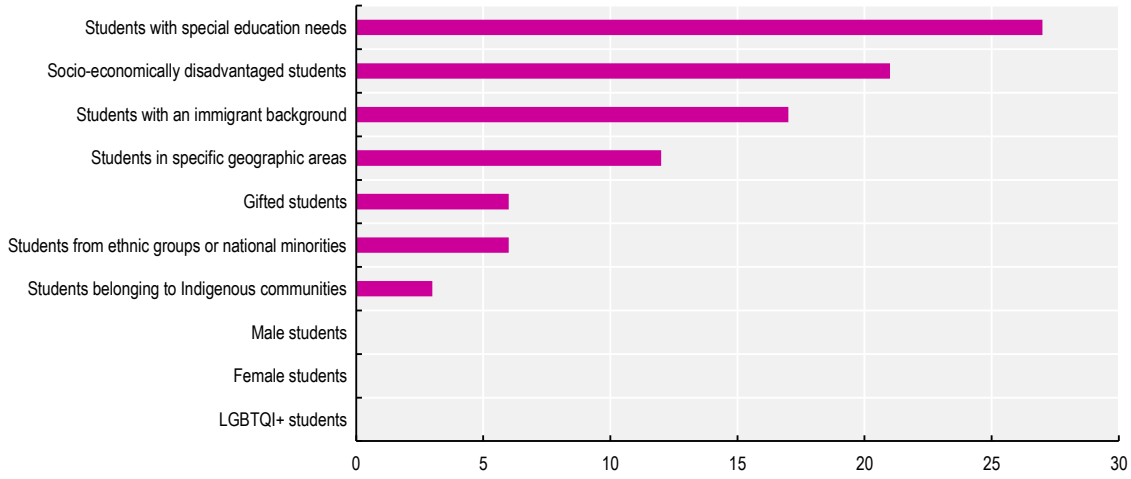
Of the 26 countries and economies with available data on the allocation of funding by central and state governments, 25 use at least one criterion related to student characteristics, 23 use at least one criterion based on school characteristics and 14 use at least one criterion based on population characteristics (OECD, 2021[34]). Often, the criteria are used in combination.

The OECD has previously analysed the different criteria included in funding formulas for different typologies of expenses for a variety of resource needs: the criteria can be based on individual student needs, the provision of a specialised curriculum or specific school characteristics (OECD, 2017[15]).[6]

The OECD (2021[34]) has reported that, among the multiple equity criteria used in funding methodologies, the most commonly adopted relate to student characteristics, and in particular to socio-economic status or SEN.[7] The extent to which education systems account for these and other student characteristics in their funding methodologies was also considered by the Strength through Diversity Policy Survey 2022. As shown in (Figure 3.3), students with SEN were the group most frequently accounted for (27 education systems), followed by socio-economically disadvantaged students (21 systems). Other groups that were often taken into consideration are students with an immigrant background (17 systems) and from specific geographic areas (12 systems). The breakdown in Annex Table 3.A.1 shows that all education systems (excluding Luxembourg) that reported using a funding formula noted that they account for the number of students with SEN in their formula design. The breakdown further shows that all education systems that

use formulas, besides Japan, reported employing a mix of student characteristics criteria. On average, systems reported including three student-level criteria included in their funding formulas. The education systems that reported including the largest number of student-level criteria were Northern Ireland (United Kingdom) and the United States, who both reported accounting for six characteristics: students with an immigrant background; students from ethnic groups or national minorities; students belonging to Indigenous communities; students with SEN; socio-economically disadvantaged students and students in specific geographic areas. No education system reported accounting for the number of LGBTQI+, or female or male students separately.

Figure 3.3. Groups of students accounted for in the funding formulas (ISCED 2)



Note: This figure is based on answers to the question "Are any of the following groups of students accounted for in the funding formulas in your education jurisdiction at ISCED 2 level?". Thirty-two education systems responded to this question. Response options were not mutually exclusive.
Options selected have been ranked in descending order of the number of education systems.
Source: OECD (2022[35]), Strength through Diversity Policy Survey 2022.

StatLink https://stat.link/zyd2ct

Student-based approaches to funding may be adopted to serve various goals. According to research (Chambers, Levin and Shambaugh, 2010[36]), some local districts in the United States have implemented such an approach to decentralise control on resources to schools and hold them accountable for student outcomes, while others have done so to increase equity in resourcing and make the funding system more transparent (Cooper et al., 2006[37]; Ucelli et al., 2002[38]). Designing the funding system to match specific needs of students in schools is intended to create a more equitable distribution of resources and provide greater resources to those students most in need (see, for example (Miles and Roza, 2006[39]; Roza et al., 2004[40]; Thomas B. Fordham Foundation, 2006[41])).

In order to adopt a student-based funding system within a funding formula, coefficients should adequately reflect different per student costs of providing education. However, estimating the costs involved in providing education to different students is a major challenge (OECD, 2017[15]). Different programmes and types of educational provision will also entail different costs (e.g., for specialised equipment, a specialised curriculum offer such as a recognised language minority). Coefficients can also be used to assist schools and districts facing particular challenges due to their demographics or geography. Some countries apply different coefficients to account for the variable costs of different types of schools or programmes (Connecticut School Finance Project, 2016[42]).

There is no universal rule that countries can adopt to design their funding formula and select the relative weights to ensure equitable results of their education systems. Every country needs to evaluate the variation in its own costs of providing education and choose where or on whom they want to concentrate the funding. The categories to be included in a given formula should be based on a formalised process of stakeholder engagement and data analysis to determine the particular learning needs of students in the country. Generally, four main components should be the building blocks of a formula, each relating to a main purpose for allocating funds to schools (Levacic and Ross, 1999[43]; OECD, 2017[15]):

- a basic allocation, setting a fixed amount per student or per class;
- an allocation for students with supplementary educational needs, aiming to adjust for different student characteristics, which plays a major role in supporting the equity function;
- an allocation for specific needs related to school location, aiming to adjust for structural differences (e.g., rural areas with smaller schools and classes);
- an allocation for curriculum enhancement, adjusting for the costs of providing a specific educational profile and would only apply to selected schools or students.

An effective weighted-student funding formula will contain weights that allocate sufficient resources to students who require greater resources to learn and achieve at a similar level to their peers (Connecticut School Finance Project, 2016[42]).

Financing private education: impacts on equity

It is insufficient to consider how education systems provide funding, and whether they focus support for disadvantaged or diverse students in mainstream education or in specialised settings to assess risks of inequities in a system. Other factors can affect the equity of system, including the financing of private schooling (OECD, Forthcoming[44]).

A significant research finding is that the family-background effect on equity is larger in countries with a larger share of private funding (Schütz, Ursprung and Wößmann, 2008[45]). Eurydice (2020[46]) argues that this can happen for several reasons. For example, higher levels of private funding can signify that more students attend private schools, that there are more private schools, that private schools are on average more expensive or that parents have, or choose, to invest more in other forms of private education. In any case, they sustain, a higher share of private funding is likely to be negatively correlated with equity in education, given that the capacity to invest in private education is unequally distributed in society (Eurydice, 2020[46]). In summary, parents with a higher socio-economic status are in a better financial position and/or more willing to spend part of their income on the education of their children than parents from a disadvantaged socio-economic background. Private schools, indeed, tend to serve the richest strata of a population (UNESCO, 2021[47]). In Chile, for instance, one in two children attends a private primary school, but 87% of these students belong to the more advantaged households. Consequently, a relatively high ratio of private to public expenditure on school education may correlate with a relatively low level of equity in education (Eurydice, 2020[46]).

The conditions that private schools must fulfil in order to qualify for public funding are also key for the effectiveness and equity of an education system. In particular, their role in school choice (read more in Chapter 2) has to be considered (OECD, 2017[15]). Private schools' ability to select students and charge add-on tuition fees are particularly salient concerns for several OECD countries. Allowing subsidised schools to select their students based on performance, aptitude tests or socio-economic background raises a number of concerns pertaining to both equity and educational quality (ibid.). Selective admission permits private schools to "cream skim" high-ability students from the public sector, particularly where their public counterparts are required to operate on the basis of open enrolment or confine themselves to using non-academic criteria such as residential proximity to select students. Selectivity threatens to exacerbate student segregation between the public and private sectors and can widen existing achievement gaps.

This process threatens to deprive the public school system of high-ability students, which is likely to harm those who are left behind and deplete public schools of vital resources since disadvantaged students may have greater resource needs (Boeskens, 2016[48]).

School choice systems that permit private schools to demand significant parental contributions above and beyond the amount covered by the public subsidy risk exacerbating socio-economic segregation across schools. For this reason, a variety of countries that subsidise private providers place restrictions on their ability to charge "add-on" tuition fees (OECD, 2017[15]). In Sweden, for example, tuition fees among subsidised private schools are entirely prohibited, whereas countries such as Denmark provide fee-charging private schools with a proportionately lower amount of public funding (Houlberg, 2016[49]). The conditions under which private schools are eligible for public subsidies influence the ways in which school choice programmes affect accessibility, quality and equity of the school system. To mitigate risks to equity, education systems should establish common regulations on tuition and admission policies for all publicly funded providers and then monitor compliance.

As mentioned, tuition fees for publicly funded private schools, in particular, if not covered by vouchers, constitute a barrier to the exercise of school choice and can contribute to the socio-economic segregation of students between the public and private sectors. To ensure that vouchers and other forms of public funding increase the accessibility of private schooling options, some countries implement regulations to prevent subsidised private schools from charging fees that could constitute a barrier to entry (OECD, 2017[15]). A further element to consider is monitoring the effect of parental contributions to private providers on equity, when such contributions are meant to make up for discrepancies between funding of public and private providers. Indeed, any negative effect should trigger a careful consideration of the measure and an evaluation of how to address it through the modification of public subsidies.

Targeted distribution of resources: targeted programmes and resources to support students

Allocating targeted resources towards specific student groups can be a tool to foster equity and inclusion in education systems, as discussed beforehand. This section provides examples of how OECD education systems use different targeted resources to support both equity and inclusion in schools.

Additional resources for specific student groups or priorities

General school funding can be supplemented by additional resourcing that allows educational authorities to address specific needs or goals (OECD, 2012[50]). This includes not only general financial transfers for equity and inclusion purposes, but also group specific funding.

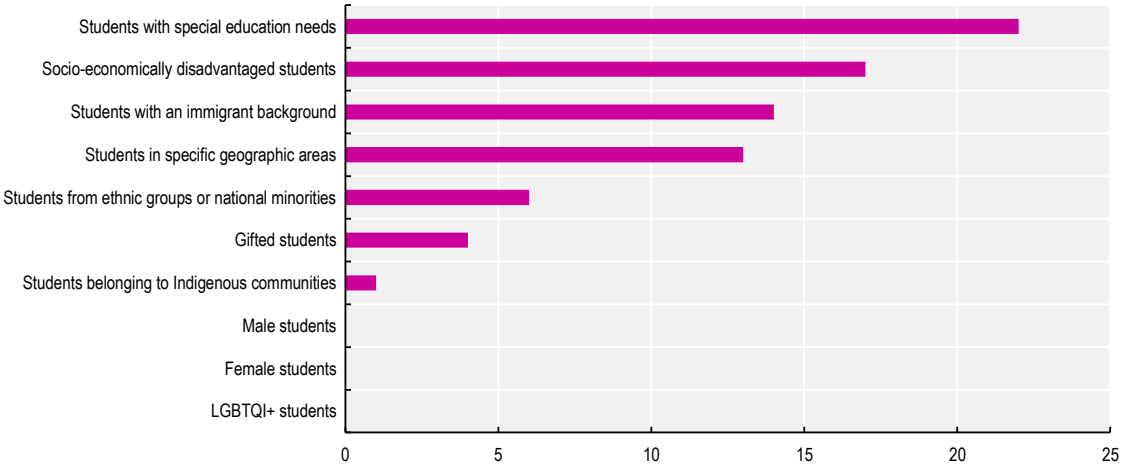
An overview of financial transfers for targeted funding for equity and inclusion

The Strength through Diversity Policy Survey 2022 asked education systems whether they provided additional resources to schools based on the enrolment of students with specific characteristics. As shown in Figure 3.4, the majority of education systems who responded to the survey reported providing additional resources to schools on the basis of the enrolment of specific student groups.

Most education systems that responded to the Survey reported providing resources based on the enrolment of students with SEN (22 education systems) and from socio-economically disadvantaged backgrounds (17). Fourteen education systems also reported providing funding in relation to students with an immigrant background and 13 in relation to specific geographic areas. No education systems reported providing additional resources based on the enrolment of LGBTQI+, male and female students.

Figure 3.4. Provision of additional resources to schools based on student groups' enrolment

Number of education systems where schools received additional resources based on the enrolment of students from the following groups in the previous school year (ISCED 2)



Note: This figure is based on answers to the question "In the previous school year, did schools receive additional resources based on the enrolment of students from any of the following groups at ISCED 2 level?". Thirty-one education systems responded to this question. Response options were not mutually exclusive.
Options selected have been ranked in descending order of the number of education systems.
Source: OECD (2022[35]), Strength through Diversity Policy Survey 2022.

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Additional targeted resourcing for these groups can take different forms. The next sections discuss specific typologies of targeted resources, from targeted programmes such as cash transfers, to school meals and provision of educational materials. All these resources can be provided to specific student groups or universally to all students.

Besides specific targeted resourcing, education systems often provide grants that are broader in scope, where recipients can decide how to allocate such funds to foster equity and inclusion. For instance, in 2020, the Ministry of Education and Culture in Finland announced a special state grant for the development of learning support and inclusion in pre-primary and primary education (Finnish Ministry of Education and Culture, 2020[51]). This grant was meant to support activities of inclusion in schools, via the hiring of a person to coordinate and plan support activities, or fund trainings in this area, etc.

Funding that fosters equity and inclusion in education can take different shapes, targeting different goals. Certain funding is provided specifically to foster equity and inclusion. In Scotland (United Kingdom), for instance, the Ministry established the "Pupil Equity Funding" under the Attainment Scotland Fund - a targeted initiative focused on closing the attainment gap between the most and least disadvantaged children. The Pupil Equity Funding is additional funding allocated directly to schools and is provided to over 97% of Scottish schools to support pupils from low-income families (Education Scotland, 2022[52]). Funding programmes that counter issues such as segregation, violence or lack of safety in schools can also contribute to improving the equity and inclusion of education systems. In Sweden, for instance, the Government engaged in various measures to combat sexual harassment and abuse, in particular by promoting sexual education in schools. To this end, the Swedish National Agency for Education invested in 2018 SEK 50 million (around EUR 48 million) for this purpose. Some of the funding targeted activities to develop sex education and to provide in-service training for school staff in sex education and against abusive behaviour (Government Offices of Sweden, 2019[53]). In the same year, Sweden developed an

additional grant to improve equality and knowledge development in compulsory education, to be allocated with on the basis of a socio-economic index. This initiative was meant to increase equality by supporting more disadvantaged students and indirectly foster gender equality: as boys generally perform worse than girls in school, this investment was meant to help reduce this gender gap.

This grant from Sweden is an example of measures that have an intersectional focus. Indeed, grants are at times designed to target students that meet multiple criteria. This is the case in a variety of countries that aim to support gifted students that come from a socio-economically disadvantaged background. In the United Kingdom, for example, the "Excellence in Cities" policy initiative targeted schools in disadvantaged, mostly urban, areas. Under one of its three strands, the programme allocated funds to these schools specifically for a gifted and talented programme (Machin, McNally and Meghir, 2010[54]).

Some countries do not adopt a categorical approach towards student groups in their education systems, as mentioned in Chapter 1. However, these systems still provide targeted funding based on an assessment of student need for additional resources to support their learning. Portugal is an example of a system that provides additional funding based on student needs for support without categorising students into specific groups (OECD, 2022[55]). Besides general funding devoted to the implementation of universal support measures[8], the country provides:

- Funding devoted to selective support measures: this funding provides adaptive and intensified support allocated to schools for groups of students at risk of failure who may need additional help.
- Funding dedicated to additional support measures: these are resources allocated to individual students in need of intensive additional support. The support is specialised and individualised and responds to specific needs.

These resources are meant to support equity and inclusion in the country, and are often complemented by European funds, mainly dedicated to human resources and managed by the European Commission (OECD, 2022[55]). The examples discussed throughout the rest of the chapter provide further information on how specific resource typologies can be leveraged to foster equity and inclusion of diverse student groups.

Funding for special education needs: a long-standing commitment

Funding for students with SEN is a long-standing example of targeted funding to foster equity across OECD education systems, and highlights important challenges in the field of resourcing for equity and inclusion.

Historically, funding for special education needs has often been managed separately from funding for general education, with the goal of ensuring the appropriate coverage of the needs of students with SEN (Sigafoos et al., 2010[56]). There are, however, systems in which funding for students with SEN is included within the main funding mechanism. In England (United Kingdom), for instance, funding for SEN is not allocated as a separate amount per student, but is part of the overall Dedicated Schools Grant allocated to each local authority to fund their schools' budgets (Long and Danechi, 2022[57]). Local authorities, in consultation with their schools' forums, determine the individual allocation to schools. As such, the Department for Education does not give funds directly to local authority-maintained schools. Funds for extra assistance with students with SEN come from schools' budgets and, if the extra cost is more than GBP 6 000 per year (around EUR 7 000) for an individual student, local authorities can provide top-up funding for the school. Local authorities can also give extra funding to schools with a disproportionate number of students with SEN (ibid.).

However, several education systems reported considering the enrolment of students with SEN as a criteria for the provision of targeted resources in the Strength through Diversity Policy Survey 2022 (Figure 3.4). Indeed, in various systems, additional resources allocated to education for students with SEN can be assigned to learners for personal factors related to their special education need, or can support schools by taking contextual requirements into account. Funding can therefore be directed towards different

targets, like individual learners, mainstream schools or special schools (European Agency for Special Needs and Inclusive Education, 2016[8]).

Funding mechanisms for SEN have been recognised as influencing school-level decision making regarding the identification of students with SEN (Ebersold et al., 2019[13]). Moreover, the way funding is provided can produce perverse incentives, leading to the placement of some students in separate educational settings such as special classes or special schools (Banks, 2021[58]; Slee, 2018[59]), as discussed previously in this chapter.

Building on the classification framework proposed by the European Agency for Development in Special Needs Education (2016[60]), Brussino (2020[61]) discussed three modes of classification of education systems' funding models for students with SEN, based on conditions for funding: input, throughput and output-based.

- *Input*: demand-driven model that puts emphasis on the demand for special education needs to be covered. Globally, it is the most common funding scheme to support students with SEN (UNICEF, 2012[62]). Ministries generally allocate funds for students with SEN at the national level based on a flat grant, weighted-student formula or census of total student population per region/municipality. Countries with small percentages of students with SEN enrolled in special settings can have a need-based funding approach for special schools, such as Austria (European Agency for Special Needs and Inclusive Education, 2016[60]).
- *Throughput*: supply-driven model that emphasises specific services provided instead of needs to be covered. It usually determines the number of students eligible for funding and decentralises the allocation and management of funds at sub-national levels. Some countries that employ such schemes are Denmark, Ireland, Greece and Sweden (ibid.). In turn, the allocation of funds from sub-national levels to school districts/individual schools can take different forms of financing schemes.
- *Output*: model focusing on the results achieved (European Agency for Special Needs and Inclusive Education, 2016[60]). In the output scheme, funds channelled to mainstream and special settings are based on students' learning outcomes. Resourcing is dependent on reaching previously set outcomes and/or parameters. The output model represents the least common financing scheme across OECD countries (Brussino, 2020[61]).

The advantages and disadvantages of these models are discussed in the literature (see Annex Table 3.A.2). There is some agreement that input funding, where individual students or their parents receive funding or resources based on a specific weighted category of disability, is based on the medical model of disability and is therefore problematic (Banks, 2021[58]). This type of support could, however, empower families as individual-driven funding can "guarantee" that students receive the resources they were assigned (Banks, Frawley and McCoy, 2015[63]; Parish and Bryant, 2015[64]). Moreover, with increases in the numbers of students with SEN in mainstream schooling, various stakeholders have expressed concerns in relation to this model and the risk of spiralling costs, the need to label and diagnose students, and the waiting time necessary to access support (Goldan, 2019[65]; Parish and Bryant, 2015[64]). Unlike the input scheme that directly requires the labelling of students with SEN and clear definitions of special education needs, the throughput model bases its conditions for funding on services provided, and not on the demand for SEN support (Brussino, 2020[61]). This model does not directly require labelling students with SEN and, consequently, can reduce the risks of over-identification and stigmatisation induced by labelling (Pijl, Meijer and Hegarty, 1997[66]). However, not directly linking conditions for funding with a demand-driven scheme can mean that schools may not always have sufficient financing to cover the needs of individual students with SEN (Meijer, 1999[67]).

Contrary to input and throughput schemes, the output model links results of the education system to the funding and directly promotes a set of valuable outcomes and results (Fletcher-Campbell, 2002[68]; Brussino, 2020[61]). This, however, entails the risk of not channelling resources where the need is higher,

as well-performing schools may receive most of the funding that lower-performing schools would need more (Meijer, 1999[67]). Output models might also enhance risks of competition among schools and the transfer of low-performing students to other schools (ibid.). Despite such general considerations, the advantages and disadvantages of output models may vary according to their specificities on conditions for funding, more precisely, on whether funding and/or funding premiums are based on outputs or progress achieved.

Given these considerations, education systems need to evaluate the advantages and disadvantages of all three systems when designing their own. Various systems currently adopt a mix of these mechanisms to fund the education of students with SEN (European Agency for Special Needs and Inclusive Education, 2016[60]).

A further challenge that education systems face relates to the fact that many countries continue to run a dual funding system of mainstream and special education, reporting increases in these expenses each year (Banks, 2021[58]; Graham and Sweller, 2011[69]; Jahnukainen, 2011[70]). Research, however, has started focusing on how to implement more inclusive funding systems, going beyond the duality of mainstream and special education. This led Banks (2021[58]) to identify some key elements that characterise funding systems as inclusive:

- They have a devolved funding structure which increases the level of school autonomy and level of responsibility for school leaders;
- Inclusive funding models tend to incorporate investment in school development or capacity building involving school leaders and management and teachers working with increased diversity. Investment is also made in the promotion of innovative teaching and learning strategies such as Universal Design for Learning or Multi-Tiered Systems of Support (as discussed in Chapter 5);
- Systems of accountability and transparency in how and why funding is allocated are important elements of inclusive funding mechanisms.

Targeted resourcing: how it translates into practice

As previously mentioned, education systems rely not only on financial transfers, but also on the allocation of human and physical resources. These resources are at times allocated through targeted funding to pursue specific targets. The next sections provide examples of the different forms of targeted funding provided by education systems, discussing the goals that these may have. Specifically, the following sections discuss the role of the following targeted resources:

- Financial transfers or in-kind service provisions (i.e., funding programmes targeted at particular groups or with specific policy objectives such as scholarships for disadvantaged students or programmes to improve school leadership);
- Physical resources (e.g., buildings, learning material, equipment);
- Human resources (e.g., teachers, school leaders and education administrators).

Financial transfers

The distribution of public funding for schooling can target particular school agents, such as students with an immigrant background, or specific policy priorities, such as providing scholarships for disadvantaged students or programmes to improve school leadership. In some countries, schools may receive a sizeable share of public funds through developmental programmes attached to particular policy objectives such as the introduction of innovative curricula, the enhancement of collaboration with the school community or better support for disadvantaged students (OECD, 2013[14]). Similarly, funding can also be directed to specific school agents through targeted funds. Examples include compensatory programmes for disadvantaged students (e.g., means-tested voucher systems, scholarships in upper secondary education

for students from low-income families) and performance-based reward schemes for teachers and school leaders. Such targeted programmes typically distribute funding on a differentiated basis (depending on the characteristics of the potential recipients); restrict eligibility to a subset of school agents, schools and sub-systems; and may be based on some form of competition among eligible recipients (e.g., application-based grants) (OECD, 2013[14]).

Targeted funding can take a variety of shapes when provided by central (or local) authorities. Funding programmes can be targeted at particular groups, such as students with an immigrant background, or have specific policy objectives such as providing scholarships for disadvantaged students or improve school leadership, train teaching staff for inclusion, etc. Given the range of goals that these programmes can serve, some of these resources come as monetary benefits (e.g., fee-exemptions or scholarships), while others are provided directly as services (e.g., meals or transportation) or materials (e.g., digital devices).

Cash transfers, subsidies and scholarships

A few education programmes target students and their families through exemptions (e.g., fees), cash transfers (e.g., scholarships) or in-kind services (e.g., transportation and school meals).

Cash transfers are quite common in low- and medium-income countries, and were pioneered in Latin America (UNESCO, 2021[71]). A few OECD countries have adopted them to support the most disadvantaged strata of their population. Colombia, for instance, developed the cash transfer programme *Más Familias en Acción* (More Families in Action), which is conditional on school attendance and health service use and had served 2.7 million low-income families as of 2015 (Medellín and Sánchez Prada, 2015[72]). The value of cash transfers that a family receives depends on several factors: the family's geographic location (municipality), the number and age of children and youth in the family, and the school grade they attend (ibid.). Another example comes from Türkiye, which has run a conditional cash transfer programme since 2003. An initial evaluation found positive effects on secondary school enrolment rate among 14-17 year-olds, especially in rural areas and for girls (Ahmed et al., 2006[73]; UNESCO, 2021[71]). The government later scaled up the programme and extended it in May 2017 to reach Syrian and other refugee children (UNESCO, 2021[71]).

Another example of monetary benefits are **subsidies.** There is, for instance, a widespread use of subsidies in education to support enrolment in ECEC. The cost of childcare has important implications for equity and inclusion, with high childcare costs being one of the factors contributing to inequalities in childcare use across income groups. Data from the OECD show that in European OECD countries, children under the age of three in low-income households are one-third less likely to participate in ECEC than those in high-income households (OECD, 2020[74]). Although support programmes are sometimes used to reduce the costs for low-income families, out-of-pocket costs often still equate to a large share of earnings for low-paid parents in some countries, which has important implications for equity. For this reason, various countries provide subsidies to specific groups that have historically had lower rates of enrolment in ECEC. Across Australia, for instance, states and territories subsidise access to ECEC and pre-school for Indigenous children. New South Wales subsidises early access to community pre-school for 3-year-old Aboriginal children and children from low-income families (Kral et al., 2021[75]); and the Northern Territory provides early access to pre-school for children living in remote areas (ibid.). Exemptions from fees are also provided for socio-economically disadvantaged students in some education systems. In the Slovak Republic, for instance, children from disadvantaged households are exempt from fees for all ECEC years (with the rest of the student population being exempt from fees from five years of age) (OECD, 2015[76]; Slovak Government, 2008[77]).

Subsidies can also be granted for access to specific programmes or schools. In Ireland, for example, students from designated disadvantaged schools who have been identified as gifted are granted subsidies to attend the fee-based Irish Centre for Talented Youth, in accordance with the Delivering Equality of Opportunity in School policy (Rutigliano and Quarshie, 2021[78]; Cross, Cross and O'Reilly, 2018[79]).

Scholarships are a further tool that education authorities can leverage to support specific student groups. Scholarships targeting secondary school students identified as gifted, for instance, exist in several OECD countries. For example, in Slovenia, intellectually and artistically gifted students can be awarded a Zois scholarship (*Zoisova štipendija*), which is financed by the state (Rutigliano and Quarshie, 2021[78]). Scholarships are also widely used at the tertiary level to support diverse student groups. For instance, various systems and organisations (e.g., specific universities) offer scholarships to women to study STEM (science, technology, engineering and mathematics) subjects at the tertiary level, as a tool to support gender equality in the field. The government of Alberta (Canada), for instance, provides "The Women in STEM Scholarship", which supports women pursuing careers in STEM fields where their gender is underrepresented, and who are working to advance gender equality in their chosen field (Government of Alberta, 2022[80]). Similarly, the Department of Industry, Science and Resources of the Australian Government has established a "Boosting the Next Generation of Women in STEM program" (Australian Government, 2022[81]). The programme will deliver up to 500 university scholarships to help women in STEM seek higher qualifications, re-enter the workforce and develop senior leadership skills (ibid.). The government of New Zealand, too, offers the "Government Communications Security Bureau Women in STEM Scholarship" to support girls in the field (New Zealand Government, 2022[82]). However, scholarships tend to be awarded on the basis of academic performance, which can have the effect of exacerbating inequality. For this reason, some countries have attempted to take socio-economic status into account (UNESCO, 2021[71]).

In-kind service provision

Besides programmes that provide cash benefits or subsidies to target disadvantaged students, other provisions for in-kind services exist. For example, school meals and transportation are some of the most widely adopted measures. Their provision (or lack of thereof) can have an impact on equity in education, as they often specifically target the most disadvantaged students.

School meals

Literature has provided evidence on the importance of nutrition for academic performance (Glewwe, Jacoby and King, 2001[83]; Winicki and Jemison, 2003[84]). As hunger and food insecurity affect children from more disadvantaged backgrounds, the provision of meals at school can help strengthen equity within education systems (Gordanier et al., 2020[85]). Research, as reported by Gordanier and colleagues (2020[85]), has found positive relationships between the availability of free meals and food security, that of free meals and nutrition, and generally with health outcomes. There is also some evidence that school breakfast programmes can improve academic performance (Frisvold, 2015[86]; Leos-Urbel et al., 2013[87]). The provision of nutritious school meals contributes to supporting student health, particularly for more socio-economically disadvantaged students, along with their emotional well-being and learning (Burns and Gottschalk, 2020[88]).

The reasons for education authorities to provide school meals (whether at a cost or for free) are therefore multiple: to improve academic outcomes of students, improve the nutrition of students by providing healthy food options, and support less advantaged families by reducing their food-related expenses, among others.

Across the OECD, different countries adopt vastly different school meal policies. According to a report developed for the European Commission, Estonia, Finland and Sweden serve school lunches to all students free of charge (Bruckmayer, Picken and Flemons, 2021[89]). France, Italy and Portugal subsidise the cost of meals provided at school according to household income. Hungary provides a "social catering programme" that targets low-income families, large families, or families raising children with disabilities. In addition, a few countries arrange some kind of provision during the holidays (Riding et al., 2021[90]). In France, recreational holiday centres – used by around two million children – provide lunch on similar financial conditions to school meals; in Portugal, school canteens remain open during certain holidays for

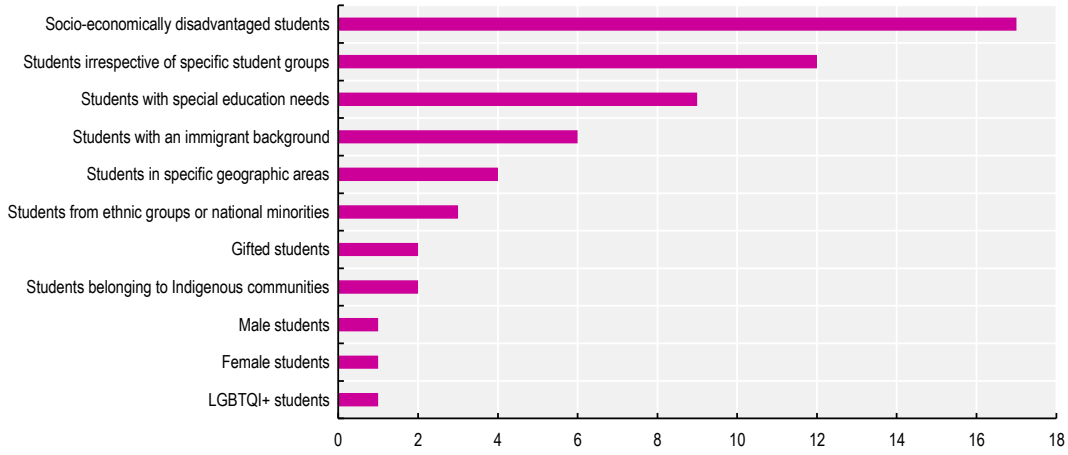
students who are beneficiaries of the school social programme; in Spain, public school canteens remain open during the first six weeks of the summer break period (Guio, Frazer and Marlier, 2021[91]).

During the height of the COVID-19 pandemic, ensuring that disadvantaged students had access to appropriate nutrition during the lockdowns was a core concern for various countries. In the United States, the Oakland Unified School District offered "grab and go" breakfast and lunch meals to the most vulnerable students, with support from foundations (Oakland Unified School District, 2022[92]; Eat. Learn. Play. Foundation, 2022[93]). In Spain, the legislation that established the COVID-19 emergency support measures stipulated that all families benefiting from a scholarship or a special support during the school year must receive economic support and direct services of food distribution (Head of State, 2020[94]).

Seventeen education systems who responded to the Strength through Diversity Policy Survey 2022 reported providing free or reduced-price school meals to students identified as being socio-economically disadvantaged (Figure 3.5). Twelve systems stated that they provide free or reduced-price meals to all students, irrespective of their groups. Nine systems also referred providing free or subsidised school meals to students with SEN and six on students with an immigrant background.

Figure 3.5. Free (or reduced-price) school meals

Number of education systems providing free or reduced-price school meals to specific student groups



Note: This figure is based on answers to the question "Does the policy framework include provision of any of the following non-instructional services for specific groups of students at ISCED 2 level? [Free (or reduced-price) school meals]". Thirty-two education systems responded to this question. Response options were not mutually exclusive.
Options selected have been ranked in descending order of the number of education systems.
Source: OECD (2022[35]), Strength through Diversity Policy Survey 2022.

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Some evidence suggests that free meals may not only have a positive impact on less advantaged students, but on all students. As mentioned before, Lundorg and colleagues (2021[95]) found positive effects of free meals on all students, although to varying degrees. Gordanier et al. (2020[85]), also evaluated a universal free-lunch programme on primary and lower secondary school students' academic performance and attendance in the state of South Carolina (United States). They found a positive effect on primary school students' mathematic scores, again with variations by student and school socio-economic status and locality. In particular, they found that students who were previously eligible for free lunches but not on other public assistance programmes benefited the most from this policy.

Expanding the provision of free school meals may also support disadvantaged students that do not qualify for free meals but do live in poverty. Eligibility rules, indeed, may still exclude a number of children in poverty from receiving free school meals (Patrick et al., 2021[96]). Studies on positive effects of free meals on test scores of students not previously eligible for free meals suggest that even students who are not certified as eligible for free or reduced-price meals may face budget or nutritional constraints (Schwartz and Rothbart, 2020[97]).

Another reason that can lead countries to offer universally free meals is an effort to dismantle the stigma around free meals recipients. Some studies have found that school-level stigma is associated with lower individual-level probability of participation in free meals programmes (Mirtcheva and Powell, 2009[98]). This can apply in particular to practices that identify low-income students who receive subsidised meals, such as separate lines in the school cafeteria or different types of meals. Observations of similar phenomena flagged a need for attention as to the potential discriminatory effects of competitive foods and to the issue of stigma around school meals (Bhatia, Jones and Reicker, 2011[99]). Schwartz and Rothbart (2020[97]), who used administrative data to evaluate the effects of universal free lunch on the performance of lower secondary students in New York City (United States), found that the universal free lunch increased participation in lunch for both students previously eligible for free lunch and those who were not.

Transportation

Travel to and from school is part of each student's life. It can, however, impose a burden on some students more than on others. There is also research, albeit limited, that suggests that school transportation may also have implications for academic success. A systematic review by Hopson et al. (2022[100]) synthesises research linking school transportation with academic outcomes. They found that longer travel times, and transportation challenges, were associated with adverse academic outcomes (except when the travel provided access to higher-quality schools). Their findings also point to some important implications for schools in rural and urban settings. Among rural students, longer commutes were associated with adverse outcomes, as were challenges in getting to school, such as long walks and extreme weather (Hopson et al., 2022[100]). Almost all of the studies they examined on rural districts found that travel time and transportation by bus had adverse relationships with academic outcomes. In urban areas, however, bus transportation was associated with positive outcomes more consistently, including when students were traveling long distances to attend a higher-quality school or a more racially integrated school (Banks and DiPasquale, 1970[101]; Hopson et al., 2022[100]). Longer distances were associated with more absences, especially when the routes had safety concerns, but not with grades or test scores. The authors thus found that, in urban contexts, longer distances may place students at greater risk of increased absences, but this risk may be outweighed by the benefit of being able to choose to attend a higher-performing school.

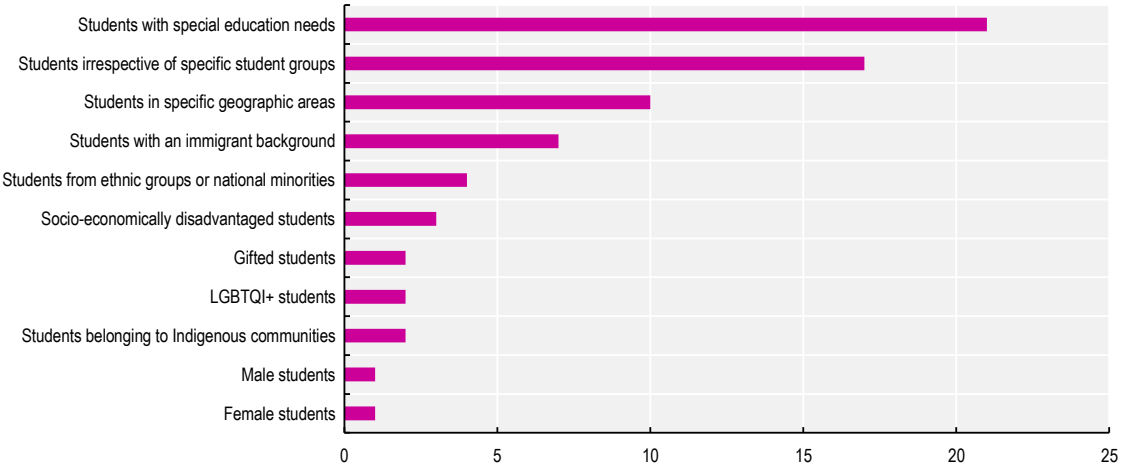
Beyond geographical factors, transportation needs are particularly salient for students with physical impairments, who are at an increased risk of injuries and fatalities in the event of an accident compared to their peers (Falkmer and Gregersen, 2001[102]; Graham et al., 2014[103]). Graham and colleagues (2014[103]) found that students with physical impairments and their families experienced various frustrations with transportation, including the lack of availability of suitable options and low reliability, timeliness and quality of services. Specific difficulties included equipment failures, uncomfortable situations that worsened their physical conditions and inconsistent scheduling. Furthermore, inadequate transportation to a destination and difficulty getting around settings were reported to limit participation in social and employment activities.

Transportation challenges therefore have the potential to further exacerbate risk factors that students face due to socio-economic status, ethnic discrimination and disability (Hopson et al., 2022[100]). The provision of programmes for transportation to and from school can thus play a key role in improving equity and inclusion in education. Key considerations in this respect are the safety and reliability of transportation services, along with strategies to reduce the potential negative effects of long commutes (which could include, for instance, amendments to routes to shorten bus rides and the provision of enriching activities to engage students during their commute).

Results from the Strength through Diversity Policy Survey 2022 show that various education systems provided transportation to and from school, through school buses or subsidised public transportation, as ways to support equity and inclusion. As Figure 3.6 shows, 21 education systems reported providing transportation for students with SEN. The Flemish Community of Belgium, for instance, provides free transportation services to students with SEN in both special and mainstream education (Flemish Ministry of Education and Training, n.d.[104]). Moreover, 17 education systems provided transportation irrespective of the group of students into consideration. This can be an important resource to support equity in education systems, by equalising the opportunity of students from different backgrounds to reach their school, irrespective of the barriers they may otherwise face.

Figure 3.6. Transportation to/from school (e.g., school buses, subsidised public transportation)

Number of education systems providing transportation



Note: This figure is based on answers to the question "Does the policy framework include provision of any of the following non-instructional services for specific groups of students at ISCED 2 level? [Transportation to/from school (e.g., school buses, subsidised public transportation)]". Thirty-two education systems responded to this question. Response options were not mutually exclusive.
Options selected have been ranked in descending order of the number of education systems.
Source: OECD (2022[35]), Strength through Diversity Policy Survey 2022.

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A number of education systems (10) stated that they provided transportation to students located in specific geographic areas, which is important to overcome potential barriers associated with long distances or other transportation difficulties. Students in pre-primary and basic[9] education in Finland, for instance, have the right to free school transport organised by the municipality if the school trip is more than five kilometres, or if the journey would otherwise be too difficult, strenuous or dangerous in light of the age or circumstances of the student (Finlex, 2022[105]). Seven education systems reported providing transportation services to students with an immigrant background in certain circumstances. The German-speaking Community of Belgium, for instance, organises transport for newcomer students who are attending language learning classes in a different primary school from the one in which they are enrolled, with funding approved for an academic year (MDG, 2019[106]; OECD, 2022[107]).

Physical resources: investing in infrastructure and providing learning materials

PISA defines as material resources both the physical infrastructure of a school and the educational materials available to teachers and students, and recognises their importance as components of a high-quality education (OECD, 2020[7]). Teachers need educational materials, such as textbooks, computers, library materials or laboratories, in order to provide instruction that is up-to-date, and that is challenging and responsive to students' needs (Murillo and Román, 2011[108]; OECD, 2020[7]). In addition, a school environment that is conducive to teaching and learning requires adequate physical infrastructure and facilities, such as buildings, grounds, heating and cooling systems, and lighting and acoustic systems (Conlin and Thompson, 2017[109]; Gunter and Shao, 2016[110]; Neilson and Zimmerman, 2014[111]). According to PISA, in order to make a difference to student learning, school infrastructure and educational materials need to meet at least three conditions. First, material resources need to be available where they are most needed and in sufficient quantity. Second, available material resources need to be of an appropriate quality and type to meet students' needs. Finally, material resources need to be used effectively. The availability and quality of instructional materials, in themselves, do not guarantee better learning; schools and teachers must be able to use these resources to enhance learning and teaching.

Infrastructural investments

Inaccessible and faulty designs can create physical and architectural barriers for students with impairments (and their families) and hamper accessibility to schools (Agarwal, 2020[112]). Physical school infrastructure accessibility has many components, both within and outside the school. The former includes, for example, signage, accessible entrances, corridors, toilets with grab bars, switches and controls, ramps, elevators, accessible desks, and playgrounds. The latter concerns the design of outdoor facilities like the roads, footpaths and transport needed to reach the school. For a school to be accessible, it must allow all children, teachers and parents to safely enter, use all the facilities including recreational areas, participate fully in all learning activities with as much autonomy as possible, as well as exit during emergencies (ibid.). Various countries are aware of limitations in the accessibility of their schools. In Italy, for instance, the *Istituto Nazionale di Statistica* (National Institute of Statistics) (2021[113]) reported that on average over the country, 32 schools out of every 100 are completely free from physical barriers, which means that less than one in three schools respects the country's criteria for full accessibility. Thus, investing in the infrastructure of school buildings and removing barriers is key to improve the accessibility and inclusivity of education systems. Without relevant support, students with physical impairments are at risk of experiencing low levels of academic well-being as well as deteriorating psychological and physical health (Brussino, 2020[61]). A report by the European Commission (2022[114]) based on a national (regional) mapping of European countries points out that "accessibility of facilities (to boost the inclusion of people with disabilities and special needs)" is one of the most common priorities and objectives set by Member States of the European Union (EU) in this area.

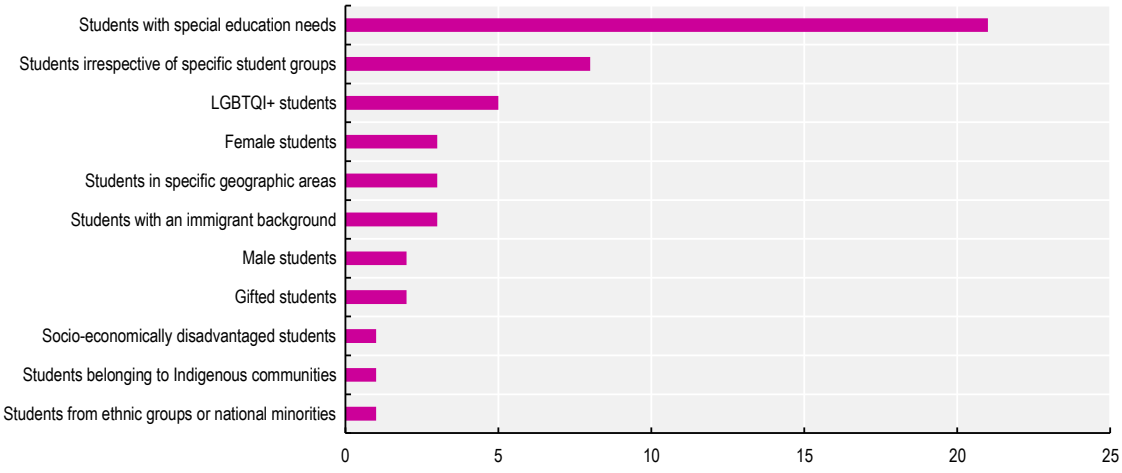
Many governments have taken steps to develop targeted grants to fund modifications to infrastructure and equipment that will improve access for students, staff or visitors with injuries or disability. For instance, schools in the State of Victoria (Canada) can apply to the "Accessible Buildings Programme" that is designed to support inclusive government school environments. Under this programme, schools are "assisted to make "reasonable adjustments" to school facilities for students and staff with a disability. This includes pre-existing disabilities, as well as disabilities that arise during enrolment (or employment) as a result of accident or deterioration of existing conditions" (Victoria State Government, 2019[115]; Department of Education and Training Victoria, 2021[116]). Similarly, in April 2021, the Government of the United Kingdom (Government of the United Kingdom, 2021[117]) announced a GBP 280 million (EUR 326 million) capital funding boost to improve existing provision to create modern, fit-for-purpose spaces adapted to an extended range of student needs. Accessibility does not only concern spaces, but also materials provided to students. For this reason, for instance, the Department of Education of the

Government of Ireland (2019[118]) offers an Assistive Technology Grant that administers funding to schools towards the cost of computers and specialist equipment.

Twenty-one of the education systems who participated in the Strength through Diversity Policy Survey 2022 reported having provisions for changing the physical infrastructure and facilities in to accommodate students with SEN. As shown in Figure 3.7, five education systems had provisions for changes to school infrastructure and facilities to support the needs of LGBTQI+ students. Changes to physical infrastructure and facilities for LGBTQI+ students typically relate to the provision of gender-neutral restrooms or changing areas, to allow students to have access to facilities that reflect their gender identity.

Figure 3.7. Does the policy framework include provisions for changing physical school infrastructure and facilities, for specific groups of students?

Number of education systems



Note: This figure is based on answers to the question "Does the policy framework include provision of any of the following non-instructional services for specific groups of students at ISCED 2 level? [Changing school infrastructure/facilities]". Thirty-two education systems responded to this question. Response options were not mutually exclusive.
Options selected have been ranked in descending order of the number of education systems.
Source: OECD (2022[35]), Strength through Diversity Policy Survey 2022.

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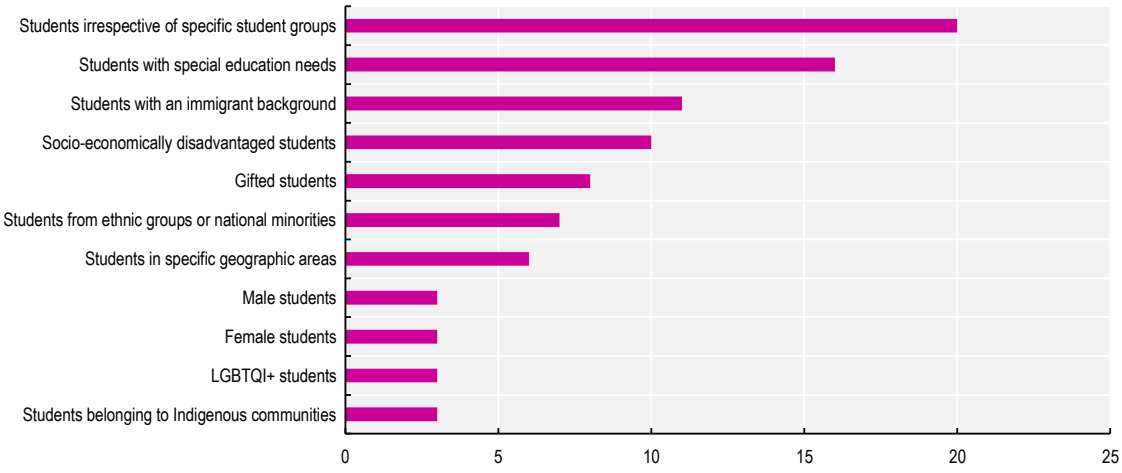
Educational materials and digital devices

Disparities in material resources exist between advantaged and disadvantaged schools, rural and urban schools, and public and private schools (OECD, 2020[7]). As mentioned in the Introduction, students attending schools with fewer shortages of material resources perform better in PISA reading assessment, on average across OECD countries. Shortages of educational materials also appeared to be more strongly associated with lower reading performance than shortages of physical infrastructure, after accounting for students' and schools' socio-economic profiles (OECD, 2020[7]). This underlines the key role of educational materials for disadvantaged students.

As shown in Figure 3.8, 20 of the education systems who participated in the Strength through Diversity Policy Survey 2022 referred providing educational material to all students, irrespective of them belonging to a specific group. In Finland, for instance, schoolbooks, learning materials and equipment are all provided free of charge for the nine-year basic education (OECD, 2022[17]). Other systems, as shown in Figure 3.8,

reported providing material resources to specific student groups, such as students with SEN (16 systems), students with an immigrant background (11 systems) and socio-economically disadvantaged students (10 systems).

Figure 3.8. Providing educational (instructional) materials (e.g., textbooks)



Note: This figure is based on answers to the question "Does the policy framework include provision of any of the following non-instructional services for specific groups of students at ISCED 2 level? [Providing educational (instructional) materials (e.g., textbooks)]". Thirty-two education systems responded to this question. Response options were not mutually exclusive.
Options selected have been ranked in descending order of the number of education systems.
Source: OECD (2022[35]), Strength through Diversity Policy Survey 2022.

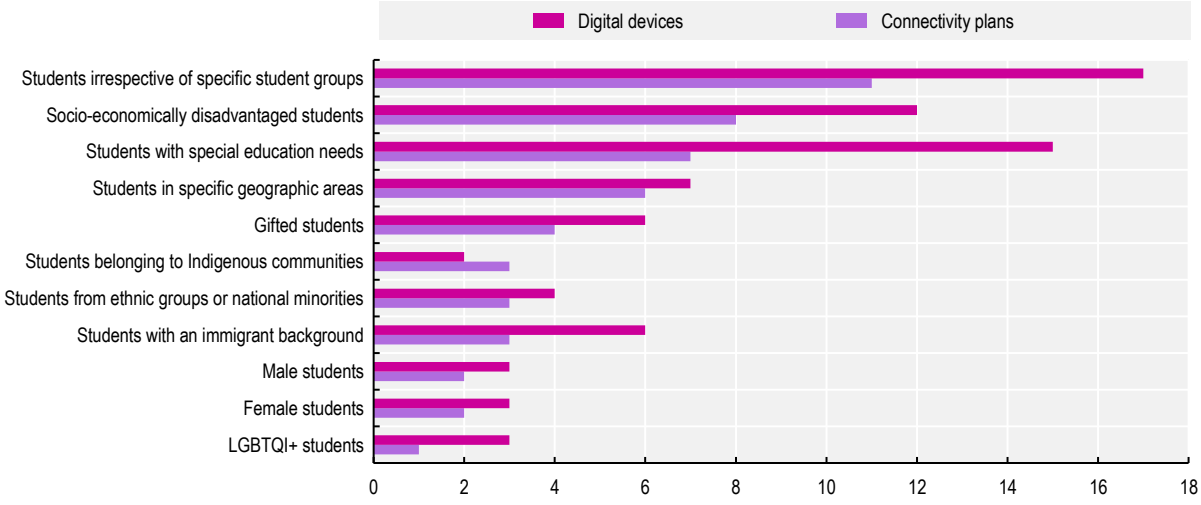
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A further issue in terms of educational equity is driven by the fact that not all students have the same access to digital devices (see also in Chapter 2), although there is great variation across countries in this respect (OECD, 2020[119]). This issue gained particular prominence during the first months of the COVID-19 pandemic, when school closures required most OECD systems to move education online (Cerna, Rutigliano and Mezzanotte, 2020[120]). In some cases, especially pre-COVID-19, policies relating to digital devices focused on meeting needs at the school level instead of household or individual level. For instance, Japan provided schools with computer equipment, networking and cloud infrastructure, expecting that they would be used at school, rather than at home (OECD, 2021[121]). During the COVID-19 pandemic, however, some countries worked on reaching students without access to digital devices by distributing them for free (Cerna, Rutigliano and Mezzanotte, 2020[120]). Chile, for instance, distributed nearly 125 000 computers with an internet connection in various cities across the country (Ministry of Education, 2020[122]). Providing personal devices to individual students has been implemented in many systems. The governments of New Zealand and England (United Kingdom) paid for and helped schools distribute laptops so that each student would have access to one (OECD, 2021[121]). Likewise, the government of Slovenia, with the help of private donors, collected thousands of electronic devices to support vulnerable children without access to a computer (Ministry of Education, Science and Sport, 2020[123]). Other systems, instead, focused on specific groups when providing resources: in the city of Rome, Italy, the local administration focused not only on students from a disadvantaged socio-economic background, but also on identifying Roma students without digital devices and internet connection and provided them with computers, tablets, and tried to solve the connectivity issues (Cerna, Rutigliano and Mezzanotte, 2020[120]).

In addition, digital devices can be leveraged by governments to provide additional inclusive learning resources such as online tutoring, homework help and language instruction (Gottschalk and Weise, Forthcoming[124]). For instance, in Korea, the “Cyber Home Learning System” is designed to balance the inequity arising from families with a higher socio-economic background who often provide private tutors for their children outside of school. The System aims to bridge the gap between more and less advantaged students by providing free online tutors to all students, regardless of their socio-economic economic background (Avvisati et al., 2013[125]). A similar programme in France offers an online homework support tool as part of the “Homework Done” programme. It assists students who might not have support at home with their homework (Ministère de l'Éducation Nationale, de la Jeunesse et des Sports, 2018[126]).

Seventeen of the education systems who responded to the Strength through Diversity Policy Survey 2022 reported providing digital devices and eleven proving connectivity plans to all students, irrespective of whether they were part of a specific group (as shown in Figure 3.9). Moreover, 15 education systems noted that they specifically targeted students with SEN with digital devices and seven with connectivity plans. Socio-economically disadvantaged students were also often targeted by education systems, as 12 systems provided them with digital devices, and eight with connectivity plans. Digital devices were overall provided more often than connectivity plans, and several countries targeted also students in specific geographic areas, gifted students and students with an immigrant background.

Figure 3.9. Providing students with digital tools



Note: This figure is based on answers to the question "Does the education policy framework in your jurisdiction require the provision of any of the following resources at ISCED 2 level?". Thirty-two education systems responded to this question. Response options were not mutually exclusive.
Options selected have been ranked in descending order of the number of education systems that require connectivity plans.
Source: OECD (2022[35]), Strength through Diversity Policy Survey 2022.

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As shown in the figure above, digital devices are provided to foster the inclusion of various groups. A common digital resource provided by education systems to support students with SEN is assistive technology (AT). Assistive technology can help, for instance, students who have difficulty communicating through speech and writing to participate more fully in education. Some examples of AT include laptops or tablets with modified software, joysticks, keyboards, touch pads, tapes, braille equipment and audiology equipment. In some countries, schools can apply for grants to obtain funding for providing students with

AT, as for example in Ireland where schools have access to "Assistive Technology Grants" from the Department of Education (Citizens Information, 2022[127]). In other systems, instead, local education authorities are responsible to provide students with AT. In the United States, students who are eligible under the "Individuals with Disabilities Education Act" (IDEA) have to be provided with AT by the school district to ensure that they can access, participate in and progress in the general education curriculum (Connecticut State Department of Education, 2022[128]). Indeed, as part of their Individual Education Plans (IEPs are discussed more in Chapter 5), districts have to provide relevant tools for them to succeed, at no cost – which prohibits school districts from excluding AT devices from a student's IEP solely based on the expense to be incurred (ibid.).

Other inclusive resources, such as online platforms, can supplement content and instruction not otherwise available (Gottschalk and Weise, Forthcoming[124]). For example, online platforms can be useful for providing difficult to access language instruction in minority languages. These tools can support students from diverse groups such as students with an immigrant background or Indigenous students. To support immigrant students, for instance, Sweden has made specialised teachers available on digital platforms for students' heritage language instruction (Cerna, 2019[129]). During the pandemic, New Brunswick (Canada) put in place online courses to support learning of English as an additional language for non-native speaker students (Cerna, Rutigliano and Mezzanotte, 2020[120]). To support Indigenous students, the Ministry of Education in New Zealand provided guidance and digital resources to support learning of the Māori language (Education Review Office of New Zealand, 2018[130]). Moreover, during the pandemic, the Mexican National Institute of Indigenous Languages (part of the Ministry of Culture) not only shared information and prevention during the pandemic, but also shared learning materials in Spanish and Indigenous languages (Cerna, Rutigliano and Mezzanotte, 2020[120]).

Matching human resources to schools: reflecting schools' needs in staff allocation policies

A past overview of whether and how European countries allocate additional resources to schools with disadvantaged populations finds that the majority provided resources in kind, most typically additional staff (European Commission/EACEA/Eurydice, 2016[16]). Successful schools[10] are generally able to deploy their best teachers to work with students who need the most support, such as disadvantaged ones (Sharp et al., 2015[131]). This also implies that students who are most in need – for instance, those from socio-economically disadvantaged backgrounds – are exposed to good teachers and effective teaching practices (OECD, 2022[132]).

Inequalities in teacher allocation can hamper equity in education

Inequalities in teacher allocation represent a common challenge across OECD countries, which can negatively impact the equity of the education system. Addressing this requires a holistic approach that considers a range of policy levers, including how the recruitment and allocation of teachers is regulated at the system level, perceptions regarding the experience of teaching in disadvantaged schools, and the support provided to teachers, particularly at the initial stages of their careers (areas discussed more extensively in Chapter 4).

Data show that new teachers tend to be disproportionately represented in schools with high concentrations of students from more disadvantaged socio-economic backgrounds (OECD, 2019[133]). Moreover, TALIS 2018 found that experienced teachers are more likely to work in schools with a low concentration of socio-economically disadvantaged students (less than 10% of the student body) than in schools where disadvantaged students constitute more than 30% of the student body in many of the participating countries (OECD, 2022[134]).

While new teachers are likely to report "benefiting the socially disadvantaged" as an important motivating factor in their decision to become a teacher (OECD, 2019[133]), they may lack the experience, skills and training to effectively respond to the challenges and demands that may arise in these environments

(OECD, 2019[135]). This is reflected in data from across the OECD showing that new teachers, on average, tend to feel less confident in their teaching abilities compared to their more experienced colleagues, particularly in their classroom management skills and their capacity to use a wide range of effective instructional practices (OECD, 2019[135]; Schulz, 2018[136]). As experience and solid training represent two of the main elements characterising the profiles of the most effective teachers across OECD countries (OECD, 2019[137]), the fact that new teachers are overrepresented in disadvantaged schools means that students from disadvantaged backgrounds are less likely to have access to high-quality teachers. Given that teacher quality has been recognised as the most significant influencing factor on students' educational outcomes (Hattie, 2015[138]; OECD, 2011[139]; Sammons and Bakkum, 2012[140]), inequitable teacher allocation can reinforce socio-economic inequalities in student performance (OECD, 2022[134]) and is thus a key concern from an equity perspective. Data from PISA 2015 showed that the more pervasive the level of inequalities in teacher allocation (in terms of experience and teacher qualification), the larger the difference in student performance related to socio-economic status in the particular education system (OECD, 2018[141]). Conversely, highly competent, quality teachers can have positive effects in terms of improving the learning outcomes of low-performing students and reducing the achievement gaps between disadvantaged and advantaged students (OECD, 2012[50]), thereby having the potential to play a key role in promoting equity in education.

Strategies to address inequalities in teacher allocation

Education systems across the OECD have implemented a variety of initiatives to address equity issues in teacher allocation. The Turkish education system, for instance, employs various incentives to attract teachers to remote and disadvantaged school settings, such as higher points in seniority that they can use towards gaining promotions and obtaining salary increases (OECD, 2017[142]; OECD, 2022[134]). In Japan, a mandatory rotation system (*jinji idou*) governed by local education authorities requires teachers to relocate to different schools periodically (Brussino, 2021[143]; Seebruck, 2021[144]). The stated aims of this policy include balancing attributes like age and gender in the teaching populations of schools, giving teachers varied experience, and achieving a more equal spread of educational quality (OECD, 2022[134]). However, in systems such as this, there is a risk that the negative impacts associated with a high turnover may offset the potential benefits of teacher rotations. Carefully defining set criteria for determining teacher transfers are in this respect crucial to ensure that rotation systems enhance equity through matching teachers' skills and experience levels with the schools and areas that need them the most (ibid.).

Financial incentives are another strategy used to attract teachers to disadvantaged schools, and have been adopted in several education systems across the OECD (OECD, 2012[50]). However, in order to be effective in improving the quality of teaching, they should be accompanied by measures to ensure teachers have the capacity to be successful in these environments (ibid.). In Korea, financial incentives to teach in high-need schools are accompanied by mechanisms to support teachers, including smaller class sizes and reduced instructional time, as well as additional credits when applying for promotional opportunities (Kang and Hong, 2008[145]; OECD, 2012[50]). Students from disadvantaged socio-economic backgrounds in Korea have been reported as being more likely to be taught by highly qualified and experienced mathematics teachers, which could suggest the potential of more holistic strategies to attract high-quality teachers to disadvantaged schools (OECD, 2012[50]).

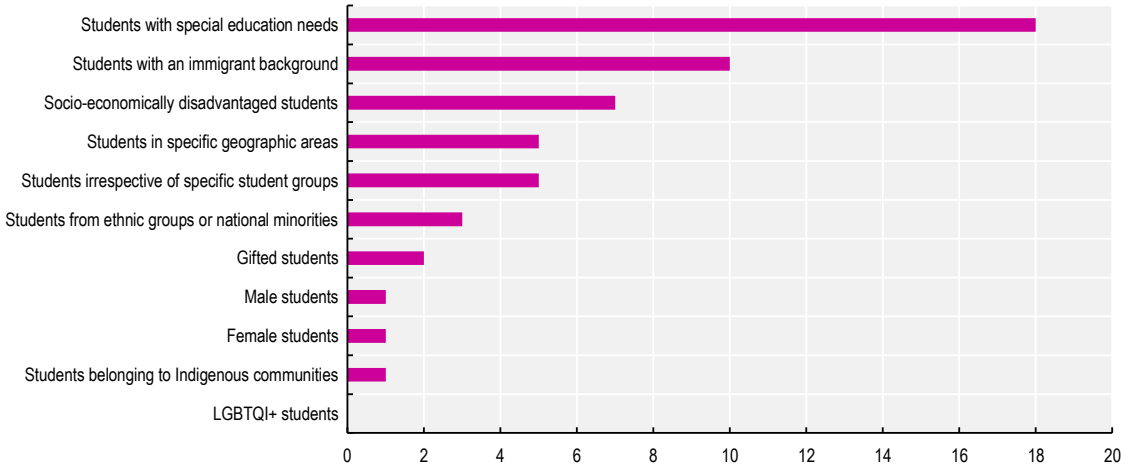
Alternative teacher certification programmes are another strategy adopted to attract highly qualified individuals to teach in disadvantaged settings through providing faster and more affordable pathways to teacher certification. These programmes typically provide non-teaching graduates with the opportunity to earn accredited teaching qualifications while earning an income (and without having to undertake a long period of further study). In New Zealand, for instance, the Teach First New Zealand programme is an alternative field-based initial teacher education (ITE) programme that aims to improve equity in education through recruiting high-achieving individuals with degrees in fields other than teaching to teach in schools with a high concentration of economically disadvantaged students (Ako Mātātupu Teach First NZ, 2022[146];

Whatman, MacDonald and Stevens, 2017[147]). After completing a nine-week training course, participants in the programme teach in schools serving low socio-economic communities on a reduced instructional workload for two years, at the completion of which they are eligible to apply for registration to become provisionally certified teachers (Whatman, MacDonald and Stevens, 2017[147]). Similarly, the High-Achieving Teachers Programme is an initiative funded by the Australian Government that provides two alternative, employment-based pathways into teaching for high-achieving individuals who are committed to pursuing a career in teaching. Participants are placed in secondary schools experiencing teacher shortages and receive on-the-job training and support while they complete an accredited teaching qualification (Australian Government Department of Education, Skills and Employment, 2022[148]). A similar programme exists in the United Kingdom (TeachFirst, 2022[149]) and at the international level (Brussino, 2021[143]; Teach For All, 2022[150]). However, there is evidence that alternative teacher certification programmes may not always provide adequate preparation for candidates to be effective teachers in disadvantaged schools (Boyd and al, 2008[151]; Darling-Hammond, 2010[152]; OECD, 2012[50]). Induction and mentoring programmes for teachers recruited through these pathways may play a critical role in this respect.

Allocation of teaching staff to support diverse students

Generally, successful schools also ensure that teaching assistants (TAs) are well trained in supporting pupils' learning as well as in specific learning interventions, so that TAs can provide effective support to individual pupils or small groups (Sharp et al., 2015[131]). They also ensure strong teamwork between teachers and support staff. While teacher preparation is discussed more in depth in Chapter 4, this section discusses the role of policies that allocate staff to schools to support equity and inclusion at the system level.

Figure 3.10. Allocating more teaching staff during instruction



Note: This figure is based on answers to the question "Does the education policy framework in your jurisdiction require the provision of any of the following resources at ISCED 2 level? [Allocating more teaching staff during instruction]". Thirty-two education systems responded to this question. Response options were not mutually exclusive.
Options selected have been ranked in descending order of the number of education systems.
Source: OECD (2022[35]), Strength through Diversity Policy Survey 2022.

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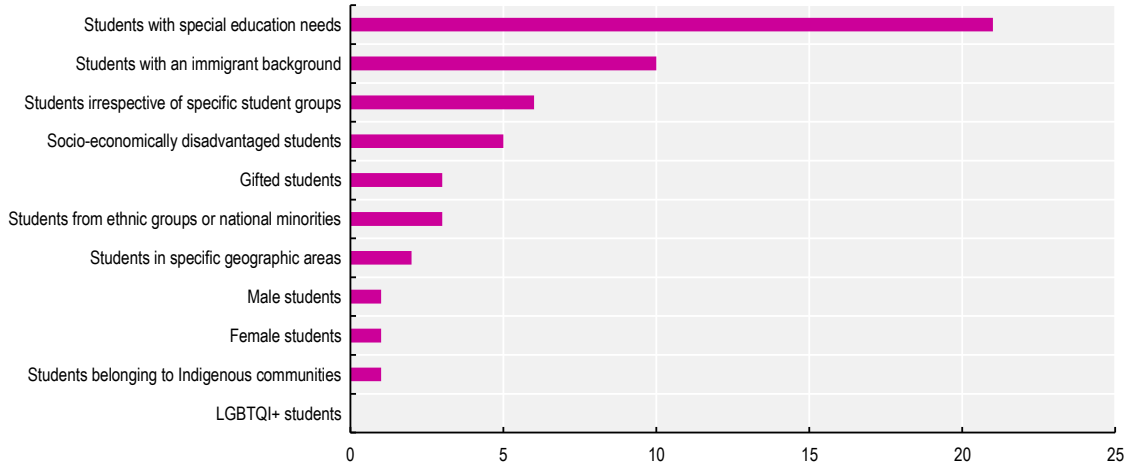
Countries have different means to provide staff resources to schools, from mobilising teaching or TA staff during instruction, to allocating teaching or learning support staff after instruction (such as during in-school extra-curricular activities or for homework support). A variety of education systems reported allocating additional staff during instruction to support particular student groups. As shown in Figure 3.10 above, most systems (18) referred providing additional teachers to students with SEN.

This occurs, generally, either on the basis of a required diagnosis or by a signalling of need for additional support from the school. In Austria, for instance, schools are eligible to receive additional personnel resources after a student's diagnosis of SEN is formalised (though schools are required to use all possible support measures to help students before this occurs). The federal government provides the provinces with funding for additional staff resources for special needs education (European Agency for Special Needs and Inclusive Education, 2020[153]). In the German-speaking Community of Belgium, students receive an additional hour of support from "integration teachers", based on a formal decision of their level of support needed (high/low), which revolves around a diagnosis of SEN that cannot be addressed sufficiently by general education measures (OECD, 2022[107]).

In Ireland, special education teachers are deployed to address the needs of students with SEN according to identified needs, rather than based on a diagnosis (National Council for Special Education, n.d.[154]). The rationale of this system is that a diagnosis does not *per se* establish the amount of support needed by students, as the same disorder can lead to different difficulties and needs. This need-based system gives schools greater autonomy and flexibility in how they allocate special education teaching resources. Schools may deploy special education teachers in a variety of ways in order to effectively meet students' needs (for example, in-class support, group withdrawal).

Another common resource provided for students with SEN is teaching assistants or additional learning support staff, as was shown in the results of the Strength through Diversity Policy Survey 2022 (Figure 3.11).

Figure 3.11. Allocating learning support staff (e.g., teaching assistants) during instruction



Note: This figure is based on answers to the question "Does the education policy framework in your jurisdiction require the provision of any of the following resources at ISCED 2 level? [Allocating learning support staff (e.g., teaching assistants) during instruction]". Thirty-two education systems responded to this question. Response options were not mutually exclusive.
Options selected have been ranked in descending order of the number of education systems.
Source: OECD (2022[35]), Strength through Diversity Policy Survey 2022.

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A number of OECD education systems also reported providing additional teachers or learning staff to support students with an immigrant background (Figure 3.10 and Figure 3.11). In the Flemish Community of Belgium and Saxony (Germany), non-native speaking students are allocated extra teacher hours (Eurydice, 2022[155]; Sugarman, Morris-Lange and Mchugh, 2016[156]). In the German-speaking Community of Belgium, pre-primary education settings can apply for additional staff funding when they enrol at least 12 newcomer children that do not speak the language of instruction at least at an A2 level[11] (MDG, 2019[106]; OECD, 2022[107]).

Pointers for policy development

The final section of this chapter provides a series of policy options that countries can consider to promote equity and inclusion through the design of resourcing of education systems. These have been developed on the basis of the analysis of different policies and practices developed in this chapter, which draws on available evidence and research literature along with experiences discussed in country-specific work of the Project and other OECD work.

Leverage both main allocation mechanisms and targeted funding to foster equity and inclusion

A key element for fostering equity and inclusion in education is the allocation of funding to the schools and students that are most in need of additional resources. Indeed, OECD work highlights that, above a certain level of funding, it is more important *how* the funding is allocated. Countries should leverage both regular and targeted funding, while balancing their potential drawbacks (OECD, 2022[157]). Targeted funding allows countries to better steer and monitor the use of public resources to foster equity and inclusion, but entails risks of multiplication of programmes, lack of co-ordination, excessive bureaucracy and inefficiencies. Adjusting main allocation mechanisms to be needs-based can reduce transaction costs, streamline the resourcing system and allow education providers to decide allocation of funds according to their specific needs; however, regular allocations allow central governments to exert limited overview and control on the actual allocation of funds by education providers towards equity and inclusion.

Countries should thus consider the different purposes that allocation systems can serve when adopted with the goal to foster equity and inclusion. Moreover, they should design their allocation systems while accounting for their potential shortcomings and planning how to counterbalance them. This could entail carefully monitoring that targeted programmes do not overlap in scope, or designing monitoring systems that keep track of the use of funds for equity and inclusion purposes. Keeping track on the effectiveness of the resourcing system can also support countries to identify whether they are incurring in the aforementioned challenges and to correct any arising issue.

Employ different types of resources and parameters to allocate them, to provide resources for diverse student groups, and to support policy priorities related to equity and inclusion

Education systems have access to a range of different types of resources to support their student population, spanning from financial transfers to physical and human resources that they can allocate to schools and classrooms. Moreover, education systems can also target specific groups with resources by incorporating relevant parameters in their main allocation mechanisms' funding formulas. These pathways can all be leveraged by education systems, which should evaluate which mix of resources can better serve their needs.

Different types of resources can be actively leveraged by education systems to directly provide diverse student groups with extra funds or support, and be leveraged to pursue specific policy objectives (e.g., as

fostering equity). For instance, subsidies to access ECEC services and the provision of free school meals can be used to support socio-economically disadvantaged families; scholarships can be assigned to minorities to pursue fields of study in which they are underrepresented; and transportation and assistive technologies can be provided to support students with SEN. Moreover, infrastructural investments can be implemented to make spaces in schools more accessible and inclusive for all students, through, for instance, ensuring that LGBTQI+ students have safe spaces such as changing rooms and bathrooms, providing students with SEN with accessibility features, and reflecting the identities of ethnic minorities and Indigenous students' presence in the school environment. Education systems should therefore carefully evaluate which student groups they need to target with different types of resources, and which policy goals they are aiming to achieve.

Including specific parameters, such as the number of immigrant students or students with SEN, in an education system's funding formula can also serve at providing additional resources to specific groups. Similarly, taking into account the geographical location (i.e., remoteness) of education providers or the socio-economic composition of their school population can serve equity and inclusion purposes. This method to attribute funding (if it is not earmarked), however, needs to account for the fact that education providers may not be allocating the funds they receive to match the parameters that concern diverse students, or equity and inclusion purposes. This may require education systems to develop accountability measures to ensure that education providers are using the funds for the intended students and/or goals.

Strengthen the capacity of different administrative levels to support education and inclusion goals

Some education systems are decentralised, which means that part of the decisions – including the allocation of funding to schools – is taken at the regional or local level. Decentralised systems require central authorities to take into account not only the role of the different administrative levels in the education financing process, but also the incentives that guide their decisions. Rationally, local education providers will aim to optimise the use of resources in their budgeting processes, and to fulfil their goals. While local entities may be more likely to have a clear understanding of their student population's needs than central authorities, they could also be more interested in fulfilling policy goals other than the ones sought by central authorities. They may also choose to take or not take a particular course of action on the basis of whether this is likely to maximise their chances of receiving further funding, rather than the ultimate policy goal. For instance, in a situation where the education system provides additional funding to local authorities with a low level of school resources, the authorities may be induced to reduce the funding to specific schools to increase their chances of securing such extra funds. Likewise, if the central authority were to use indicators on the concentration of immigrant students in schools to provide additional funding, it is possible that municipalities would have less of an incentive to tackle the issue of segregation in schools. Education systems should evaluate where potential (negative) reactions may arise when designing their funding systems and plan appropriate counterbalances for them. For this to be possible, it is important that the funding reform be accompanied by strong evaluation and monitoring processes.

However, education systems should also take into account that local authorities play a fundamental role in the implementation of education policies and should be supported in achieving equity and inclusion goals. Local entities' autonomy can improve the effectiveness of educational services provisions, but different entities may have different capacity and competences. Central authorities can strengthen the knowledge base on relevant topics, such as equity or equitable resource allocation mechanisms, across municipalities. They can also strengthen the capacity of schools to assume budgetary responsibilities, in contexts where they have them. Central authorities should also take on the role of facilitators of exchanges of ideas, experiences and good practices across local authorities and/or schools in decentralised systems. This would serve the goal of developing capacity across entities more evenly.

Lastly, central authorities can involve municipalities and other stakeholders when developing their financing systems, as to ensure that these are understood and supported by the relevant stakeholders, who can also flag potential challenges before they arise.

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Annex 3.A. Students accounted in funding formulas and evaluation of funding models

Annex Table 3.A.1. Groups of students accounted for in the funding formulas (ISCED 2), by education system

Country	Students with an immigrant background	Students from ethnic groups or national minorities	Students belonging to Indigenous communities	LGBTQI+ students	Students with special education needs (SEN)	Gifted students	Socio-economically disadvantaged students	Students in specific geographic areas	Female students	Male students	No funding formula
Australia	x		x		x		x				
Canada	x				x			x			
Chile					x		x	x			
Colombia	-	-	-	-	-	-	-	-	-	-	-
Czech Republic					x	x	x				
Denmark											x
England (United Kingdom)	x				x		x				
Estonia	x				x			x			
Finland					x		x				
Flemish Community of Belgium	x				x		x	x			
France											x
French Community of Belgium	x				x		x				
Greece	x				x		x	x			
Iceland	x				x		x	x			
Ireland					x		x				

Country	Students with an immigrant background	Students from ethnic groups or national minorities	Students belonging to Indigenous communities	LGBTQI+ students	Students with special education needs (SEN)	Gifted students	Socio-economically disadvantaged students	Students in specific geographic areas	Female students	Male students	No funding formula
Italy	x				x		x				
Japan	x				x		x				
Korea	x				x	x	x	x			
Latvia		x			x						
Lithuania		x			x						
Luxembourg											x
Mexico	-	-	-	-	-	-	-	-	-	-	-
Netherlands	x				x	x	x				
New Zealand					x		x	x			
Northern Ireland (United Kingdom)	x	x	x		x		x	x			
Norway											x
Portugal	x	x			x		x	x			
Scotland (United Kingdom)					x		x				
Slovak Republic					x	x					
Slovenia	x	x			x		x				
Spain					x	x	x	x			
Sweden											x
Türkiye	x				x	x					
United States	x	x	x		x		x	x			
Total	17	6	3	0	27	6	21	12	0	0	4

Note: Question “Are any of the following groups of students accounted for in the funding formulae in your education jurisdiction at ISCED 2 level?”. The answers option included also ‘Do not account for the above student characteristics’, which was not selected by any respondent. Responses were not mutually exclusively.
Source: OECD (2022[35]), Strength through Diversity Policy Survey 2022.

Annex Table 3.A.2. Advantages and disadvantages of input, throughput and output models

	Advantages	Disadvantages
Input scheme	1) Direct linkage between needs and resources. 2) Identification of students with special education needs can be based on an official and shared assessment. The demand-driven nature of the model supports comprehensive coverage of SEN. 3) As funding is not directly linked to expenses, this system might promote cost efficiency. 4) Support of parental choice.	1) No direct incentives to improve the quality of services provided. 2) The cost of assessing special education needs: Demand-driven models might increase the risks of over-identifying SEN. 3) Demand-driven models that risk over-identification of special education needs might create risks of budget inflation. 4) Parental power in decision making might not always lead to informed decisions concerning their children's education. It might also increase social inequalities and competition among schools.
Throughput scheme	1) Funding is generally stable and predictable. 2) Can support a good balance between local flexibility and accountability. Opportunities for implementing an incentive-based system. 3) Less administrative burden might stimulate greater efficiency. 4) It favours education in inclusive settings and entails less direct risks of stigmatising because no labelling is directly required.	1) The simplicity of the funding mechanism might lead to a less adequate, flexible and equitable allocation of resources. As the model is not directly driven by the demand of special education needs, high concentration of SEN in one area might not always imply sufficiency of funding. 2) Vulnerable to cost expansions and entails greater administrative costs. 3) It is not clear whether resource-based systems entail cost efficiency. 4) No direct incentives to improve quality of services.
Output scheme	1) Promotes a set of desirable results. 2) Hinders the risks of incentivising schools not to improve performance.	1) Risk of not channelling resources where the need is greater. 2) Risk of inducing the transfer of low-performing students to other school settings and enhancing competitions among schools.

Source: Brussino (2020[61]), Mapping policy approaches and practices for the inclusion of students with special education needs, OECD Working Paper, OECD Publishing, https://dx.doi.org/10.1787/600fbad5-en; adapted from Shewbridge (Unpublished[158]), Funding Education for Students with Special Educational Needs, OECD Unpublished Working Paper.

Notes

[1] This could entail the exemption from school fees in systems that require them, provision of school material, etc.

[2] **Lump sum grants** consist of funding for the public sector and leaves discretion to sub-national authorities over the proportion allocated to early childhood and school education. **Block grants** are funds that recipients (sub-national authorities or schools) can use at their own discretion for current expenditure in early childhood or school education. **Earmarked grants** consist of funds that recipients (sub-national authorities or schools) are required to use for specific elements/items of current expenditure in early childhood or school education (e.g., teacher professional development, extra funds for special needs education) (OECD, 2017[15]).

[3] School deciles indicate the extent the school draws their students from low socio-economic communities. New Zealand uses deciles to target funding, as, the lower the school's decile, the more funding it receives (Ministry of Education, 2022[159]).

[4] The model to compute the Equity Index looks at cohorts of children from the last 20 years, who have already passed through the school system. It assesses which socioeconomic characteristics observed at different ages best predict a student's achievement at different school levels. It then looks at the socio-economic characteristics of students enrolled at schools for the last three years and predicts how likely they are to achieve at different levels. Student numbers are averaged at an individual school level to produce an Equity Index number for each school. The Special Education Grant (SEG) and Careers Information Grant (CIG) will also utilise the new EQI in lieu of deciles (New Zealand Ministry of Education, 2022[24]).

[5] A perverse incentive is an incentive that has an unintended and undesirable result that is contrary to the intentions of its designers.

[6] For more information, see Annex Table 3.A.1 in "The Funding of School Education: Connecting Resources and Learning (OECD, 2017[15])".

[7] Education at a Glance (OECD) uses as terminology 'low-income students' and 'students with disabilities', but the terms are considered to match with the Strength through Diversity Project's understanding of socio-economic disadvantage students and special education needs.

[8] Support measures that schools use to support the participation and learning improvement of all students, which include differentiated instruction, curricular accommodations and/or enrichment, promotion of pro-social behaviour.

[9] Finland has nine years of basic education, from age 7 to 16. It is part of compulsory education in Finland, which lasts until 18 years old.

[10] The paper defines more successful schools as those where the attainment of students eligible for free school meals or looked after by the local authority was better than expected, after taking account of the characteristics of the school and the student cohort.

[11] A2 level is the second level of the Common European Framework of Reference (CEFR), a definition of different language levels written by the Council of Europe.

4 Building capacity to foster equity and inclusion

This chapter discusses how education systems can develop capacity to respond to diverse student needs and create a system in which school staff, students, parents, guardians and members of the broader community all share and support the will to foster equity and inclusion. It discusses the importance of preparing teachers to address diversity and promote equity and inclusion, and of recruiting and retaining teachers from diverse backgrounds. This chapter also considers capacity building in terms of cultivating values of acceptance, tolerance and respect among students. Finally, it discusses the importance of building awareness among parents, students, teachers and communities more broadly, as a key step in ensuring that the different stakeholders of a given system are on board with and collaborate for advancing equity and inclusion in education.

Introduction

This chapter examines the importance of capacity building in supporting all learners to achieve their educational potential and in fostering students' self-worth and sense of belonging to schools and communities.

Teacher quality has frequently and long been acknowledged as a significant factor in students' academic performance. However, beyond learning outcomes, teachers, as the primary actors in the classroom, also play a critical role in fostering students' overall well-being. In light of this, developing teachers' capacity to identify and serve students' needs has been recognised as a key policy lever in advancing equity and inclusion in education. This involves not only incorporating competences and knowledge areas for equitable and inclusive teaching into initial teacher education (ITE) programmes but also ensuring that teachers are able to update and deepen their knowledge through high-quality professional learning and opportunities for collaboration. Professional learning and opportunities for collaboration are also essential to prepare and support school leaders, who are central actors in shaping the ethos of schools, and in ensuring that policies for equity and inclusion are carried into effect through practices tailored to the local context of the school and community.

Enhancing the diversity of the teaching workforce can have positive impacts on multiple dimensions of student well-being, from learning to broader socio-emotional outcomes, for both learners from diverse groups and for the student body as a whole. However, lack of diversity among teachers is a challenge faced by many OECD education systems, with evidence showing imbalances in representation across various dimensions of diversity. Addressing this involves considering both strategies for attracting diverse candidates into initial teacher education and how diverse teachers can best be supported so that they are more likely to stay in the profession.

Beyond teachers and school leaders, the perceptions and attitudes of a range of stakeholders feed into shaping the classroom environment and the extent to which it is inclusive for diverse students. Cultivating an appreciation for diversity and values of acceptance, respect and understanding among students is a crucial aspect in creating learning spaces in which all students feel a sense of belonging and can achieve their educational potential. In addition, raising awareness of diversity in society among parents and community members is also an important foundational step in advancing equity and inclusion in education, both to mitigate stereotypical or discriminatory beliefs and to ensure that a range of stakeholders support and contribute to the successful implementation of equitable and inclusive policies and practices.

This chapter has seven sections. After this introduction, the second section discusses the importance of preparing teachers to effectively respond to diversity in the classroom, examining in particular how diversity, equity and inclusion can be incorporated into teachers' initial teacher education and continuous professional learning. The third section then considers the various functions and roles of school leaders in promoting equity and inclusion in education, and reflects on the need to prepare and support school leaders in this respect. The fourth section addresses strategies to promote the recruitment and retention of teachers from diverse backgrounds and groups, in light of the positive impacts enhanced diversity of school staff can have for student well-being. This chapter then explores how schools can cultivate values of acceptance, respect and understanding by fostering positive relationships among students, before discussing the importance of awareness-raising to ensure wide-ranging support for and collaboration in the implementation of policies and practices to promote equity and inclusion in education. It concludes by setting out some pointers for policy development.

Preparing and supporting teachers to respond to increasing diversity and create equitable and inclusive learning environments

Efforts to promote equity and inclusion in education depend upon high-quality teachers who are properly prepared and supported to respond to increasing diversity and create learning environments in which all students can thrive (Cerna et al., 2021[1]). Teachers, as the predominant actors in setting the nature of the classroom environment, play a pivotal role in multiple dimensions of student well-being. While teacher quality has frequently and long been acknowledged as having a powerful impact on students' learning outcomes (OECD, 2022[2]), teachers can also raise students' social and emotional skills (Blazar and Kraft, 2017[3]; Jackson, 2018[4]; OECD, 2022[2]), and their dispositions and competences can influence students' engagement, drive and self-beliefs (Rutigliano and Quarshie, 2021[5]). Teachers' practices have, for instance, been recognised as playing a role in reducing cognitive and socio-emotional gaps related to socio-economic status (OECD, 2018[6]). Research further shows that teachers, and in particular their attitudes, will and training, have a profound influence on the educational development and psychological well-being of gifted students, playing a central role on their identification, support and monitoring (De Boer, Minnaert and Kamphof, 2013[7]; Lassig, 2015[8]; Plunkett and Kronborg, 2019[9]; Polyzopoulou et al., 2014[10]; Rutigliano and Quarshie, 2021[5]). Similarly, teachers often play an important role in the recognition or identification and referral of various special education needs (SEN), such as attention deficit hyperactivity disorder (ADHD) (Brussino, 2020[11]; Mezzanotte, 2020[12]; Moldavsky et al., 2012[13]). There is also evidence to indicate that teachers' perceptions, and specifically their expectations regarding educational potential and attainment, can impact on the learning outcomes of refugee students (Koehler, Palaiologou and Brussino, 2022[14]).

In light of this, developing teachers' capacity to manage diversity and respond to all students' needs has been recognised as a key policy lever in advancing equity in education (OECD, 2018[6]). Beyond being a central aspect in supporting all learners to achieve their educational potential, it is also a crucial component in fostering students' self-worth and sense of belonging to schools and communities (Cerna et al., 2021[1]).

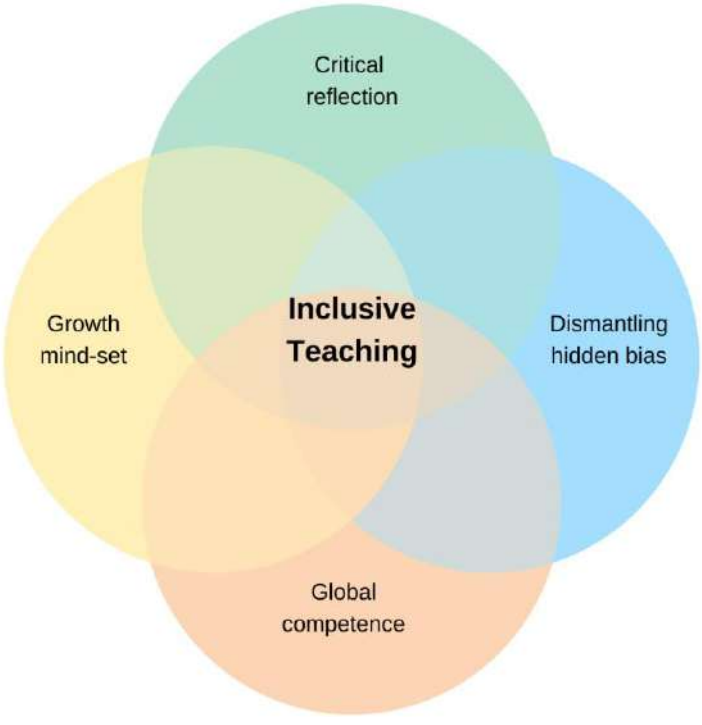
Competences and knowledge for equitable and inclusive teaching

Teaching is a complex, multifaceted task, and even more so in a context of rapid societal change (Forghani-Arani, Cerna and Bannon, 2019[15]). Increasing diversity in the classroom is resulting in additional expectations and demands on teachers, who are required to respond to a growing range of student needs (Brussino, 2021[16]). In order to be able to create equitable and inclusive learning environments that support all learners in achieving their educational potential, teachers need to be equipped with a range of competences, knowledge and attitudes (Cerna et al., 2021[1]). Knowledge areas for equitable and inclusive teaching are wide-ranging and may encompass cultural anthropology, social psychology, child cognitive development, integrated learning and second language acquisition (OECD, 2017[17]). These areas are in addition to a strong understanding of the different dimensions of diversity and of how they may intersect, which is a crucial foundation for the creation of equitable and inclusive learning environments (Cerna et al., 2021[1]). Teachers would also benefit from having knowledge and an appreciation of the historical, social and cultural context of the communities in which they teach. This has been identified as a key area for teachers' professional development in relation to teaching Indigenous students, along with knowledge of the relevant Indigenous language (OECD, 2017[18]). Research in the context of the United States also suggests that the extent to which White teachers address and value Black students' primary culture can be a significant factor in their academic success (Douglas et al., 2008[19]; Hale, 2001[20]; Irvine, 1990[21]). Teachers' reported culturally responsive teaching behaviours in relation to Spanish language and cultural knowledge have also been significantly and positively correlated to Latino students' reading outcomes in the United States (López, 2016[22]).

Supporting the learning and well-being of all students also requires teachers to have strong theoretical knowledge of differentiated instruction and the skills to put this into practice. Differentiated instruction has been defined as "an approach to teaching that involves offering several different learning experiences and proactively addressing students' varied needs to maximise learning opportunities for each student in the classroom" (UNESCO, n.d.[23]). Differentiated instruction is at the core of equitable and inclusive education systems, as it means responding to and serving all student needs (OECD, 2022[24]), thereby supporting all learners in achieving their educational potential (OECD, 2012[25]). It requires teachers to recognise students' different learning abilities, be flexible in their approach and adjust the way information is delivered to suit the needs and characteristics of different learners (OECD, 2022[24]; UNESCO, n.d.[23]). Differentiated instruction can, for instance, help foster the learning of students with an immigrant background by taking into consideration their proficiency in the host country language and adjusting learning content in light of this (Fairbairn and Jones-Vo, 2010[26]; OECD, 2022[24]). Teachers' abilities to adapt and differentiate teaching methodologies can also play an important role in supporting the academic success of students with ADHD (HADD Ireland, 2013[27]; Mezzanotte, 2020[12]). Research has further shown that tailoring teaching strategies to suit the needs of gifted students can enhance their learning outcomes at different levels of education (Callahan et al., 2015[28]; Rutigliano and Quarshie, 2021[5]).

The acquisition of these knowledge areas is both facilitated by and enables the development of the competences that are required for equitable and inclusive teaching. Brussino (2021[16]) identified four core competences that are key for teachers' ability to create learning spaces where all learners can thrive (Figure 4.1).

Figure 4.1. Core competences for inclusive teaching



Source: Brussino (2021[16]), "Building capacity for inclusive teaching: Policies and practices to prepare all teachers for diversity and inclusion", OECD Education Working Papers, No. 256, https://doi.org/10.1787/57fe6a38-en.

i. Critical reflection

Critical reflection refers to the process by which individuals identify the assumptions behind their actions, understand the historical and cultural origins of these assumptions, question their meaning and develop alternative ways of acting (Brussino, 2021[16]; Cranton, 1996[29]). When teachers critically reflect upon their identities, they can better understand and navigate the assumptions and perspectives they take into the classroom, which can affect how they teach and thus impact on students' learning and well-being (Brussino, 2021[16]; Shandomo, 2010[30]). Critical reflection can also help teachers acknowledge social constructs and the way in which perceptions of various dimensions of diversity contributes to creating sources of marginalisation and discrimination (Brussino, 2021[16]).

ii. Dismantling unconscious bias

Both teachers and students participate in the classroom with unconscious biases (Brussino, 2021[16]). These biases, which may be shaped by a diversity of factors (such as previous experiences, personal interactions and stereotypes), can affect their interactions and decision-making process in the classroom (Brussino, 2021[16]). Teachers can perpetuate or accentuate students' hidden biases by relying solely on their own cultural frames of reference, using language that is not inclusive of all students, or by favouring students who share their own perspectives and viewpoints (Brussino, 2021[16]). In turn, teachers' hidden biases can negatively affect student performance, self-expectation and learning (Cherng, 2017[31]; Lavy and Sand, 2015[32]). Teachers working in disadvantaged schools, for example, tend to hold low expectations regarding students' academic achievement, which can negatively impact students' self-esteem, aspirations and their motivation to learn and thus contribute to reinforcing inequities in education (OECD, 2018[6]; OECD, 2012[25]). Teachers can also have preconceptions regarding the capabilities of refugee and newcomer students, believing that these students are not capable of high achievement (McBrien, 2022[33]). Similarly, labelling students as having particular SEN can reduce the academic expectations held and set by teachers (Brussino, 2020[11]; Higgins et al., 2002[34]). Research has shown, for instance, that ADHD classification among students is negatively associated with teachers' academic expectations, which can in turn impact students' achievement, motivation and self-confidence (Batzle et al., 2009[35]; Mezzanotte, 2020[12]). Evidence also shows that both unconscious gender stereotyped bias among teachers can influence the way in which teachers award grades to students of different genders (Lavy and Sand, 2015[32]; OECD, 2015[36]). Teachers' preconceived ideas have further been shown to result in them being less likely to identify students from lower socio-economic and/or diverse backgrounds as gifted, which contributes to the underrepresentation of certain groups in gifted backgrounds (Casey, Portman Smith and Koshy, 2011[37]; Ford, 2010[38]; Rutigliano and Quarshie, 2021[5]). In addition to affecting the way in which they interact with or perceive their students, teachers' biases, if unaddressed, may result in them perpetuating an environment that is unsafe or harmful for some students, through, for instance, making prejudicial remarks about certain groups or neglecting to address those made by other students (McBrien, Rutigliano and Sticca, 2022[39]).

In order to be able to create environments that are inclusive for all learners, it is crucial that teachers are able to recognise their own biases and the ways in which these can impact on students, to reflect on them critically, and to engage in strategies to mitigate them (Brussino, 2021[16]).

iii. Global competence

Global competence can be defined as "the capacity to examine local, global and intercultural issues, to understand and appreciate the perspectives and world views of others, to engage in open, appropriate and effective interactions with people from different cultures, and to act for collective well-being and sustainable development" (OECD, 2018, p. 7[40]). Global competence requires a perspective-taking approach, adaptability, and a diverse set of socio-emotional skills, including communication and conflict resolution capabilities (OECD, 2018[40]). Equipping teachers with the knowledge and skills to develop their global competence is crucial to enable teachers to facilitate discussions on diversity and to promote inclusion in the classroom (Brussino, 2021[16]).

iv. Promoting a growth mind-set

Promoting a growth mind-set (in which individuals understand their abilities and knowledge as being able to be developed through effort, strategies and support (Dweck, 2016[41])) can have positive learning impacts, such as higher student motivation and performance, especially for students from disadvantaged backgrounds (Brussino, 2021[16]; Dee and Gershenson, 2017[42]). On average across OECD countries participating in PISA 2018, students who reported having a growth mind-set scored higher in reading, science and mathematics than students who reported having a fixed mind-set. A growth mind-set was associated with a larger score gain for students from disadvantaged backgrounds and immigrant backgrounds, when compared to advantaged and non-immigrant students (Gouëdard, 2021[43]), which indicates that facilitating the development of a growth mind-set in the classroom can be important from an equity perspective. A growth mind-set approach can be fostered through conceiving of and using feedback and formative assessments as a tool for student growth (Brussino, 2021[16]), as well as through pedagogies and teaching strategies that concentrate on students' effort rather than their intelligence (Columbia Center for Teaching and Learning, 2020[44]).

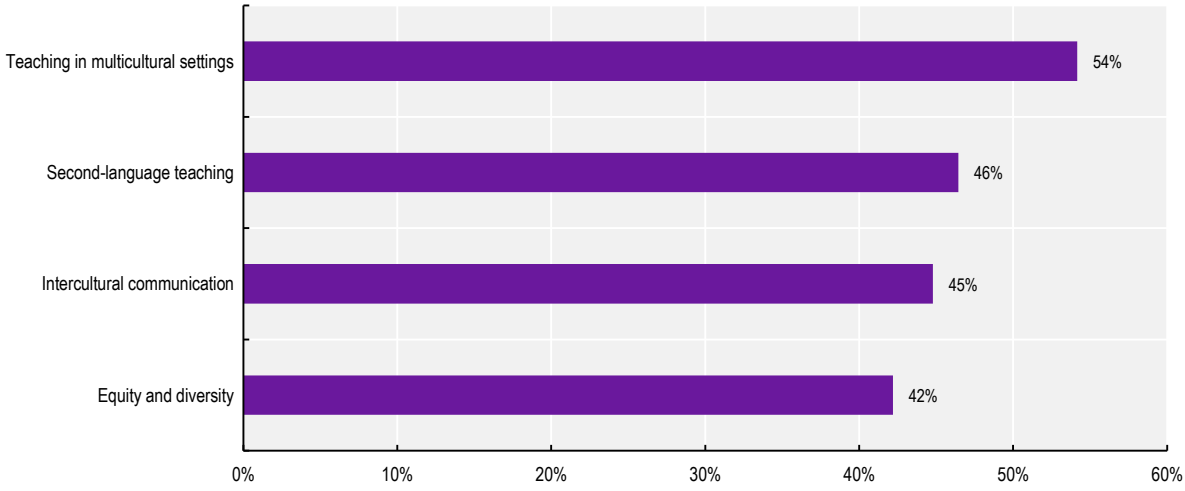
There is a need to better prepare and support teachers to respond to increasing diversity in the classroom

Despite growing interest in equity and inclusion in education, research suggests a need for greater emphasis on diversity, equity and inclusion in teacher training across OECD countries. (Brussino, 2021[16]). In the most recent OECD Teaching and Learning International Survey (TALIS), only 35% of lower secondary teachers reported that teaching in multicultural and multilingual settings had been included in their ITE and only 22% reported that it had been included in their professional learning activities in the previous 12 months, on average across the OECD (OECD, 2019[45]). Data from TALIS 2018 further showed that teachers generally did not feel confident in their ability to teach effectively in multicultural classrooms. On average across the OECD, only 26% of lower secondary teachers reported feeling well or very well prepared for teaching in a multicultural or multilingual setting upon finishing their formal ITE or training, and 33% of teachers reported that they still did not feel able to cope with the challenges of a multicultural classroom at the time of the TALIS survey completion (OECD, 2019[45]).

Teachers' self-perceived need for greater training in teaching in multicultural or multilingual settings, and in relation to diversity, equity and inclusion more generally, is also reflected in the OECD PISA 2018 survey (Figure 4.2). The results show, for instance, that, on average across participating countries, 54% of students attended a school where teachers reported a moderate-to-high need for training on teaching in multicultural or multilingual settings and 46% of students had teachers who reported a need for training in intercultural communication (OECD, 2020[46]). This need appears particularly acute in light of the fact that data from TALIS 2018 showed that 17% to 30% of teachers across the OECD worked in schools with a culturally or linguistically diverse student population, depending on the criterion considered (OECD, 2019[45]). Data further revealed a global increase between 2013 and 2018 in the share of teachers expressing a high need for training in teaching in a multicultural or multilingual setting (OECD, 2019[45]).

Figure 4.2. Teachers' needs for training on diversity, equity and inclusion (PISA 2018)

Percentage of 15-year-olds students attending a school where their teachers report a need for training on the following (on average across OECD countries)



Source: OECD (2020[46]), PISA 2018 Results (Volume VI): Are Students Ready to Thrive in an Interconnected World?, Table VI.B1.7.15, https://doi.org/10.1787/d5f68679-en.

StatLink https://stat.link/ka1gcd

Data from TALIS 2018 also revealed a need for greater teacher preparation in relation to teaching students with diverse abilities. While 62% of teachers reported that training on teaching in mixed-ability settings had been included as part of their formal ITE, only 44% of teachers reported feeling prepared to teach in such settings on completion of their studies (OECD, 2019[45]). At least one in five teachers on average across OECD countries reported a need for training on SEN, while 32% of school leaders reported that the delivery of quality instruction in their schools was hindered by a shortage of teachers with competence in teaching students with SEN (ibid.).

Research shows that teacher training and professional learning related to diversity and inclusion is important for teachers' feelings of self-efficacy regarding their ability to teach in diverse classrooms, as well as having a positive impact on their teaching practices (OECD, 2022[47]) and on their ability and willingness to support the needs of all learners. TALIS 2018 showed, for instance, that teachers who received training on teaching in multicultural or multilingual settings as part of their ITE and/or through continuous professional learning report higher levels of self-efficacy in teaching in such settings (OECD, 2019[45]). Research further showed that training on teaching in multicultural environments can help in addressing teachers' biases (Parkhouse, Lu and Massaro, 2019[48]) and in strengthening their capacities to foster positive relationships with students (Biasutti et al., 2021[49]; Varsik and Gorochovskij, Forthcoming[50]). Evidence also shows that gifted education programmes, from identification and assessment of students to differentiation and other pedagogical strategies, are more effectively implemented by teachers who have undertaken specialist studies in gifted education (Centre for Education Statistics and Evaluation, 2019[51]; Rutigliano and Quarshie, 2021[5]). Dedicated training courses have also been positively associated with improved teacher understanding of, and greater confidence in teaching content related to, LGBTQI+ issues (Greytak, Kosciw and Boesen, 2013[52]; Greytak and Kosciw, 2010[53]; Kearns, Mitton-Kukner and Tompkins, 2014[54]; McBrien, Rutigliano and Sticca, 2022[39]).

Strengthening the incorporation of topics related to diversity and inclusion in initial teacher education

Preparing and supporting teachers to respond to increasing diversity in the classroom and promote equitable and inclusive learning environments starts with ITE. Initial teacher education sets the foundation for teachers' on-going professional learning and plays a crucial role in equipping prospective teachers with the competences, values and knowledge to respond to a diverse range of needs and support all learners in achieving their educational potential (OECD, 2022[24]).

Integrating diversity, equity and inclusion into initial teacher education curricula

While, as discussed above, data reveal a need for greater teacher training with respect to teaching in diverse classrooms, examples of content relating to equity, inclusion and diversity and inclusion can be found in ITE curricula in several education systems across the OECD. Dedicated, ad hoc courses on topics related to diversity, equity and inclusion – such as multicultural education and urban education – have increasingly been integrated into ITE curricula in various states across the United States for instance, along with community-based activities in diverse school settings (Brussino, 2021[16]; Mule, 2010[55]; Yuan, 2017[56]). Standalone courses related to diversity, equity and inclusion can also be found in the curricula of ITE programmes in several European countries (Brussino, 2021[16]; European Commission, Directorate-General for Education, Youth, Sport and Culture, 2017[57]). In Germany, for instance, prospective teachers are able to select two courses on SEN as part of ITE (Brussino, 2020[11]). In Denmark, the mandatory ITE module "Teaching bilingual children" "aims to prepare all student teachers to teach bilingual children and to deal with the identification of second language educational challenges in the teaching of subject knowledge" (European Commission, Directorate-General for Education, Youth, Sport and Culture, 2017, p. 62[57]).

In addition to standalone theoretical courses and modules, training on teaching in diverse settings has also been incorporated into ITE curricula through specific practical activities and programmes that encourage prospective teachers to critically reflect on their own worldviews or biases. In Melbourne, Australia, for example, the *eTutor* programme piloted by the RMIT School of Education aimed to strengthen pre-service teachers' capacity to teach in multicultural environments by creating an online space in which they could interact and engage in dialogue with students from other cultures (Gottschalk and Weise, Forthcoming[58]). An evaluation of the programme revealed that these interactions helped shift the attitudes of many of the pre-service teachers who participated and promoted greater understanding and empathy for students from diverse cultural backgrounds (ibid.). In the United States, the Persona Doll Project was a semester-long practical exercise undertaken by undergraduate pre-service teachers as part of an early childhood teaching programme (Brussino, 2021[16]; Logue, Bennett-Armistead and Kim, 2011[59]). Each student was given a persona doll with backgrounds and life experiences different to their own and was required to act as an advocate for the child personified by the doll, using storytelling to inform other students in the course of issues related to diversity, equity and inclusion associated with the doll's identity. The project helped promote awareness among pre-service teachers of their own assumptions along with improved understanding as to how different teaching strategies can promote inclusion in the classroom, with the students reporting greater confidence in teaching in diverse settings after having participated in the project (Logue, Bennett-Armistead and Kim, 2011[59]; Brussino, 2021[16]).

Incorporating hands-on classroom experience in ITE is key in preparing prospective teachers for classroom diversity, as it allows practical prospective teachers to become familiar with classroom dynamics, connect pedagogical theories to classroom practices and anticipate the challenges they might face in schools (Brussino, 2021[16]; Musset, 2010[60]; OECD, 2019[61]; European Commission, Directorate-General for Education, Youth, Sport and Culture, 2017[57]). Indeed, research indicates that practical experiences in diverse environments can have positive impacts on student teachers, helping them to reflect on and question their values and attitudes as well as supporting the acquisition of knowledge and competences

relating to diversity, equity and inclusion in education (European Commission, Directorate-General for Education, Youth, Sport and Culture, 2017[57]). Structured field experiences, for instance, have been recognised as helping to foster prospective teachers' cultural awareness, when combined with opportunities for meaningful reflection (Acquah and Commins, 2017[62]). In Australia, students enrolled in the Master of Teaching programme at the University of Melbourne who are interested in teaching in regional or remote areas of Australia have the opportunity to develop their expertise in working with Indigenous students and communities through the "Place Based Elective". The Elective includes a professional practice component, where student teachers live and work with an Indigenous community, and an on-campus learning component, where student teachers develop their knowledge and skills in this area by engaging with the research literature and sharing their learning experiences with others (The University of Melbourne, 2022[63]). In the United States, the School of Education at Indiana University offers several cultural immersion programmes that provide pre-service teachers with the opportunity to develop their skills in teaching students from different ethnic and cultural backgrounds (Cerna et al., 2019[64]). Placements include the American Indian Reservation in the Navajo Nation, the Hispanic Community in the lower Rio Grande Valley, urban settings in Indianapolis and Chicago, and multiple international locations in Latin America, Europe, Asia and Africa. Studies on the programme have highlighted its positive impacts in terms of shifts in pre-service teachers' consciousness and perspectives, as well as their appreciation for other cultures and awareness of diversity at both the global and the domestic level (ibid.).

Incorporating equity and inclusion as part of the specified objectives and competences for initial teacher education

Despite research suggesting that ITE is more effective in preparing teachers for inclusive teaching where equity and inclusion are embedded into the curriculum as central and cross-cutting themes, ITE training on these concepts currently tends to be limited to standalone, ad hoc courses addressing specific dimensions of diversity, if it features at all (Rouse and Florian, 2021[65]; UNESCO, 2020[66]).

A way in which education systems can seek to address this issue is by incorporating knowledge and skills related to diversity, equity and inclusion within the competence frameworks or standards that set out what prospective teachers are required to demonstrate at the completion of ITE. As competence frameworks and teacher standards can influence the content that is taught in ITE, this may be a way of ensuring that prospective teachers are equipped with at least some of the necessary competences to respond to the needs of diverse learners before entering the classroom (OECD, 2022[24]), though further research is required to ascertain how effective this is in practice. The Teachers' Standards in England (United Kingdom), for instance, specify that both trainee and practising teachers must (Department for Education, 2021[67]):

i. know when and how to differentiate appropriately, using approaches that enable pupils to be taught effectively;
ii. have a secure understanding of how a range of factors can inhibit pupils' ability to learn and how best to overcome these; and
iii. have a clear understanding of the needs of all pupils, including those with SEN, those of high ability, those with English as an additional language, those with disabilities; and be able to use and evaluate distinctive teaching approaches to engage and support them.

Similarly, the Australian Professional Standards for Teachers (APST), which prospective teachers must satisfy in order to obtain their ITE qualification, require prospective teachers to show that they have a solid understanding of diversity and inclusion in the classroom and are prepared to address diverse students' needs and learning styles through differentiated instruction. They include specific standards relating to teaching students with SEN, as well as specifying what teachers should know and be able to demonstrate in relation to teaching Indigenous students and in terms of teaching Indigenous languages and culture to all students (AITSL, 2011[68]; OECD, 2017[18]; OECD, 2022[24]; Révai, 2018[69]). In Austria, student teachers

must demonstrate that they have the pedagogical competences and knowledge to teach students with various needs in order to be able to graduate from the Upper Austria College of Education. Reflecting this, inclusive content is embedded in each subject of the ITE curriculum (UNESCO, 2020[66]).

More generally, the competence frameworks for ITE in Estonia and Latvia include skills and knowledge related to the development of co-operative learning environments based on student needs and abilities and the operationalisation of the values of tolerance and human rights (European Commission, Directorate-General for Education, Youth, Sport and Culture, 2017[57]; Brussino, 2021[16]).

While further research is required as to the effectiveness of this strategy, it is envisaged that the extent to which incorporating diversity and inclusion into competence frameworks influences ITE curricula in practice will depend on how clearly and specifically the standards or competences are framed.

Graduating teacher standards or competence frameworks may operationalise or reflect policy objectives for ITE that are defined at the system level (Brussino, 2021[16]). Several countries have developed explicit objectives for ITE that relate to preparing prospective teachers to respond to diversity and/or advance equity and inclusion (European Commission, Directorate-General for Education, Youth, Sport and Culture, 2017[57]). In Norway, for instance, the values of "equality and solidarity" and "insight into cultural diversity" are explicitly promoted within the National Framework Curriculum for Teacher Education, and the Education Act for Primary and Secondary Education and Training specifies diversity as one of the main objectives for ITE (Brussino, 2021[16]; European Commission, Directorate-General for Education, Youth, Sport and Culture, 2017[57]). The Teaching Council of Ireland also includes diversity and inclusion among the objectives it specifies for ITE in its "Initial Teacher Education: Criteria and Guidelines for Programme Providers" (Brussino, 2021[16]; The Teaching Council, 2017[70]). Less explicitly, the general objectives listed for ITE in the Netherlands include promoting prospective teachers' understanding, respect and critical thinking (Brussino, 2021[16]; European Commission, Directorate-General for Education, Youth, Sport and Culture, 2017[57]).

Fostering equitable and inclusive teaching through continuous professional learning

Initial teacher education alone cannot fully prepare teachers for their profession (OECD, 2022[24]). Certain skills and pedagogical strategies are also better learnt in the classroom while teaching (Brussino, 2021[16]). Continuous professional learning enables teachers to refresh, develop and broaden their knowledge, and to keep abreast with evolving research and practices regarding equity and inclusion in education (OECD, 2022[24]). Researchers and international organisations have recognised the crucial value of continuous professional learning both in relation to teacher quality generally (LeCzel, 2004[71]; Leu, 2004[72]; O'Grady, 2000[73]; OECD, 2022[47]; OECD, 2019[45]) and more specifically in ensuring that teachers are able to meet diverse student needs and create environments that support all learners (UNESCO, 2017[74]). Continuous professional learning is also important to expand teachers' skills and knowledge in a context of growing student diversity and in preparation for unforeseen events and developments, as was highlighted by the COVID-19 pandemic (OECD, 2022[24]).

Formal continuous professional learning

Formal continuous professional learning related to diversity, equity and inclusion can be provided in a variety of ways, including through seminars, courses, workshops, conferences and online training, and may be delivered or supervised by a range of actors, including official government institutions, external private providers and non-governmental organisations (Brussino, 2021[16]). Examples of formal continuous professional learning on various specific dimensions of diversity can be found in several OECD education systems. In Italy, for example, teachers undertake in-service training on teaching students with SEN co-designed by the Ministry of Education, University and Research in partnership with the particular school. Research institutes, scientific organisations, associations and local health authorities sometimes play a role in delivering some of the specific training activities (Brussino, 2021[16]; European Agency for Special

Needs and Inclusive Education, 2021[75]). In New Zealand, *Te Ahu o te Reo Māori* is a three-month programme funded by the Ministry of Education and delivered by four external providers to develop teachers' competencies in Indigenous language and in incorporating Indigenous language and culture in the classroom (Kral et al., 2021[76]). Following the programme's pilot in 2020, participants reported significant improvements in their level of confidence in using Indigenous language in their everyday teaching and in their abilities to engage with Indigenous families and communities (Kral et al., 2021[76]). In Greece, the Ministry of Education and Religious Affairs has partnered with the European Wergeland Centre (a resource centre established by the Council of Europe and Norway) to provide training for teachers as part of the project Schools for All – Integration of Refugee Students in Greek Schools (Koehler, Palaiologou and Brussino, 2022[14]; The European Wergeland Centre, n.d.[77]). Experienced trainers deliver training and provide mentoring throughout the school year to equip teachers and school leaders with the competences, tools and confidence to create safe and inclusive learning environments where refugee students are welcomed (The European Wergeland Centre, n.d.[77]).

Online training modules and courses are also offered in several OECD education systems to help prepare teachers and school staff to address diverse student needs and support all learners. In New Brunswick, Canada, an online continuous professional learning course on teaching in culturally and linguistically diverse settings is available to help equip teachers to implement inclusive pedagogy for students with an immigrant background, students belonging to ethnic or national minorities, and Indigenous students (Gottschalk and Weise, Forthcoming[58]). In England (United Kingdom), the government has developed an online portal to improve access to continuous professional learning material on teaching students with SEN, which includes a resource library with materials on teaching students with SEN in mainstream settings (Brussino, 2020[11]; United Kingdom Department for Education, 2014[78]). In addition to training related to specific dimensions of diversity, examples of online learning programmes addressing diversity, equity and inclusion more broadly can also be found in several education systems. Online training programmes have, for instance, been developed in the Flemish Community of Belgium and Sweden to encourage and support teachers to effectively use digital tools in the classroom to increase accessibility of learning opportunities and tailor learning to the specific needs of students (Gottschalk and Weise, Forthcoming[58]). In Italy and Spain, the Erasmus Training Academy offers online continuous professional learning courses for teachers on topics such as enhancing diversity and tolerance in the classroom, addressing prejudice and discrimination, preventing conflict and early school leaving, and promoting socio-emotional learning (Brussino, 2021[16]; Erasmus+ School Education Gateway, n.d.[79]).

Non-governmental organisations (NGOs) can play a key role in some contexts in providing continuous professional learning regarding how teachers can support and serve the needs of specific diverse groups. Non-governmental organisations frequently develop training material and provide courses and programmes for teachers and school staff, sometimes funded by or in partnership with government or official institutions. In Portugal, for example, the National Association for the Study of and Intervention in Giftedness offers training courses to educational staff and supports school leaders and teachers in the implementation of personalised programmes for gifted learners (National Association for the Study and Intervention of Giftedness, n.d.[80]; Rutigliano and Quarshie, 2021[5]). Government departments in Ireland and Sweden have also collaborated with NGOs specialising in LGBTQI+ issues to develop seminars for teachers (Irish Department of Children and Youth Affairs, 2018[81]; McBrien, Rutigliano and Sticca, 2022[39]; Swedish National Agency for Education, 2022[82]), while, in France, several LGBTQI-focused NGOs have received official government accreditation to provide training for teachers (IGLYO, 2022[83]). There are also several examples of NGOs providing training to teachers in relation to addressing the needs of refugee students. The Support for Newcomer Education (*Ondersteuning Onderwijs Nieuwkomers*) programme run by the organisation LOWAN in the Netherlands, for example, includes the provision of training programmes in selected schools to equip teachers with the skills to be able to effectively welcome refugee and newcomer students, assess their needs and select the most appropriate teaching strategies. The programme is subsidised by the Dutch Ministry of Education (Koehler, Palaiologou and Brussino, 2022[14]).

While NGOs may have strong expertise with respect to the experiences of and issues faced by specific diverse groups and individuals, they may lack the requisite knowledge to effectively translate what these experiences and issues mean in terms of educational strategies and practices (Dankmeijer, 2008[84]; McBrien, Rutigliano and Sticca, 2022[39]). Partnerships between educational institutions or ministries and NGOs may therefore be more effective in terms of enabling teachers and school staff to benefit from the particular expertise provided, though further research is required in this respect. Collaboration between NGOs and central or local authorities can also foster the upscaling of effective programmes (see Chapter 6). This has been identified as one of the key elements, for instance, in the upscaling and/or institutionalisation process of inclusive education initiatives for refugee and newcomer students, including the LOWAN programme referred to above (Koehler, Palaiologou and Brussino, 2022[14]).

Supporting teachers' participation in continuous professional learning

To ensure all teachers are able to improve their knowledge and skills for equitable and inclusive teaching, it is important to address barriers that may hinder or discourage participation in continuous professional learning (OECD, 2022[24]). This may be particularly crucial in education systems where continuous professional learning is not mandatory for teachers.[1] Two important aspects in this respect are ensuring that teachers have dedicated time to engage in continuous professional learning and that financial costs do not hinder or discourage them in doing so (OECD, 2022[24]; OECD, 2022[47]). In the French Community of Belgium, teachers are entitled to take six half-days of working time per year to engage in continuous professional learning (European Commission/EACEA/Eurydice, 2021[85]). Similarly, in Victoria, Australia, each teacher is entitled to four dedicated days per year to engage in continuous professional learning to improve their teaching (OECD, 2022[24]). School-wide professional learning days have also been implemented in several OECD education systems as a way to ensure dedicated time to professional learning, to complement teachers' self-directed or individual learning, and to advance school improvement (ibid.). In New Zealand, for instance, the most recent collective agreement between the government and the main teaching unions provides for eight "Teacher-Only Days" during term time, which are supported by guidelines and resources developed at the national level (OECD, 2022[24]). In terms of addressing potential costs associated with continuous professional learning, Norway provides financial support to teachers engaging in professional learning on priority topics as part of a new model for teachers' in-service competence development that was introduced in 2017 (Boeskens, Nusche and Yurita, 2020[86]).

Seeking teachers' feedback and views and monitoring their progress and participation is crucial to ensure that the training that is offered meets their needs and is effective in equipping them to create equitable and inclusive learning environments in a context of increasing diversity. Teacher questionnaires can be a useful tool in assessing teachers' needs and how well prepared they feel to implement inclusive teaching practices. The TALIS questions concerning teachers' feelings of self-efficacy in teaching in a multicultural setting could be expanded to consider other dimensions of diversity and used by schools as teacher self-evaluation tools to prompt reflection on their abilities and areas of need for further training (Mezzanotte and Calvel, Forthcoming[87]). In Alberta, Canada, for example, tailored questions on teachers' feelings of preparedness regarding teaching Indigenous curriculum content were added to the OECD 2013 TALIS survey (OECD, 2017[18]). Research has shown that giving teachers opportunities to influence the substance and process of professional learning can also help to facilitate a sense of ownership and enable teachers to connect what they have learnt to the specific context of their school (Forghani-Arani, Cerna and Bannon, 2019[15]; King and Newmann, 2000[88]). In light of this, it is important to give teachers a say in shaping both the types of programmes that are offered and their professional learning pathway, through, for instance, ensuring representation of active teachers on the relevant body or bodies that set the professional learning offering (OECD, 2022[24]). Teachers should further be supported to effectively transfer and assimilate the new ideas and knowledge they have acquired through continuous professional learning into their classroom practice (ibid.). An inclusive school leadership and management that promotes a culture of collaboration (see below) plays a crucial role in this respect.

In addition to more formal continuous learning programmes and projects, horizontal and collaborative continuous professional learning initiatives bringing together evidence-informed pedagogical theories and classroom practices are also emerging in some OECD education systems as a way of preparing and supporting teachers to foster equitable and inclusive learning environments (Brussino, 2021[16]). If implemented effectively and well-supported, collaboration can lead to increased teacher job satisfaction and improve teachers' capacity for equitable and inclusive teaching through the transferring and sharing of knowledge and experiences (OECD, 2022[24]; OECD, 2022[47]). Alberta and Ontario in Canada are two examples of education systems where in-school collaboration is actively promoted and implemented through a range of activities (Box 4.1).

Box 4.1. Fostering in-school collaboration in Alberta and Ontario (Canada)

Alberta

The Alberta Teachers' Association, which plays a key role in teachers' continuous professional learning, has shifted its focus from individualised professional learning to more collaborative school-based activities that foster co-operation and encourage critical reflection. Some of the activities facilitated or proposed by the Association as part of this include:

- **Action research:** This involves teachers asking how a current practice might be improved and then studying the relevant research to select a potential approach. Teachers use their classrooms as research sites by investigating their own teaching through experiments to see what is effective in facilitating co-operative learning among students.
- **Classroom and school visits:** Teachers are encouraged to visit colleagues teaching in other classrooms to view innovative teaching practices, and expand and refine their own pedagogical strategies.
- **Collaborative curriculum development:** By working together, teachers design new planning materials, teaching methods, resource materials and assessment tools, and they can delve deeply into their subject matter.

Ontario

As part of its efforts in supporting teacher collaboration, the Ontario Ministry of Education has produced a series of "Capacity Building" briefs that share actionable strategies that teachers and school leaders can implement to improve their practice. The Ministry promotes a process of "collaborative inquiry" in which teachers work with other teachers from their school to research problems of practice. In teams, teachers generate evidence of what is and is not working at their school, make decisions about interventions, take action and then evaluate the effectiveness of their intervention before repeating the cycle. Teachers are encouraged to participate in a range of learning activities applying this process. These include:

- **Co-teaching classes**: In small groups, teachers work together to plan a lesson and then co-teach that lesson with assigned roles, reflecting on the student learning outcomes of the learning experience, including naming evidence of the impact on student learning.
- **Collaboratively assessing student work**: Teachers collaboratively discuss student work based on common assessment criteria.
- **Monitoring marker students:** Teachers pick a small number of students in a class, grade or school, share their assessment results with others in the school, and document the use of teaching strategies against the learning outcomes for these students.

Sources: The Alberta Teachers' Association (2022[89]), PD Activities for Professional Growth, https://www.teachers.ab.ca/For%20Members/ProfessionalGrowth/Section%203/Pages/Professional%20Development%20Activities%20for%20Teachers.aspx (accessed 8 June 2022); Nusche, et al. (2016[90]), OECD Reviews of School Resources: Denmark 2016, http://dx.doi.org/10.1787/9789264262430-en; Ontario Ministry of Education (2014[91]), Capability Building Series: Collaborative Inquiry in Ontario, https://thelearningexchange.ca/wpcontent/uploads/2017/02/CBS_CollaborativeInquiry.pdf (accessed 22 November 2018); Deming (2018[92]), The New Economics: For Industry, Government, Education, MIT Press.

Collaborative approaches can play an important role in supporting equitable and inclusive teaching practices through promoting the sharing of knowledge and strategies among teachers (Brussino, 2021[16]; OECD, 2022[47]). In particular, "professional learning communities" can serve as effective tools in supporting the development of teachers' knowledge and competences to address and support all students' needs by providing informal environments for mutual learning and reflection (Alhanachi, de Meijer and Severiens, 2021[93]; Brussino, 2021[16]; Lardner, 2003[94]). The Life is Diversity (*Leben ist Vielfalt*) network, for instance, was initiated by pre- and in-service teachers in the North Rhine-Westphalia region of Germany and organises regular workshops, seminars and meetings for teachers on topics such as addressing unconscious bias, intercultural classroom teaching strategies and multilingualism in the classroom. Feedback received indicates that stakeholders consider that the network has had positive impacts in terms of increasing teachers' intercultural sensitivity as well as their preparedness and self-confidence to teach in diverse classrooms (Cerna et al., 2019[64]; European Commission, Directorate-General for Education, Youth, Sport and Culture, 2017[57]; Universität Paderborn (Paderborn University), 2016[95]). Similarly, "On the Shoulders of Giants" is a bottom-up professional learning community initiated by a group of teachers in Valencia, Spain, that organises monthly seminars where teachers come together to discuss research and share their experiences on strategies to improve students' learning. Data collected as part of an evaluation suggested that participating in the programme had improved teachers' practices and attitudes towards continuous professional learning, as well as encouraging collaboration and knowledge sharing among teachers (Rodriguez, 2020[96]). In New Zealand, Communities of Learning is a country-wide initiative in which schools work together to develop educational environments' that are responsive to students' different learning paths and promote equitable education outcomes for Indigenous students and students with SEN (Annan and Carpenter, 2015[97]; OECD, 2017[18]).

Collaborative teaching is another professional learning strategy that can support teachers in addressing and serving diverse students' needs. Collaborative teaching has traditionally involved general education teachers working in tandem with special education teachers (Varsik and Gorochovskij, Forthcoming[50]). This strategy utilises the presence of a special education teacher to assist in planning lessons, teaching or evaluating student progress, while holding all students to the same educational standards. While all students learn the same content, teachers have more leeway to address students' specific needs (Morin, n.d.[98]; Varsik and Gorochovskij, Forthcoming[50]). The Federation University in Australia offers a resource pack for teachers who wish to adopt this teaching style with a colleague, providing guidance on how to formulate clear teaching team roles and responsibilities, develop effective communication strategies to maximise teaching, and identify complexities and variables in managing team workflows (Federation University, 2022[99]; Varsik and Gorochovskij, Forthcoming[50]). For students with SEN, being in a co-taught classroom can be beneficial as it allows students to spend more time with and receive more individual attention from teachers (Mezzanotte, 2020[12]; Morin, 2019[100]). Beyond addressing SEN, collaborative teaching partnerships have also been implemented to help prepare and support teachers in teaching Indigenous language and culture. In Chile, for example, collaborative teaching is a strategy adopted as part of the country's Programme for Intercultural Bilingual Education to incorporate Indigenous language subjects into the curriculum. Schools form a pedagogical team made up of a traditional teacher and a mentor teacher, with the former bringing knowledge of Indigenous language and culture and the latter providing pedagogical skills and knowledge of the educational system (Santiago et al., 2017[101]).

Dedicated advisory or support workers can provide valuable support and guidance to teachers and school leaders in supporting the learning and well-being of diverse students. Learning support teachers are, for

instance, used in several education systems to support students with SEN. Support teachers focus on the provision of supplementary teaching to students who require additional help (Mezzanotte, 2020[12]). Cultural mediators with a Roma background are also employed in a number of European countries to both support and increase the performance of Roma students and improve their well-being, as well as to build trust and sustained relationships between schools and Roma families (Rutigliano, 2020[102]). Similarly, an increasing trend in Chile is the use of language facilitators to provide mother tongue language support in mainstream classrooms and to facilitate relationships between schools and parents and guardians who may not speak Spanish (Guthrie et al., 2019[103]). In Canada, dedicated Indigenous support staff work directly with teachers on their teaching strategies and practices, lead improvements in the curriculum and learning activities to build cultural competencies, and serve as a connecting point with Indigenous parents (OECD, 2017[18]).

To be effective, collaborative initiatives both within and across schools need to be supported by both pedagogical leadership and resources (OECD, 2022[24]). This can be facilitated at the system level through, for instance, regulating teachers' working time in a way that provides space for collaborative learning, funding or additional staff resources, and/or official guidance (ibid.). In Austria, for instance, the New Secondary School Reform has led to a variety of measures to facilitate and support teachers' collaboration. These include the creation of new roles within schools and the introduction of a team teaching approach, which, in addition to allowing teachers within schools to learn from each other by working together, enables teachers from different schools and education levels to come together and share best practices (Nusche et al., 2016[90]; OECD, 2022[24]). Korea also encourages the sharing of knowledge among teachers by funding action research by teachers and counting these efforts towards their professional development requirements. Funding is made available to individual schools and to groups of teachers from across several schools who wish to undertake joint research (OECD, 2014[104]). In Australia, the Department of Education and Training in the state of Victoria has developed guidelines and resources to support schools in developing professional learning communities to facilitate teachers' and school leaders' engagement in team learning. These include a Framework for Improving Student Outcomes, which encourage teachers and school leaders to make use of student learning data to design and implement differentiation strategies to support individual students' needs (Brussino, 2021[16]; State of Victoria Department of Education, 2020[105]).

Designing and implementing teacher evaluation for equitable and inclusive teaching

Using teacher evaluation to promote and support teachers' learning

Teacher evaluation processes can serve as a key tool in preparing and supporting teachers to address the needs of all learners and promote equity and inclusion in education. To enable them to fulfil this function, it is important that they are designed and implemented in a way that supports and encourages teachers to acquire the competences and knowledge necessary for equitable and inclusive teaching (Brussino, 2021[16]). Frameworks for teacher evaluation in relation to diversity, equity and inclusion are, however, currently lacking in many education systems across the OECD (Brussino, 2021[16]). More generally, data from the TALIS 2018 survey suggest there is a need across the OECD to improve teacher evaluation processes so that they better support and promote teachers' learning and development, as only 55% of teachers who had reported receiving feedback considered that it had led to a positive change in their competencies (OECD, 2019[45]).

Clear and well-structured teaching standards are a powerful mechanism to define what constitutes good teaching and to align the various elements involved in developing teachers' knowledge and skills (OECD, 2005[106]), and can thus serve as a reference point for school-level teacher evaluations (Révai, 2018[69]; OECD, 2022[24]). Incorporating competences and knowledge related to diversity, equity and inclusion into teaching standards is therefore a key strategy to ensure that teacher evaluations are more effective as a tool in preparing and supporting teachers for inclusive teaching. New Zealand and Australia offer examples

of how diversity and inclusion can be incorporated into teacher professional standards and, more broadly, of how teacher appraisal processes can be designed and implemented to support and promote teachers' professional learning (see Box 4.2).

Box 4.2. Standards to promote teachers' professional learning in Australia and New Zealand

Australia: Professional Standards for Teachers and Teacher Self-Assessment Tool

The Australian Professional Standards for Teachers (APST) inform teachers' voluntary certification for advanced teaching career stages and provide a framework to assist in planning teachers' on-going professional learning. The APST consist of seven standards, which teachers have to meet at different levels (graduate, proficient, highly accomplished and lead), depending on their career stage and level of experience. Within each Standard, focus areas set out what teachers are required to demonstrate in terms of knowledge, practice and professional engagement. Some of the focus areas specifically concern what teachers are required to show to support the inclusion of diverse students, including students with diverse linguistic, cultural, religious and socio-economic backgrounds; Aboriginal and Torres Strait Islander students; and students with disabilities. More broadly, the APST also contain specific standards in relation to differentiated teaching and the creation of inclusive learning environments.

New Zealand: Professional Growth Cycle for Teachers

In early 2021, New Zealand began to implement the Professional Growth Cycle for Teachers in substitution of its former teacher performance appraisal system. Through a holistic approach centred on professional growth and school-staff collaboration, the cycle aims to focus how teachers meet and implement the Code of Professional Responsibility and Standards for the Teaching Profession in their daily teaching practices. The Standards include developing a culture "characterised by respect, inclusion, and empathy", understanding each student's "strengths, interests, needs, identities, languages and cultures", and implementing adaptive teaching. School leaders design teachers' annual cycle of professional growth based on the Standards (in collaboration with the teacher) and support teachers in engaging with the professional growth cycle throughout the school year. School leaders provide teachers with a statement at the end of the school year as to whether they meet these standards and support teachers in the areas identified for improvement.

Sources: Australian Institute for Teaching and School Leadership (n.d.[107]), Understand the Teacher Standards, https://www.aitsl.edu.au/teach/standards/understand-the-teacher-standards (accessed 13 April 2022); Australian Institute for Teaching and School Leadership (n.d.[108]), Documentary evidence examples – Proficient teachers, Education Services Australia https://www.aitsl.edu.au/docs/defaultsource/general/documentary_evidence_proficient_teachers.pdf?sfvrsn=d90ce33c_0 (accessed 09 June 2022); Teaching Council of Aotearoa New Zealand (2021[109]), Professional Growth Cycle, https://teachingcouncil.nz/faqs/faqs-professional-growth-cycle/ (accessed 09 June 2022).

Researchers in the United States, together with the American Federation of Teachers and five school districts, have developed a set of principles that can serve as a basis for reflection on how evaluations can be designed in a way that promotes teachers' development with respect to equitable and inclusive teaching practices (Brussino, 2021[16]; Fenner, Kozik and Cooper, 2017[110]).

i. **Committing to equal access for all students:** Teachers know and share the laws and regulations to provide full and equal access to public education for all. Teachers outline the needs of all students, including those with unique learning needs, and how these needs are included and met in the classroom.

ii. **Preparing to support diverse students:** Teachers show knowledge and understanding of individual students' experiences and identities, and value diversity as an asset. Strategies to

support individual needs and learning styles are implemented along the rationale of individualisation included in the Universal Design for Learning (see Chapter 5).

iii. **Evidence-based reflective teaching:** Teaching practices are adapted to students' needs and identities through individualised, student-centred approaches. These are appropriately challenging and founded upon evidence-based practices.

iv. **Promoting a collaborative classroom environment with a sense of community:** Teachers engage in creating active and solid partnerships with diverse stakeholders, including students, families, teachers and other community services.

Classroom observation and post-observation feedback can be effective in improving teachers' teaching practices, both through enabling teachers to receive post-observation feedback from peers and to learn by observing other teachers (Brussino, 2021[16]; Hendry, Bell and Thomson, 2014[111]). Peer observation can be particularly important in supporting the development of equitable and inclusive teaching strategies among teachers, and for this reason is a common feature of professional learning communities (Brussino, 2021[16]). Despite growing interest in peer observation, observing other teachers and providing post-observation feedback is not yet a mainstream practice across OECD countries (ibid.). Indeed, on average across OECD countries, only 15% of teachers in PISA 2018 reported providing feedback based on their observation of other teachers more than four times per year (OECD, 2020[46]). There are, however, examples of policies and practices to promote peer observation in some OECD education systems, which can be useful in informing the further development and facilitation of peer observation processes among teachers (Brussino, 2021[16]). In Canada, for instance, the University of Toronto has developed guidelines to mainstream peer observation across its faculty members, which include "Creating an inclusive classroom" as one of the key observation areas. The guidelines set out how different peer observation models can be used to assess various aspects of teaching in terms of diversity and inclusion (Brussino, 2021[16]; Centre for Teaching Support & Innovation, 2017[112]). The Department of Education and Training in Victoria, Australia, has also published a guide to support the implementation and embedding of peer observation in schools, in line with its focus on creating a culture of working collaboratively to continuously improve teaching and learning (State of Victoria Department of Education and Training, 2018[113]). As a starting point for planning peer observations, the guide sets out a series of instructional strategies thar promote student learning which include "differentiated teaching to extent the knowledge and skills of every student in the class, regardless of their starting point" (ibid.).

Ensuring teachers are fairly evaluated

A further issue to be addressed in relation to teacher evaluation is the fact that evidence indicates that diverse teacher groups and teachers working in disadvantaged schools tend to score disproportionately lower in teacher evaluations (Bailey et al., 2016[114]). This can involve a degree of rater or evaluator bias (i.e., the tendency of raters to be influenced by non-performance factors when rating), which has long been recognised as an issue in teacher evaluation or appraisal processes (Milanowski, 2017[115]). Evaluators' perceptions of teacher performance may, for instance, be influenced by stereotypes or preconceptions regarding certain groups or by the socio-economic profile of the students being taught (ibid.). Tying teacher performance ratings to student performance is another issue in teacher evaluation processes that raises concerns from an equity perspective. As students' socio-economic status impacts on their academic performance (Ikeda, 2022[116]), tying teacher ratings to student performance can discriminate against teachers working in disadvantaged schools (Brussino, 2021[16]; Newton et al., 2010[117]), in which, as discussed above, teachers from diverse backgrounds are often over-represented. As teacher evaluation can affect tenure, progression and pay, bias in teacher evaluation processes can further be a driver in teacher turnover (Johnson, 2015[118]; Brussino, 2021[16]) and thus impact on the diversity and inclusivity of the teacher workforce.

Further research is needed regarding strategies that are effective in addressing evaluators' bias in teacher evaluation processes (Brussino, 2021[16]). Training teacher evaluators on how to recognise and address conscious and unconscious bias in the classroom is, however, likely to be a key element. Avoiding bias and reporting evidence in an objective manner are among the areas on which prospective evaluators are trained and assessed in the Cincinnati Public Schools District in Ohio, the United States. Prospective evaluators complete a rigorous training programme, which includes undertaking live teacher evaluations in partnership with a qualified mentor (Leahy, 2012[119]).

Addressing equity issues associated with tying teacher evaluation to student performance is complex, with diverse factors falling to be considered. One potential strategy to improve fairness towards teachers working in more disadvantaged settings is to adjust evaluation ratings depending on classroom composition characteristics (Milanowski, 2017[115]). The National System for Performance Evaluation in Chile (*Sistema Nacional de Evaluación de Desempeño*), for example, is structured in a way that takes into account the characteristics of the school in determining the financial awards for teachers (Brussino, 2021[16]; Santiago et al., 2017[101]). The System evaluates school performance on a range of specified, weighted factors, and rewards teachers and education assistants working in schools that perform well. To ensure greater fairness, schools in each region are ranked within groups of schools that are considered broadly comparable. The variables that are used to define the groups are: geographical area (urban or rural), level and type of education, position on the Schooling Vulnerability Index, average household income of students' families, and the average schooling level of students' parents or guardians (Santiago et al., 2017[101]).

Building capacity among school leaders to promote equity and inclusion

School leaders are key actors in shaping the ethos of schools and in ensuring that policies and legislation for equity and inclusion in education are carried into effect through practices tailored to the local context of the school and community (Cerna et al., 2021[1]; European Agency for Special Education Needs and Inclusive Education, 2021[120]; OECD, 2017[18]). From an equity perspective, school leadership has been recognised as an important factor in influencing student learning outcomes (OECD, 2022[2]), and the starting point for improving student achievement in disadvantaged schools (OECD, 2012[25]). School leadership also plays a crucial role in the development and implementation of inclusive instructional programme, as well as in creating collaborative school environments that promote inclusive teaching practices and serve the needs of all students (Brussino, 2021[16]; European Agency for Special Needs and Inclusive Education, 2020[121]; UNESCO, 2020[122]; OECD, 2022[24]). Indeed, an international literature review found that schools with inclusive cultures tended to have leaders who were "committed to inclusive values and to a leadership style that encourages a range of individuals to participate in leadership functions" (Ainscow and Sandill, 2010[123]).

Particular forms of leadership have been recognised as being effective in promoting equity and inclusion in schools through facilitating "more powerful forms of teaching and learning, creating strong communities of students, teachers and parents, and nurturing educational cultures among families" (Ainscow and Sandill, 2010[123]). The Supporting Inclusive School Leadership project developed by the European Agency for Special Needs and Inclusive Education identified three core functions of "inclusive school leadership" (i.e. leadership that promotes equity and inclusion in education) (European Agency for Special Education Needs and Inclusive Education, 2021[120]; European Agency for Special Needs and Inclusive Education, 2018[124]):

- **Setting direction**. This involves identifying and articulating a shared vision of inclusive education, setting expectations for staff and building acceptance of group goals in line with this vision, monitoring performance, and communicating with stakeholders.

- **Organisational development**. This involves creating and facilitating professional learning opportunities, supporting and motivating teachers, facilitating reflective practice, and focusing on learning.
- **Human development**. This involves creating and sustaining an inclusive school culture, developing collaborative practices, building partnerships with parents and the community, and distributing leadership roles.

According to the Supporting Inclusive School Leadership project, these core functions translate into a number of specific roles and responsibilities at the individual, school, community and system levels. These are set out in the table below (European Agency for Special Education Needs and Inclusive Education, 2021[120]).

Table 4.1. School leadership roles and responsibilities to promote equity and inclusion

Individual level	School level	Community level	System level
Support innovative and evidence-based pedagogies and practices in the classroom	Guide and influence the organisation of school resources in ways that promote equity	Build partnerships with support agencies and other schools in the community	Influence the development of system-level policies on equity and inclusion in education through consultation and communication
Monitor classroom practices	Engage the school community in self-review processes and reflect on data to inform on-going school improvement	Build school capacity to respond to diversity through research engagement and collaborative professional development activities (for example, with universities)	Translate and implement policies in ways appropriate to the particular school context, and manage school-level change relating to curriculum and assessment frameworks, professional development, funding and resource allocation, and quality analysis and accountability
Develop a culture of collaboration through promoting positive and trusting relationships	Provide and facilitate professional learning opportunities for school staff	Foster a sense of commitment to a shared vision of inclusion	
Use data to inform teachers' on-going professional learning	Ensure the curriculum and student assessment processes meet the needs of all learners	Manage financial resources to meet the needs of the whole school community	
Promote learner-centred teaching practices	Ensure that both staff and learners feel supported		
	Actively engage all families		

Source: Adapted from European Agency for Special Education Needs and Inclusive Education (2021[120]), Supporting Inclusive School Leadership: Policy Messages, https://www.european-agency.org/sites/default/files/SISL%20Policy%20Messages-EN.pdf (accessed 16 December 2022).

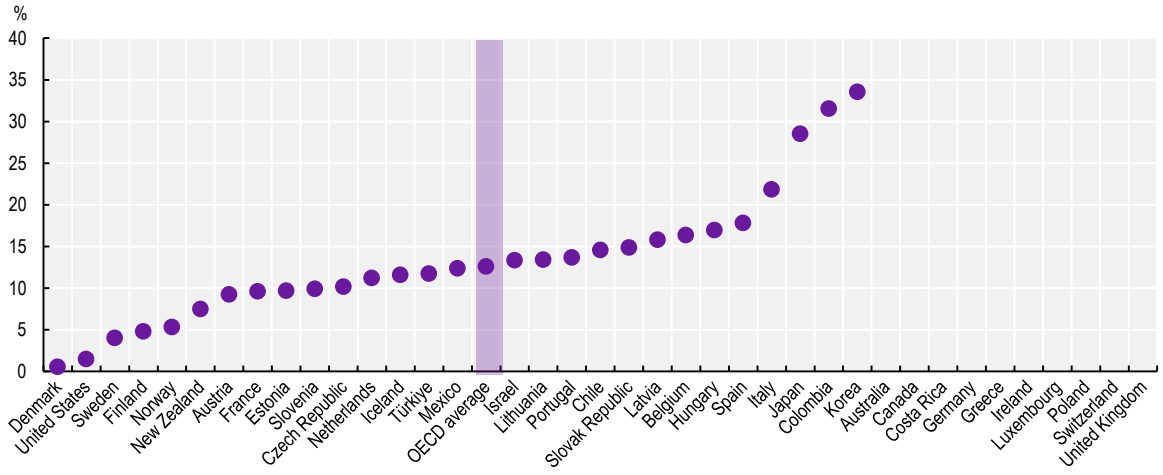
UNESCO has also emphasised the importance of school leaders being able to build consensus and a sense of commitment among the school community for implementing the values of equity and inclusion, and to establish an environment where stakeholders feel able to challenge discriminatory, inequitable and non-inclusive educational practices (OECD, 2022[47]; UNESCO, 2017[74]). This requires them to be able to analyse their own contexts, identify local barriers and facilitators, and to foster collaboration among school staff, among other competences. Previous OECD work has further highlighted the need for school leaders

to be equipped with the specialised competences and knowledge necessary to drive the improvement of student learning outcomes in disadvantaged schools (OECD, 2012[25]). These knowledge and competence areas include factors influencing student motivation and achievement, effective teaching strategies for disadvantaged and/or low performing students, fostering a positive and caring school culture, and engaging parents or guardians and the wider community as active allies for school improvement (OECD, 2012[25]).

To develop the knowledge and competences required to be able to promote equity and inclusion in education, school leaders need access to professional learning and resources, along with the support of and opportunities to collaborate with colleagues and other stakeholders (European Agency for Special Education Needs and Inclusive Education, 2021[120]). The OECD TALIS 2018 survey included a question on lower secondary school leaders' perceived need for professional development for "promoting diversity and equity". As shown in Figure 4.3 below, 13% of school leaders on average across the OECD reported a need for professional development in this area, though with variation across countries. 26% of school leaders (on average across the OECD) also reported a high need for professional development in developing collaboration among teachers and 24% reported a high need for training in using data for school improvement - (OECD, 2019[45]) – both of which have been identified among the roles and responsibilities of school leaders in promoting equity and inclusion in education (see Table 4.1) (European Agency for Special Education Needs and Inclusive Education, 2021[120]; UNESCO, 2020[122]).

Figure 4.3. Percentage of lower secondary school leaders reporting professional development needs for promoting diversity and equity

Based on school leaders' reports



Source: OECD (2020[125]), TALIS 2018 Results (Volume II): Teachers and School Leaders as Valued Professionals, Table I.5.32, https://doi.org/10.1787/19cf08df-en.

StatLink https://stat.link/3znao1

The School Leadership Toolkit published by the European Policy Network on School Leadership also notes that equity considerations are "relatively neglected" in school leadership training programmes, and emphasises the importance of redesigning school leaders' initial education and on-going learning curricula and activities to better "integrate methods and techniques for promoting fairness and inclusion in school practice" (European Policy Network on School Leadership, 2015[126]). In this vein, the Toolkit proposes a

set of five general principles for designing training programmes and activities so as to build school leaders' capacity for promoting equity and inclusion (European Policy Network on School Leadership, 2015[126]):

- School leadership programmes and activities should seek to develop school leaders' capacity for evidence-based critical reflection on the conditions and factors influencing teaching, learning and equity in the local context of their schools.
- School leadership programmes and activities should seek to promote a holistic approach to school leadership, which includes the attainment of both equity and learning goals.
- School leadership programmes and activities should stimulate the recognition of and reflection on diversity in students' perspectives, experiences, knowledge, values and ways of learning.
- School leadership programmes and activities should "[t]arget whole school leadership capacity building, focusing on democratic, collaborative and innovative school leadership methods".

A promising example of leadership training to promote equity and inclusion can be found in Estonia. Continuous professional learning programmes are being offered to school leaders (as well as teachers) as part of the "Inclusive School" pilot project launched by the Ministry of Education and Research in 2015. These programmes, which have the implementation of education as their cross-cutting priority, aim to improve the capacity of school leaders to respond to diverse learning needs and to foster students' individual development and creativity (European Agency for Special Needs and Inclusive Education, 2018[127]).

In addition to formal training and continuous professional learning programmes and activities, providing opportunities for school leaders to support, collaborate with and learn from one another can be an effective strategy to build capacity for promoting equity and inclusion (European Agency for Special Needs and Inclusive Education, 2020[121]; OECD, 2022[47]). In Iceland, all school leaders in the Akureyri municipality meet every month as part of a professional learning community to discuss practices and learn from each other (European Agency for Special Needs and Inclusive Education, 2020[121]). In Northern Ireland (United Kingdom), head teachers from schools in West Belfast, one of the country's most socio-economically disadvantaged communities, have established a professional learning community to improve student learning outcomes. School leaders work together to identify common issues and areas for improvement across all schools, establishing dedicated sub-groups to work on the specific points identified. School leaders also have the opportunity to visit schools where identified good practices are occurring, and can participate in joint training. The increased collaboration among schools has been associated with improvements in student learning outcomes (West Belfast Area Learning Community, n.d.[128]).

The importance of mutual learning and collaboration was highlighted in an action learning study carried out by Harris et al. (2017[129]) in the state of Queensland, Australia, in which school leaders from a network of schools came together to explore how school leadership could promote the interpretation and use of various forms of evidence to enhance equity in student learning. Through a series of network meetings and action learning projects, school leaders were able to discuss, reflect on and learn from one another's perspectives and experiences on how to promote more equitable learning outcomes for students. The leaders viewed one another as sources of mutual support and saw the action learning projects as a process through which their leadership practices could be strengthened (Harris et al., 2017[129]). In addition to learning from each other, school leaders had the opportunity to engage with the varied views of students, community members and university researchers in ways that challenged their existing practices and led to collaborations to promote more equitable learning outcomes (Harris et al., 2017[129]; OECD, 2022[47]). Collaboration between school leaders and university researchers is also a key aspect of Sweden's *Samverkan för bästa skola* (Collaboration for School Improvement) programme, which was established by the National Agency of Education to support schools with low student achievement scores and graduation rates in improving student learning outcomes (Glaés-Coutts and Nilsson, 2021[130]). As part of the programme, school leaders and school boards work in partnership with the National Agency for Education

and universities to develop school improvement plans, and receive guidance and support from university researchers in the plans' implementation (Glaés-Coutts and Nilsson, 2021[130]; Brussino, 2021[16]).

Coaching and mentoring programmes can also help ensure that new school leaders are supported in implementing best practices regarding equity and inclusion in education, while also enabling experienced school leaders to share their experiences and gain new insights (OECD, 2012[25]; European Agency for Special Needs and Inclusive Education, 2018[124]). Coaching and mentoring programmes involve pairing a novice school leaders with experienced school leaders, ideally from schools that share similar characteristics (such as socio-economic profile) (OECD, 2012[25]). They can play a key role in supporting school leaders to gain new skills and learn strategies to respond to their own school challenges (Gorham, Finn-Stevenson and Lapin, 2008[131]), as well as increasing their well-being (OECD, 2012[25]; Stichter and al, 2006[132]). In a study undertaken in Alberta and New Brunswick (Canada), mentoring was identified as being a key strategy to help school leaders working in culturally diverse schools acquire the skills and knowledge necessary to create inclusive learning environments. According to the study, those who are best placed to provide mentoring support to leaders working in diverse schools are those with a strong theoretical grounding in intercultural pedagogies and leadership approaches and professional experience working in culturally diverse contexts (Hamm, 2017[133]). Policies and/or official guidance at the system level can support the development of school leadership styles that promote equitable and inclusive learning. In New Brunswick, Canada, for example, Policy 322 establishes a series of specific requirements with the objective of ensuring that all New Brunswick public schools are inclusive (New Brunswick Department of Education and Early Childhood Development, 2013[134]). As part of this, the policy sets out what school leaders must do in providing leadership for inclusive schools. This includes fostering school- and community-level partnerships in order to achieve the growth goals specified in each student's personalised learning plan, as well as ensuring that all academic and behavioural interventions implemented within the school have the aim of supporting diverse students' needs and learning styles. In New Zealand, guidelines published by the New Zealand Schools Trustees Association outline the responsibilities of school management boards to lead inclusive schools (New Zealand Ministry of Education Te Tāhuhu o te Mātauranga, 2022[135]). The guidelines set out key areas of action for promoting diversity and more inclusive learning environments for all students (with a focus on students with SEN), providing guiding questions for boards to reflect on in their work (New Zealand School Trustees Association Te Whakarōputanga Kaitiaki Kura o Aotearoa, 2013[136]).

Recruiting and retaining teachers from diverse backgrounds

Ensuring diversity of school staff is crucial in creating more equitable and inclusive learning environments in which all students can thrive

Ensuring diversity of school staff has increasingly been considered an important policy lever in advancing equity and inclusion in a context of increasing student diversity (Brussino, 2020[11]). Enhancing diversity of school staff, especially teachers, can have positive impacts on multiple dimensions of student well-being, from learning to broader socio-emotional outcomes (Brussino, 2021[16]), both for students from particular diverse groups and for the student body as a whole (OECD, 2022[47]).

Positive impacts for diverse students

Research from the United States suggests several positive impacts of teacher-student congruence in terms of shared belonging to ethnic groups or national minorities (Brussino, 2021[16]). Black teacher-student ethnic congruence has been shown, for example, to have a small but significant positive impact on reading and mathematics performances across the United States (Clotfelter, Ladd and Vigdor, 2007[137]; Dee, 2004[138]; Egalite, Kisida and Winters, 2015[139]), particularly for lower-performing students (Egalite, Kisida and Winters, 2015[139]). Research also shows that having teachers with an immigrant background can

boost the overall academic performance and improve mathematics and reading test scores of students who also have an immigrant background (Carver-Thomas, 2018[140]; Carver-Thomas and Darling-Hammond, 2017[141]; Gershenson et al., 2022[142]; OECD, 2022[47]). Beyond improving academic outcomes, teacher-student ethnic congruence can also have positive impacts on students' well-being, engagement and participation in education. There is, for instance, an established body of research literature from the United States showing "how Black teachers contribute to the social and emotional development of their Black students" (Anderson, 1988[143]; Bristol and Martin-Fernandez, 2019[144]; Foster, 1997[145]; Ladson-Billings, 2009[146]). Assigning a Black male student to a Black teacher at a certain stage of primary education (ISCED level 1) has also been noted as appearing to have a significant effect on reducing the likelihood that the student drops out of school, particularly for students from lower socio-economic backgrounds (Gershenson et al., 2022[142]; Brussino, 2021[16]). Similarly, researchers in the United States have long documented how Latinx teachers can respond to and support the social and emotional needs of Latinx students, as well as their learning outcomes (Bristol and Martin-Fernandez, 2019[144]; López, 2016[22]; Ochoa, 2007[147]). Evidence from the United States further shows that teacher-student ethnic congruence (Delhommer, 2022[148]; Varsik and Gorochovskij, Forthcoming[50]; Bristol and Martin-Fernandez, 2019[144]) and congruence in terms of immigrant background (Carver-Thomas, 2018[140]; Carver-Thomas and Darling-Hammond, 2017[141]; Gershenson et al., 2022[142]; OECD, 2022[47]) can have positive impacts on upper secondary graduation rates and enrolment in higher education.

Teacher-student congruence in terms of gender has also been found to improve students' academic performance and teachers' perceptions of student performance and engagement (Dee, 2004[138]; Brussino, 2021[16]). However, this research is also limited to the United States. Further analysis from other educational contexts and with a more multi-dimensional and intersectional approach to diversity would be beneficial in deepening the understanding of the how teacher-student congruence can positively impact on the various dimensions of student well-being and thus promote equity and inclusion in education.

More generally, diverse teachers can serve as role models for[2] and can help instil a sense of belonging among students from diverse backgrounds or embodying a particular dimension of diversity. Teachers with disabilities can, for instance, be important role models for students with disabilities, particularly in light of the challenges they may have faced or overcome in their educational and professional life (Brussino, 2020[11]; Ferri, Keefe and Gregg, 2001[149]), as well as contributing to the deconstruction of negative representations of disability and the development of more positive attitudes towards persons with disabilities among the school population generally (Neca, Borges and Pinto, 2020[150]). In interviews conducted as part of an OECD study in Australia, Canada and New Zealand, some Indigenous students also emphasised the importance of having Indigenous school staff in terms of creating a sense of belonging among Indigenous students (OECD, 2017[18]). Similarly, the presence of LGBTQ+ teachers who are open at school about their sexual orientation and/or gender identity can serve as a source of support and may provide a sign of a more accepting school climate for LGBTQ+ students (Kosciw et al., 2018[151]) – particularly as research indicates that teachers who identify as LGBTQ+ are more likely than non-LGBTQ+ teachers "to engage in LGBTQ+-inclusive and affirming best practices" (GLSEN, 2022[152]).

Teacher diversity can also be important in terms of awareness and identification of the needs of students from diverse groups (Varsik and Gorochovskij, Forthcoming[50]). Referral rates of ethnic minority students into gifted programmes have, for instance, been shown to be significantly higher when their teacher shared their ethnic background. Increasing the share of ethnic minority teachers in schools could thus help in mitigating the underrepresentation of students from ethnic minority backgrounds in gifted education programmes (Grissom, Rodriguez and Kern, 2017[153]; Grissom and Redding, 2016[154]; Rutigliano and Quarshie, 2021[5]; Varsik and Gorochovskij, Forthcoming[50]).

Benefits for the classroom environment and student population as a whole

More broadly, greater diversity among teachers can promote more equitable and inclusive classroom environments, with positive impacts for the student body as a whole. The increased presence of diverse teachers in the classroom can strengthen the promotion of values of diversity, equity and inclusion at school and help dispel myths and stereotypes (OECD, 2022[47]). For example, evidence indicates that a more gender-balanced teaching workforce across education levels can have positive influences on students (OECD, 2020[155]), including by helping to challenge gender stereotypes and promote alternative perspectives to traditional and fixed conceptions of gender identities (Hutchings et al., 2008[156]; Brussino, 2021[16]). The increased representation of teachers with disabilities can also help to promote greater acceptance of students with SEN and social cohesion in the classroom (Brussino, 2020[11]).

There is also some evidence to suggest that teachers from diverse backgrounds tend to have more multicultural awareness, which can help stimulate student engagement and participation (Banks, 2010[157]; Ladson-Billings, 2009[146]; OECD, 2022[47]) and result in more cohesive classroom environments (Cherng and Davis, 2017[158]). Teachers from more diverse backgrounds may also be more inclined to speak about topics relating to inequities and social justice (Cherng and Halpin, 2016[159]). This can help facilitate environments that are conducive to constructive conversations on issues related to equity and inclusion (OECD, 2022[47]).

While it is envisaged that there may be further positive impacts of increasing diversity among teachers in terms of other dimensions of diversity (such as gender identity and sexual orientation, and SEN), analysis in this area is hindered by a lack of available data, both for teachers and for students. As discussed in Chapter 6, despite considerable progress, there remains a lack of data for many dimensions of diversity in education. In some education systems, for instance, legislation prohibits collecting information from an individual regarding their race or ethnicity (Balestra and Fleischer, 2018[160]). Sexual orientation and gender identity has also traditionally not featured in national systems for collecting data on society (Bell, 2017[161]). A lack of data on particular dimensions of diversity - for both teachers and students - makes it challenging to fully assess the impacts of enhancing teacher diversity.

There is currently a lack of diversity in the teaching profession across OECD countries

Many OECD countries are currently facing challenges in terms of widespread teacher shortages and high teacher turnover and attrition (OECD, 2019[45]). These issues, which hinder the provision of quality education for all learners and thus impact on educational equity, are compounded by a widespread lack of diversity among teachers across OECD countries, with evidence showing imbalances in terms of representation across various dimensions of diversity (Brussino, 2021[16]).

Data show, for instance, the persistence of gender imbalances among those entering and staying in the teaching profession. Female teachers are particularly over-represented in lower education levels, making up 82% of primary teachers on average in OECD countries in 2019, compared to 63% at secondary level and 44% at tertiary level (OECD, 2021[162]). While they are over-represented in the teaching workforce, however, they are comparatively under-represented in school leadership roles (47% on average across OECD countries) (OECD, 2020[155]).

Teachers in many OECD countries tend largely to come from the dominant cultural groups in their countries, while increasingly teaching to non-dominant cultures and minorities (Forghani-Arani, Cerna and Bannon, 2019[15]). In the United States, for example, Black males represent only 2% of the teaching force whereas African Americans account for at least 13.4% of the total population (United States Census Bureau, 2020[163]; Brussino, 2021[16]). Only 12% of all prospective teachers in England (United Kingdom) and 6% of all prospective teachers in Wales (United Kingdom) have an ethnic minority background, compared to 29% of primary school and 25% of secondary school students. This is an issue in terms of inclusive education as teachers from non-minority backgrounds may have only partial, biased and filtered

understandings of the experiences lived by individuals from non-dominant cultures (Forghani-Arani, Cerna and Bannon, 2019[15]). Having a majority of teachers from the dominant culture can make it more likely that teachers' dominant norms and values largely shape the classroom environment (OECD, 2022[47]). Given that students are often rewarded for conforming to prevailing school norms (Chambers et al., 2014[164]), having predominantly monocultural learning spaces can enable the reproduction of power and privilege (Moore and Bell, 1995[165]) and contribute to perpetuating "a cycle of inequity" (OECD, 2022[47]).

While there is a lack of official figures regarding Indigenous teachers and non-official figures are hard to verify (United Nations, n.d.[166]), teachers belonging to Indigenous communities or national minority backgrounds are also likely to be under-represented in the teaching profession across several countries. This is reflected in the existence of targeted policies in countries such as Canada to recruit more Indigenous teachers to the profession (Oloo and Kiramba, 2022[167]). As noted above, research indicates that the presence of Indigenous teachers is important for Indigenous students' feelings of belonging (OECD, 2017[18]).

Statistics on teachers with disabilities or SEN are similarly scarce (Brussino, 2021[16]). There is, however, a widespread understanding that, despite the existence of non-discrimination laws and policies in many OECD countries, teachers with diverse abilities continue to be under-represented across OECD education systems (Brussino, 2020[11]). This hinders efforts to promote diversity and inclusion on both sides of the classroom (Brussino, 2021[16]).

Similarly, as discussed above, sexual orientation and gender identity has traditionally not featured in national systems for collecting data on society (Bell, 2017[161]), which means that it is difficult to obtain a clear picture on the representation of LGBTQI+ persons in the teaching workforce.

There are multiple factors that come into play when considering the reasons for lack of diversity in the teaching profession. These include financial issues, which, while being a reason for the lack of attractiveness of the teaching profession generally, can particularly affect potential teacher candidates from diverse backgrounds (Brussino, 2021[16]). In the United States, for example, student debt represents a key deterrent for potential prospective Black students, who, being more likely to take out student loans to pay for their education (Fiddiman, Campbell and Partelow, 2019[168]) would likely enter the teaching profession with a higher pay penalty[3] than others (Allegretto and Mishel, 2019[169]; Brussino, 2021[16]). Recruitment and admissions procedures for ITE may also have the effect of indirectly discriminating against teachers from diverse backgrounds by assessing teacher candidates on the basis of their education history rather than their knowledge and competences (Brussino, 2021[16]).

Attracting diverse candidates into ITE as a foundational step towards enhanced diversity in the teaching workforce

Attracting and retaining more diverse candidates in ITE is a key first step to achieving greater diversity in the classroom and promoting equity and inclusion in education (Brussino, 2021[16]; OECD, 2022[47]). Education systems across the OECD have adopted a variety of initiatives to try to attract more diverse candidates into ITE. Strategies implemented as part of these initiatives include:

i. Investigating reasons for the underrepresentation of certain groups in ITE;
ii. Disseminating information about teaching to groups who are under-represented in the teaching workforce;
iii. Promoting positive teacher role models from diverse backgrounds or groups;
iv. Providing financial assistance or incentives;
v. Offering career counselling and support in partnership with schools or higher education institutions;
vi. Establishing support networks for prospective teacher candidates; and
vii. Offering alternative teacher certification programmes.

Conducting research into the reasons that may be behind the comparatively low enrolment rates of candidates from diverse backgrounds and groups in ITE programmes in a particular education system is a crucial first step to identifying policy measures that can improve the diversity of the teaching workforce. In England (United Kingdom), the South East Black and Minority Ethnic Project is a regional collaboration bringing together a number of ITE institutions to generate knowledge regarding the low recruitment rates of Black and ethnic minority teachers and strategies to address this. Factors identified through the research as contributing to the low recruitment rates include lack of awareness of the application process for ITE, lack of support networks and lack of access to shadow teaching experiences, as well as the low prestige and low salaries associated with the teaching profession (Brussino, 2021[16]; Donlevy, Rajaina and Meierkord, 2016[170]).

Conducting outreach activities and proactively engaging with young adults from particular communities or groups has also been employed in several education systems as a strategy to attract more diverse candidates into ITE programmes. In Germany, *Schülercampus – mehr Migranten werden Lehrer* (Campus for Pupils – More migrants are becoming teachers) is a nationwide programme implemented by the Federal Office for Migration and Refugees, in partnership with the ZEIT Foundation and local universities, to provide targeted career counselling for upper secondary students with an immigrant background who are interested in pursuing a teaching career. The programme offers four-day intensive, residential workshops to enable students to explore the opportunities of and requirements for becoming a teacher and to provide a foundation for local support networks (Brussino, 2021[16]; Donlevy, Rajaina and Meierkord, 2016[170]). Similarly, an ITE institution in Salzburg, Austria, organises and holds information days (called "We want you!") in co-operation with migrant associations to introduce secondary students with an immigrant background to teaching as a career option (Donlevy, Rajaina and Meierkord, 2016[170]). An ITE institution in Stockholm, Sweden, also runs information days as part of its objective of recruiting student teachers from economically disadvantaged suburbs, which also tend to be ethnically diverse (Donlevy, Rajaina and Meierkord, 2016[170]). In the United States, Pathways2Teaching is a programme run by the University of Colorado Denver designed to give upper secondary school students, and particularly those from diverse and disadvantaged backgrounds, the opportunity to explore teaching as a potential career choice while reflecting on issues related to educational equity. As part of the programme, students participate in weekly field experiences in primary schools, learn skills to assist them in applying to higher education programmes, engage with current student teachers, and learn about how teaching can challenge existing inequities and advance social justice. Approximately 50% of upper secondary students who participate in the programme go on to study teaching (Barber, 2018[171]).

Financial incentives can be an effective tool to promote diversity in the teaching body (Bireda and Chait, 2011[172]; Brussino, 2021[16]), particularly in light of the fact that the low monetary attractiveness of the teaching profession can deter many individuals, especially those from diverse backgrounds from pursuing a teaching career (Fiddiman, Campbell and Partelow, 2019[168]). A number of European countries, for example, have scholarship programmes to attract prospective teacher students from minority, immigrant or lower socio-economic backgrounds (Brussino, 2020[11]; European Commission, Directorate-General for Education, Youth, Sport and Culture, 2017[57]). Scholarships are also provided in various states in the United States, by ITE providers and/or official local education institutions, as a means of attracting candidates from diverse backgrounds into ITE. The Minority Teacher Incentive Grant Program in Connecticut, for example, provides up to USD 5 000 per year for the final two years of full-time study to undergraduates of colour enrolled in a Connecticut teacher preparation programme (Connecticut's Official State Website, 2022[173]).

Alternative teacher certification programmes can provide quicker, more flexible and more affordable routes into the teaching profession than traditional ITE programmes and can therefore serve as a strategy for attracting more diverse teacher candidates (Brussino, 2021[16]; Rafa and Roberts, 2020[174]). Following the mass migration in 2015 from specific war zones to Europe, several European countries developed re-qualification and preparation programmes for newly arrived migrant teachers to address teacher

shortages and respond to the increasing diversity of the student body (Cerna et al., 2019[64]; OECD, 2019[45]). The project Basics of Educational Studies for Displaced Teachers, for example, provides a re-qualification certificate programme to enable displaced teachers to re-enter the teaching profession in Austria, while also undertaking research and collecting data on the educational background and the professional needs of displaced teachers. The project responds to the need to receive, include and integrate newly arrived students in the Austrian education system and recognises the crucial role of teachers who speak the native languages of the newly arrived students in facilitating this process (Cerna et al., 2019[64]). Similar initiatives were also undertaken in Germany and Sweden (Ibid).

Several European countries, such as Estonia, Greece and Hungary, also offer specific alternative certification programmes for prospective teachers belonging to national minority groups (Brussino, 2021[16]; European Commission, Directorate-General for Education, Youth, Sport and Culture, 2017[57]). It is important, however, that such programmes are complemented by initiatives to address potential gaps in terms of ITE and to support teachers' successful integration into the teaching workforce, in order to ensure that all students have access to quality teachers, which, as noted above, is key for equity in education (OECD, 2022[24]). Effective induction and mentoring programmes (see below) can play a critical role in this respect.

Retaining diverse teachers to promote equity and inclusion in education

In addition to the issues that may impact on the recruitment of diverse candidates into the teaching profession high attrition in the early years of teaching, particularly of diverse teachers, represents a key challenge for education systems across the OECD that impacts on efforts to advance equity and inclusion in education (Brussino, 2021[16]).

High attrition and turnover rates among teachers generally are an issue across OECD countries (OECD, 2019[45]). Among the reasons for this is the fact that teaching can be a stressful and demanding career (OECD, 2020[125]), even more so in light of the additional expectations on teachers arising from increased diversity in schools (Brussino, 2021[16]) and from external events and developments such as the COVID-19 pandemic. TALIS 2018 data collected from schools at the primary and secondary levels prior to the pandemic showed that an average of one out of six teachers at the primary and secondary level reported feeling a "lot" of stress in their work in TALIS 2018 (OECD, 2021[175]). High stress levels can contribute to teachers' desire to leave the profession (OECD, 2020[125]), with regression analyses from TALIS 2018 data showing that teachers who reported feeling a lot of stress in their work are more likely to report wanting to leave the profession in the next five years in almost all participating countries and economies (OECD, 2021[175]). High turnover has implications in terms of stability, continuity and expertise within the teaching workforce and schools' ability to implement and sustain equity and inclusion measures (OECD, 2022[47]).

There is limited research focusing specifically on the turnover of teachers from diverse backgrounds or who embody a dimension of diversity – though studies have revealed higher attrition rates for teachers from ethnic minority backgrounds in both England (United Kingdom) and the United States (Cerna et al., 2021[1]; Ingersoll, May and Collins, 2017[176]; Tereshchenko, Mills and Bradbury, 2020[177]). High attrition rates among Indigenous teachers have also been identified as an area of concern in Canada (Burleigh, 2016[178]; Mueller et al., 2013[179]) and in Australia (Perkins and Shay, 2022[180]). On top of the stress and challenges associated with the general demands of the teaching profession, teachers from diverse backgrounds may also experience feelings of isolation and disconnection from their peers (Cerna et al., 2021[1]), receive limited support for their professional development, and/or feel unsafe in their school environment due to discrimination, microaggressions or harassment (Gist et al., 2021[181]). They may also be expected to take on additional work or responsibilities without formal recognition or support. Indigenous teachers for instance, are sometimes asked to take on a liaison role with all Indigenous parents or guardians in the school community, rather than just those of the students they themselves teach (OECD, 2017[18]), as well as being expected to explain Indigenous customs and protocol to other staff and/or

organise cultural events, without support or recognition (O'Callaghan, 2021[182]). In a similar vein, teachers from ethnic minority backgrounds have also reported feeling that they are regarded as "cultural support staff" or as experts on (inter-)cultural questions or matters (Bressler and Rotter, 2017[183]; Basit and Santoro, 2011[184]). Black male teachers interviewed in a study undertaken by Bristol and Mentor (2018[185]) also described being expected to take on the responsibility of managing or discipling misbehaving students and feeling that their colleagues perceived them as disciplinarians first and educators second (Bristol and Mentor, 2018[185]).

Teachers who identify as LGBTQ+ can face additional challenges, including discrimination and harassment, a feeling that their concerns are not heard or respected by school leadership, and stress due to fear of potential job loss on the basis of their sexual orientation or gender identity (Davis, 2022[186]; GLSEN, 2022[152]; Wright, Smith and Whitney, 2019[187]). In a study undertaken in the United Kingdom, for instance, one in four of the LGBT teachers surveyed reported that they believed that their sexual orientation or gender identity had been a barrier to promotion (Lee, 2019[188]). The existence of prejudice and stereotypes within school communities has also been noted as a key challenge facing teachers with disabilities, along with difficulties associated with a lack of support, both in terms of physical resources (such as materials in Braille for teachers with visual impairment) and human support (assistance, tutoring and peer support) (Neca, Borges and Pinto, 2020[150]).

Understanding the experiences teachers from diverse backgrounds and groups is crucial for identifying and implementing effective policies and strategies to support the retention of a diverse teaching workforce (Davis, 2022[186]; GLSEN, 2022[152]). However, comparatively little attention has so far been given to teachers from diverse backgrounds and groups in research on inclusive education, both in terms of the extent to which they are represented in the teaching workforce and in terms of the specific challenges they may encounter (GLSEN, 2022[152]; Neca, Borges and Pinto, 2020[150]). Further research is necessary in order to obtain a more fulsome picture of the diversity (or lack thereof) in the teaching profession, of the factors that may contribute to diverse teachers deciding to leave, and of the measures that are likely to be effective in supporting their retention. This should be grounded in the perspectives of current and former teachers from diverse backgrounds and groups (Gist and Bristol, 2021[189]; Perkins and Shay, 2022[180]). It is also important that such research take an intersectional approach, recognising the multiple identities of teachers from diverse backgrounds and groups and considering the complex ways these identities may be experienced within different socio-political and geographic contexts (Gist et al., 2021[190]).

Strategies to support diverse teachers: mentoring and communities of practice

One strategy that has been recognised as having the potential to support the retention of teachers from diverse backgrounds and groups is teacher mentoring. Teacher mentoring can take various forms. While mentors tend to be more experienced teachers working at the same school as the teacher being mentored, mentoring can also be provided by external teacher trainers or professionals working in the school's general locality (Gist et al., 2021[191]). Teacher mentoring frequently takes place in the form of a one-to-one relationship, but can also be provided to small groups of teachers as part of a broader induction curriculum (ibid.).

Research has highlighted the importance of mentoring for new teachers generally, as a key tool to support their successful entry into the profession and to help them navigate the challenges may face in their first few years of teaching (Brussino, 2021[16]; Ingersoll and Strong, 2011[192]; OECD, 2022[24]). Empirical evidence shows that teachers' participation in mentoring programmes is beneficial for student learning, helping new teachers to become more competent and more effective more quickly (OECD, 2019[45]). As new teachers tend to work in schools with a higher concentration of students from a socio-economically disadvantaged background and students from an immigrant background (OECD, 2022[2]), mentoring can in this respect be an important strategy for advancing equity in education (OECD, 2012[25]).

Studies have suggested that providing mentoring programmes designed specifically to meet the needs of teachers from ethnic minority or Indigenous backgrounds can be very valuable in addressing the specific challenges these teachers may face and in improving retention rates (Gist et al., 2021[191]). For instance, a mentoring or peer support network created for non-white male teachers in Boston (United States) was found to be successful in "providing both valuable social and emotional support and useful opportunities for participants to discuss and share effective teaching strategies", with the model subsequently being adopted by public schools across the entire district as part of a larger effort to improve the retention rates of non-white male teachers (Gist et al., 2021[191]). A study on the impacts of a programme for Indigenous teachers in the United States also found that the quality of the mentoring offered had been key to the programme's success in boosting Indigenous teacher retention rates, through helping participants cope with the everyday challenges of teaching and reinforcing their motivation to stay in the profession (Gist et al., 2021[181]). In England (United Kingdom), a study by Callender and Miller (2018[193]) found mentoring to be a key facilitating factor in the progression of teachers from ethnic minority backgrounds into leadership roles, with mentoring from leaders with similar backgrounds and who were able to relate to the experiences of their mentees being particularly powerful. In New Zealand, the *Te Whatu Kura* mentoring initiative introduced by the Ministry of Education was found to have positive impacts in addressing the significantly low retention rates of new teachers in the Māori-medium education sector (with 90% of participating teachers remaining in the Māori-medium sector over the three years of the programme, compared to the previous 30% retention rate) (Newbold, Trinick and Robertson, 2016[194]).

The provision of on-going effective mentoring support has also been recognised as being important to support overseas-trained teachers in transitioning to a new sociocultural environment and in acquiring the educational knowledge that is specific to their new country, as well as having positive impacts on their professional development (Yan, 2021[195]). A case study of immigrant teachers in Australia showed that mentoring can help newly arrived teachers develop feelings of belonging and a sense of professional identity, as well as facilitating contact and co-operation with other teaching colleagues (Peeler and Jane, 2005[196]).

To ensure they are effective in supporting diverse teachers, it is important that mentoring initiatives and programmes are sensitively contextualised to suit the specific needs of the particular school and its teachers (Gist et al., 2021[191]; Tereshchenko et al., 2022[197]). Researchers have also emphasised the importance of "critical mentoring" practices, which recognise and centre the personal and professional experiences teachers from ethnic minority and Indigenous backgrounds bring to teaching (Gist et al., 2021[191]). Critical mentoring involves a more horizontal relationship in which the mentor teacher recognises their role as a co-learner and "focuses attention on topics related to racial identity, encourages efforts to build informal mentoring networks, and explicitly addresses teachers' experiences with racial aggressions in their early careers" (ibid.). A study undertaken in the United States showed that this type of mentoring to have positive impacts in terms of developing new ethnic minority teachers' sense of confidence, agency and sense of professional identity (ibid.). Research has also highlighted the importance of effectively preparing mentors to provide culturally responsive support to teachers from ethnic minority and Indigenous backgrounds, including by offering mentors a space to come together and discuss the needs of their mentees (Ibid.).

While the topic of mentorship for teachers from diverse backgrounds is receiving increased focus, there is a need for further research on how teachers from different groups may benefit from different forms of and approaches to mentoring, and on how to effectively prepare mentors in light of this (Gist et al., 2021[191]). Existing research in this area also tends to focus on teachers from ethnic minority backgrounds in the context of England (United Kingdom) or the United States, with limited information being available as to how mentoring can effectively support teachers embodying other dimensions of diversity, in various geographical contexts.

In addition to mentoring, dedicated professional support groups – sometimes referred to as communities of practice or affinity groups – can also help to mitigate feelings of isolation among and support teachers

from diverse backgrounds (Gist et al., 2021[191]). Communities of practice or affinity groups serve as spaces where teachers with shared demographic characteristics can come together to share their experiences, give and receive social and emotional support, and discuss strategies for navigating challenges in their work environment (Bristol et al., 2020[198]; Connecticut's Official State Website, 2022[173]). Research in the context of the United States has shown that affinity groups can help to develop or strengthen a sense of belonging for teachers from ethnic minority backgrounds and support them in achieving their professional learning goals, as well as providing an avenue for teachers to give feedback to school leaders that can contribute to shaping a more equitable and inclusive working environment (Bristol et al., 2020[198]; Mosely, 2018[199]; Pour-Khorsid, 2016[200]).

The importance of professional support networks for LGBTQ+ teachers was also highlighted in a study examining the impacts of the Courageous Leaders programme in the United Kingdom, which provided LGBTQI+ teachers with the opportunity to share their experiences and learn from each other through a series of workshops. While the primary aim of the programme was to support LGBTQ+ teachers in obtaining leadership positions, the main reason cited by the majority of those surveyed for participating in the programme was the absence of any form of specific LGBTQ+ teacher support network in their school communities. Participating teachers reported that the programme had been important in helping them feel part of a community and in reducing feelings of isolation, as well as facilitating greater self-acceptance and self-confidence (Lee, 2019[188]).

Fostering positive relationships among students

In addition to teachers and school leaders, students are central actors in shaping and setting the tone of the classroom environment, and can play an important role in fostering well-being in schools (OECD, 2018[6]). Cultivating an appreciation for diversity and values of acceptance, respect and understanding among students is therefore a crucial aspect in creating learning spaces in which all students feel a sense of belonging and can achieve their educational potential (Cerna et al., 2021[1]). A key strategy for achieving this is encouraging the development of positive relationships among students through activities and programmes both in and outside the classroom. Research shows that having students work together and learn from each other through, for instance, co-operative learning strategies supported by teachers and school staff fosters positive intergroup attitudes and relationships among diverse groups of students, in addition to promoting greater academic success (Tropp and Saxena, 2018[201]). Fostering positive relationships among students through peer-mentoring programmes has also been identified as a policy lever for advancing equity for education in the sense that it can improve student well-being (OECD, 2018[6]) and thus support students in achieving their educational potential. In such programmes, student mentors are matched with one of their peers in order to provide an additional source of guidance and support. Several studies indicate positive self-reported outcomes for mentees (the supported students), including greater self-esteem and confidence, and improved social skills and school behaviour (OECD, 2018[6]; Coleman, Sykes and Groom, 2017[202]). For instance, there is evidence to suggest that mentoring schemes can help facilitate the adjustment of refugees and students with an immigrant background to the new school and education system (Crul, 2017[203]), as well as helping them to develop key competences and build their confidence (European Commission, 2020[204]; Koehler, Palaiologou and Brussino, 2022[14]). Research also shows that mentoring schemes can have positive effects on gifted students' motivation, self-worth and achievement (Ball, 2018[205]), particularly for students from a disadvantaged background and gifted minority students who can be more isolated than others (Bisland, 2001[206]; Centre for Education Statistics and Evaluation, 2019[51]; Rutigliano and Quarshie, 2021[5]).

Mentoring programmes have also been found to have positive impacts for the students who act as mentors, such as improved self-confidence and relationships with other students, as well as contributing to a more positive school climate overall (OECD, 2018[6]; Coleman, Sykes and Groom, 2017[202]). Evaluation reports of the Buddy Programme (*Patenschaftprogramm*) implemented in Germany, for instance, indicate that

peer-mentoring programmes can be effective not only in facilitating the integration of refugee children and young people but also in terms of strengthening intercultural reflection, decreasing prejudice and promoting empathy and mutual understanding among the host country mentors. Financed by the German Federal Ministry of Family and Youth and run by the NGO *Stiftung Bildung*, the programme works with schools and early childhood education centres to match refugees between the ages of 4 and 19 with young people without a refugee background who act as peer mentors (Koehler, Palaiologou and Brussino, 2022[14]; Schulz and Sauerborn, 2019[207]). The programme aims to facilitate the integration of young refugees through personal interactions with peers as well as fostering intercultural learning, exchange and peer learning (Stiftung Bildung, 2021[208]; Koehler, Palaiologou and Brussino, 2022[14]). Mentor or "buddy" teams undertake a variety of activities together, including language learning, participating in educational trips and playing sports (Koehler, Palaiologou and Brussino, 2022[14]; Schulz, 2018[209]). Almost all of the mentees who were surveyed as part of the evaluations of the first two years of the programme reported that they considered that the programme had helped them to adjust to their new environment in Germany (96% in 2016 and 93% in 2017) (Koehler, Palaiologou and Brussino, 2022[14]; Sauerborn, 2017[210]; Schulz, 2018[209]). The evaluations also found that the programme had been effective in promoting values of acceptance and empathy, in fostering the development of mutual understanding, and in contributing to the reduction prejudicial and stereotypical views and attitudes. Among the positive impacts noted in the report, 43% of mentees and 62% of mentors reported that they found it easier to accept different opinions and ways of living through participating in the programme. Evaluations of the programme found improvements to the broader school climate and increased interest of non-participants to become engaged in the programme in the future, suggesting that the mentor students had served as multipliers of a culture of integration (Koehler, Palaiologou and Brussino, 2022[14]; Sauerborn, 2017[210]; Schulz, 2018[209]; Schulz and Sauerborn, 2019[207]). The programme's scope broadened to include young people who are disadvantaged as a result of their socio-economic status, learning needs or immigration background (Koehler, Palaiologou and Brussino, 2022[14]; Patenschaftsprogramm, 2021[211]).

Mentoring is also feature of the Language Friendly School programme, which was initiated in 2019 by a NGO in the Netherlands to address increasing multilingualism in schools and has since been implemented in schools in Canada, the Netherlands and Spain. As part of the programme, newcomer students are mentored by a language ambassador – a student who speaks the newcomer students' mother tongue who accompanies them and eases their adjustment into their new school environment (Koehler, Palaiologou and Brussino, 2022[14]; Pichon-Vorstman and Kambel, 2021[212]). In addition to providing important support for the newcomer student, this initiative serves to recognise, respect and celebrate the knowledge and language of the language ambassador student (Pichon-Vorstman and Kambel, 2021[212]). In some OECD education systems, mentoring programmes have also been implemented to improve the learning outcomes of Indigenous students (OECD, 2017[18]) and students from disadvantaged socio-economic backgrounds. In New Zealand, for example, the Mentoring and Tutoring Education Scheme supports students in low disadvantaged schools who have been identified as being at risk of not reaching their academic potential, with the majority identifying as Māori and/or Pasifika (NZ Youth Mentoring Network, n.d.[213]; Great Potentials Foundation, n.d.[214]). Students receive support with academic learning and guidance on future pathways through a combination of weekly one-to-one mentor-mentee meetings and group workshops (Great Potentials Foundation, n.d.[214]).

Research undertaken on peer-mentoring programmes indicates that students and schools benefit most from peer-mentoring programmes that have a clear focus and are actively supported by school management and the broader school staff (OECD, 2018[6]; Coleman, Sykes and Groom, 2017[202]). Studies have highlighted the importance of training for both school coordinators and peer mentors, on topics such as communication and active listening, ensuring a non-judgmental attitude, recognising personal limits and when it is appropriate to refer the student to a staff member, and confidentiality and ethnical issues. Funding can be a further important factor, particularly if an external organisation is involved in the training of staff and/or students. Finally, a number of studies have emphasised the value of giving students the opportunity to participate in shaping the development of peer-mentoring programmes and of the

collaboration between learners and school staff in their implementation (Coleman, Sykes and Groom, 2017[202]).

Raising awareness of diversity in education among stakeholders

While teachers are the primary actors in students' learning, the perceptions and attitudes of a range of stakeholders feed into shaping the classroom environment and the extent to which it supports the learning and well-being of all students. What students hear and are exposed to in their broader home and community environments contributes to shaping their beliefs and worldviews, which they then bring into the classroom. Raising awareness of diversity among parents, guardians and community members is thus crucial to mitigate stereotypical or discriminatory beliefs that may, through their externalisation, negatively impact on diverse students and hinder efforts for equity and inclusion in education. Research indicates, for instance, that students with an immigrant or refugee background frequently encounter discrimination in school settings that may stem from negative attitudes among members of the host population towards refugees (UNICEF, 2016[215]; Spears Brown, 2015[216]; Mezzanotte, 2022[217]). Prejudicial views also result in some LGBTQI+ students encountering harassment, threats and violence on a frequent basis (Human Rights Campaign, 2013[218]; Mezzanotte, 2022[217]; European Union Agency for Fundamental Rights, 2020[219]). Awareness-raising has also been recognised by the United Nations Office of the High Commissioner for Human Rights (UNOCHR) as being key to address the negative attitudes and stereotypes that contribute to the marginalisation of persons with disabilities and hinder their full inclusion in society (Office of the United Nations High Commissioner for Human Rights, 2019[220]). More positively, parents, guardians and members of the broader community can play a crucial role in supporting, driving and promoting the successful implementation of equitable and inclusive education policies and practices (United Nations Educational, Scientific and Cultural Organisation; Global Education Monitoring Report; IGLYO, 2021[221]). In light of this, raising awareness of diversity in society and what it means for education is a foundational step in advancing equity and inclusion in education (Cerna et al., 2021[1]). Building awareness of diversity in society more broadly is also important to complement ITE and continuous professional learning in promoting teachers' receptivity to equitable and inclusive educational approaches, as well as addressing potential biases and prejudicial views that may impact on the way they interact with students in the classroom (Brussino, 2020[11]). Similarly, raising awareness among school leaders is key in terms of their ability, willingness and motivation to promote an inclusive and collaborative school environment that promotes the development of inclusive teaching practices and where diverse teachers feel supported and valued (Neca, Borges and Pinto, 2020[150]).

The Office of the United Nations High Commissioner for Human Rights has provided guidance to governments on a human rights-based approach to developing awareness-raising actions and programmes. While the guidance has been written specifically in relation to persons with disabilities, the recommendations can apply to awareness-raising regarding other dimensions of diversity. The key principles that can be drawn from the guidance are set out below (Office of the United Nations High Commissioner for Human Rights, 2019[220]):

- As attitudes towards persons with disabilities are complex, interventions designed to change them must be wide-ranging.
- Awareness-raising actions and programmes should be based on and promote an understanding of the diversity of lived experiences of persons with disabilities, which vary depending on both the cultural context and the nature of impairments.
- Given that positive changes in attitudes tend to be more durable and tend to occur at a faster pace when personal connections or ties are generated, the direct involvement of persons with disabilities is crucial to give a human dimension to awareness-raising programmes and better enable the correction of misrepresentations and stereotypes.

- The active engagement and involvement of persons with disabilities and the communities targeted by awareness-raising actions and programmes is also important to ensure that persons with disabilities are "recognised as equals from the outset" and that discriminatory attitudes and/or treatment is framed as an issue affecting society as a whole.
- To promote effective change, awareness-raising actions and programmes should appeal emotionally to their target audiences so that they understand discrimination and exclusion as something that is unfair and unjust for society as a whole and not just persons with disabilities.
- Mobilising action will often require a multi-stakeholder approach involving a range of community figures and members, the media and advocacy groups, as well as persons with disabilities and their families.
- Formal legal and policy frameworks play a fundamental role in framing attitudes and behaviour towards persons with disabilities and provide legitimacy for awareness-raising actions.
- Monitoring attitudes towards persons with disabilities is important to both inform the design of awareness-raising actions and programmes and to assess the extent to which they are effective.

Information campaigns

Information campaigns can be an effective strategy to help challenge negative attitudes, stereotypes and prejudices, and have been implemented by government agencies and national institutions in several education systems across the OECD. Positive impacts were associated, for instance, with a public campaign implemented by the government of Slovenia to raise awareness regarding the rights of persons with disabilities and anti-discrimination legislation (Office of the United Nations High Commissioner for Human Rights, 2019[220]). A national online campaign was also launched by Ireland's Department of Children, Equality, Disability, Integration and Youth as part key of the Government's LGBTI+ National Youth Strategy. The campaign focused on compiling stories that celebrate LGBTI young people and those who positively contribute to their everyday lives to show how LGBTI young people "are visible, valued and included in culture, society and sport" (Department of Children, Equality, Disability, Integration and Youth, 2020[222]). In Belgium, the Inter-Federal Centre for Equal Opportunities is an independent public institution that works to address discrimination on various grounds and in different contexts, including discrimination on the ground of disability in the context of education. In addition to providing advice and assistance to families and students with SEN, the Centre engages in advocacy and awareness-raising campaigns for inclusive education that are co-designed and co-developed with and for people with disabilities (UNIA, n.d.[223]; Brussino, 2020[11]). In. New Zealand, the Human Rights Commission, an independent entity funded through the Ministry of Justice (Human Rights Commission, n.d.[224]), has been running an on-going campaign since 2016 to raise awareness of and challenge racism in New Zealand society (Human Rights Commission, 2017[225]; Devoy, n.d.[226]). In 2018, the campaign was expanded to include an initiative (developed in partnership with the New Zealand Teaching Council) specifically addressing teachers, encouraging and supporting them to have productive conversations with their students about racism (Unteach Racism, 2021[227]).

Non-governmental organisations play a key role in many OECD education systems in raising awareness and in efforts to challenge negative attitudes and perceptions relating to different dimensions of diversity. Campaigns can be directed at particular stakeholders (for example, educators and school staff) or at the general public. In the United Kingdom, for instance, the national non-governmental organisation Mencap advocates for the inclusion of students with SEN by running information campaigns (Brussino, 2020[11]; Mencap, n.d.[228]). In Germany, the *Trägerkreis Junge Flüchtlinge e.V.* (Young Refugees Support Group) association carries out a variety of awareness-raising initiatives among key stakeholders on issues concerning young refugees, in addition to running dedicated programmes to support schools in responding to the needs of refugee students in diverse classrooms (Koehler, Palaiologou and Brussino, 2022[14]; Trägerkreis Junge Flüchtlinge e. V., n.d.[229]). NGOs also play a key role in raising awareness on giftedness

and on the needs of gifted students (Rutigliano and Quarshie, 2021[5]) and on the issues faced by LGBTQI+ students (McBrien, Rutigliano and Sticca, 2022[39]). The Australian Association for the Education of the Gifted and Talented, for example, runs a national Gifted Awareness week to "raise awareness of the identification, support and learning needs of gifted children" and to celebrate stakeholders who are making a difference in their lives (Australian Association for the Education of the Gifted and Talented, 2021[230]). In Canada, the NGO Egale runs multiple awareness-raising campaigns on a number of issues affecting 2SLGBTQI[4] persons, which have included a series of free live webinars for educators and school staff (Egale, n.d.[231]). As noted above, NGOs advocating for specific diverse groups can bring greater expertise and understanding of the particular issues facing diverse groups. However, NGOs may not always have an understanding of the issues to consider in the implementation of policies and practices for inclusive education. Awareness-raising campaigns specifically targeted at teachers and school staff may therefore be more effective when supported by, or implemented in partnership with, education agencies.

Further evidence is needed to understand the extent to which different campaigns are effective in raising awareness and promoting values that are crucial to the successful implementation of inclusive education policies and practices, including on whether campaigns led or supported by government agencies and/or national institutions tend to have greater reach and impact. There is some evidence to suggest that anti-bullying campaigns with a specific focus on bullying against LGBTQI+ students can have positive impacts (Kull et al., 2016[232]; McBrien, Rutigliano and Sticca, 2022[39]), although this is currently limited to the context of the United States (McBrien, Rutigliano and Sticca, 2022[39]).

Resources and information tools

In addition to running campaigns, NGOs, government agencies and national institutions in education systems across the OECD, as well as international organisations, have developed resources and tools to raise awareness among teachers, students, parents and/or community members regarding different dimensions of diversity. The United States' Department of Education's Office for Civil Rights, for example, provides online factsheets about supporting intersex students and on addressing LGBTQI+ discrimination in schools (US Department of Education Office for Civil Rights, 2021[233]). At the international level, United Nations Children's Fund (UNICEF) provides online resources and suggestions for parents of adolescents to support gender-responsive parenting, offering guidance on topics such as mitigating gender stereotypes and biases and raising awareness on the effects of harmful gender socialisation and on providing positive models of gender behaviours (Brussino and McBrien, 2022[234]; UNICEF, 2021[235]). Resources and learning materials are also produced by the Spanish Institute for Women and for Equal Opportunities (which is an autonomous body attached to the Ministry of Health, Social Services and Equality) to raise awareness among teachers, parents and students on issues related to gender inequalities (Spanish Ministry for Equal Opportunities, n.d.[236]). Resources and guidance on the needs of gifted students and students with SEN have also been developed and disseminated by various national and regional organisations and/or networks throughout the OECD (Brussino, 2020[11]).

Pointers for policy development

The final section of this chapter provides a series of policy options that education systems can consider to build capacity to address diversity and promote equity and inclusion in education. These have been developed on the basis of the analysis of different policies and practices developed in this chapter, which draws on available research and policy evidence along with experiences discussed in country-specific work of the Project and other OECD work.

Embed equity and inclusion as cross-cutting themes into ITE curricula

Initial teacher education (ITE) plays a critical role in shaping teachers' values, competences and knowledge before their entry into the profession. Ensuring that equity and inclusion are embedded as core, underlying themes within ITE curricula is crucial to ensure that teachers have the knowledge and competences required to create inclusive learning environments that enable all learners to achieve their educational potential. To facilitate this, education systems should consider explicitly incorporating competences related to equity and inclusion as part of the standards that set out what teachers need to know and be able to demonstrate at the completion of ITE. Drawing on the research on teacher training for inclusive education, it is important that objectives and standards are not just focused on addressing the needs of particular groups, but are framed in a way that promotes content designed to equip prospective teachers with the tools and competences to create learning environments that are inclusive of all learners. These include a strong theoretical knowledge of differentiated instruction and the skills to put this into practice, as well as critical reflection, the capacity to recognise and reflect on (un)consciously-held biases, global competence, and the ability to promote a growth mind-set among students. Frameworks such as the Universal Design for Learning and intercultural education (which are discussed in Chapter 5) can serve as guidance in the development of ITE objectives and competences that facilitate the embedding of equity and inclusion within ITE curricula, as can the examples discussed above.

Provide opportunities for teachers to continue developing knowledge and competences for equitable and inclusive teaching throughout their career

Ensuring that teachers have opportunities to update and refresh their knowledge and reflect on best practices for equitable and inclusive teaching is crucial in a context of increasing student diversity and other global trends that are changing the nature of the classroom environment. It is therefore important that teachers are provided with high-quality professional learning that allow them to develop and strengthen the knowledge and competences required to identify and effectively respond to the varied needs of diverse learners in evolving and uncertain contexts.

A key aspect of this is ensuring the availability of formal professional learning opportunities – such as courses and seminars – on pedagogical knowledge areas for equitable and inclusive teaching. These include concepts such as culturally sustaining pedagogy, pedagogical approaches and techniques to support learners with various SEN and how to effectively use digital technologies to include all learners, which are discussed in more detail in Chapter 5. In addition, teachers need to have the opportunity to develop their understanding of different dimensions of diversity and of how they intersect, and of the historical, social and cultural contexts of the communities in which they teach.

In addition to formal professional learning offerings related to equity and inclusion, facilitating opportunities for reflection and the sharing of good practices among teachers both within and across schools (such as professional learning communities and collaborative teaching approaches) is increasingly being recognised as an important strategy to foster equitable and inclusive teaching practices. Strong pedagogical leadership and resources, particularly time, are both important to facilitate and ensure the effectiveness of collaborative initiatives within and across schools. This involves providing coaching and training programmes for school leaders (of which there is currently a lack across OECD countries) and addressing workload issues that may mean they currently lack the time to engage in effective pedagogical leadership and training. School-wide professional learning days can also serve as an effective strategy to promote collaboration among teachers, particularly when supported by guidance at the system level as to how schools can effectively use these days to facilitate staff engagement in team learning.

Promote greater diversity in the teaching workforce by considering targeted measures to attract more diverse candidates into ITE

Enhancing the diversity of the teaching workforce can have positive impacts on multiple dimensions of student well-being, from learning to broader socio-emotional outcomes, for both learners from diverse groups and for the student body as a whole. However, lack of diversity among teachers is a challenge faced by many OECD education systems, with evidence showing imbalances in representation across various dimensions of diversity. This may be due to a range of factors, including financial issues (which can particularly affect teachers from diverse backgrounds), indirect discrimination or bias in the recruitment and admissions procedures for ITE, and lack of access to information about teaching or support networks. Addressing this issue therefore involves considering a variety of policy measures to attract and retain diverse candidates in ITE, based on research regarding reasons for the underrepresentation of certain groups in the teaching workforce of the particular education system. These may include partnering with local schools or associations to provide targeted information sessions regarding teaching for under-represented groups, providing students from diverse backgrounds with the opportunity to shadow diverse teachers, and targeted scholarship programmes. Alternative teacher certification programmes may also serve as a strategy for attracting more diverse teachers through providing quicker, more flexible and more affordable routes into the profession – although, as the initial training provided by such programmes tends to be shorter than that provided by traditional ITE courses, it is important that they are complemented by initiatives to support teachers' successful integration into the teaching workforce, in order to ensure that all students have access to quality teachers.

Support the retention of diverse teachers through teacher mentoring and professional support networks

High attrition and turnover negatively impact on the stability and expertise of staff within schools, which has implications in terms of the successful implementation of measures to promote equity and inclusion. While research focusing specifically on the turnover rates of teachers from diverse backgrounds or groups is limited, literature indicates that these teachers may experience additional challenges on top of the stress associated with the general demands of the teaching profession – such as feelings of isolation, discrimination and harassment, and lack of appropriate support.

Teacher mentoring has been recognised as a strategy that has the potential to improve the retention of teachers from diverse backgrounds and groups. Studies have indicated that mentoring programmes designed specifically to meet the needs of teachers from diverse backgrounds can play a crucial role in providing social and emotional support to these teachers, as well as helping them develop strategies to address the general challenges they may encounter in their initial years of teaching. Literature in this area has emphasised that, to be effective in supporting teachers from diverse backgrounds, such initiatives and programmes need to recognise and centre the personal and professional experiences of teachers from diverse backgrounds, and be sensitively designed to reflect and respond to the particular context of the school.

In addition to teacher mentoring programmes, education systems and schools can promote the retention of teachers from diverse backgrounds and groups by facilitating and supporting the development of professional support networks or communities of practice. Professional support networks and communities of practice can help to develop or strengthen a sense of belonging and mitigate feelings of isolation among teachers from diverse backgrounds and groups through providing a safe space where they can come together to share their experiences. They have also been recognised as having the potential to support diverse teachers in achieving their professional learning goals and providing an avenue through which teachers can provide school leaders with feedback on how the school environment can be made more equitable and inclusive.

Promote values of respect and understanding among students to create an inclusive environment

Students, in addition to teachers, are central actors in shaping and setting the tone of the classroom environment, and can play a key role in fostering well-being in schools. Cultivating an appreciation for diversity and values of acceptance, respect and understanding among students is therefore a crucial aspect in creating learning spaces in which all students feel a sense of belonging and can achieve their educational potential.

A key way in which education systems and schools can promote values for equity and inclusion among students is through initiatives that foster positive relationships among students. Peer-mentoring programmes, in particular, have been identified as a policy lever for advancing equity in education, with positive impacts for mentee and mentor students for the overall school climate. To enhance their effectiveness, peer-mentoring programmes should be actively supported by school leaders and the broader school staff. It is also important that schools have the resources and capacity to provide training for programme coordinators and the students who act as peer mentors on topics such as communication and active listening, ensuring a non-judgmental attitude, recognising personal limits and when it is appropriate to refer the student to a staff member, and confidentiality and ethnical issues. At the school level, giving students the opportunity to participate in shaping the development of programmes and promoting the collaboration between learners and school staff have also been recognised as factors that can contribute to the success of peer-mentoring initiatives.

Raise awareness of diversity among different stakeholders to build support for equitable and inclusive education policies and practices

The classroom environment, and the extent to which it supports the learning and well-being of all students, is shaped not only by the actions of teachers and school leaders but also by the attitudes and perceptions of a parents, guardians and community members. Raising awareness of diversity in society is thus an important foundational step in advancing equity and inclusion in education, both to mitigate stereotypical or discriminatory beliefs and to ensure that a range of stakeholders support and contribute to the successful implementation of equitable and inclusive policies and practices.

To be effective in promoting durable attitudinal change, awareness-raising actions and programmes should be based on and promote an understanding of the range of lived experiences of persons embodying the particular dimension of diversity in question, and appeal emotionally to their target audience(s) so that discrimination and exclusion are perceived as issues that negatively impact on society as a whole (rather than just a particular group). The active engagement and involvement of persons embodying the particular dimension of diversity in question is also crucial to give a human dimension to awareness-raising programmes and to support the correction of misrepresentations and stereotypes.

Information campaigns can be an effective strategy in raising awareness and promoting attitudinal change in society. While further research is needed as to the factors and features that contribute to a campaign's success (both in terms of reach and impact), a clearly defined focus and message appear to be important elements, as is the active involvement of persons embodying the particular dimension of diversity in question in the development and implementation of the campaign. Resources and information tools developed and disseminated by national and regional organisations and/or networks on particular dimensions of diversity can also support the mitigation of stereotypes and the promotion of values of acceptance and inclusion, and may play a very valuable complementary role to both campaigns and official anti-discrimination legislation and policy.

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Notes

[1] Continuous professional learning is not mandatory in 14 of the 38 countries and economies who participated in the OECD Indicators of Education Systems 2019 Survey on requirements related to examination days and professional development (OECD, 2020[155]).

[2] There is a body of literature exploring the positive impacts of role modelling on students with teachers sharing similar personal characteristics. However, there is a growing branch of literature that highlights the limitations of the traditional, one-dimensional conceptualisation of role modelling and that emphasises the need for a more multi-dimensional and intersectional understanding to teachers and students' identities (Alexander, 2006[237]; Brockenbrough, 2012[244]; Lewis, 2006[238]; Lynn and Jennings, 2009[239]; Rezai-Rashti and Martino, 2010[243]; Bristol, 2020[242]).

[3] Pay penalty for teachers refers to the fact that, when entering the profession, teachers can face considerable amount of student debt to be paid but, compared to other professions requiring similar levels of education, teachers may find it harder to repay the debt because of considerably lower salaries (Allegretto and Mishel, 2019[240]; OECD, 2019[45]).

[4] The acronym "2SLGBTQ" is used in Canada and stands for Two-Spirit, lesbian, gay, bisexual, transgender, queer (or questioning). Two-Spirit is an identity that some Indigenous people hold (Becoming Education & Advocacy, n.d.[241]).

5 Promoting equity and inclusion through school-level interventions

This chapter explores how different interventions at the school level can be leveraged to advance equity and inclusion in education, and support all students in the classroom. The Strength through Diversity project has identified five broad categories of school-level interventions: (i) matching resources within schools to students' learning needs; (ii) school climate; (iii) learning strategies to address diversity; (iv) non-instructional support and services; and (v) engagement with parents and the community. This chapter discusses each of these categories in turn, before concluding by setting out some pointers for policy development.

Introduction

Education systems' policies can create an equitable and inclusive framework for education settings (Chapter 2), but their implementation at the school level is what determines students' daily experiences in classrooms. It is in schools where policies take the form of specific resources, teaching practices and instructional and non-instructional support mechanisms.

Numerous interventions at the school level are needed to promote equity among and the inclusion of all students, and in particular students from diverse backgrounds or embodying particular dimensions of diversity. Without explicit attention by schools to the needs of and challenges experienced by these students, their ability to reach their full potential may be hindered. Conversely, careful, targeted approaches are important to help all students feel that they belong at school, can improve their well-being and sense of motivation, and provide increased opportunities for academic success.

The Strength through Diversity project has identified the following five categories of school-level interventions that can be leveraged to foster equity among and the inclusion of all students:

- Matching resources within schools to individual student learning needs;
- School climate;
- Learning strategies to address diversity;
- Non-instructional support and services;
- Engagement with parents and communities.

This chapter is organised into seven sections. After this introduction, it explores each of the above five categorised in turn, discussing how various interventions can help support the well-being and educational outcomes of all learners. It concludes by setting out some pointers for policy development.

Matching resources within schools to individual student learning needs

While central authorities often provide targeted (and, at times, earmarked) resources to support equity and inclusion efforts in schools, schools in many education systems across the OECD also have some authority over the allocation of the resources they receive (OECD, 2021[1]). Indeed, over the past three decades, many education systems, including those in Australia, Canada, Finland, Israel, Spain, Sweden and the United Kingdom, have granted their schools greater autonomy in both curricula and resource allocation decisions (OECD, 2017[2]). In 2015, PISA (2016[3]) asked school principals to report on the actors and bodies (teachers, principals, regions, local education authorities, national education authority) responsible for resource allocation decisions concerning their school (such as appointing and dismissing teachers; determining teachers' starting salaries and salary rises; and formulating school budgets and allocating them within the school). It found that, on average across OECD countries, 39% of the responsibility for school resources resided with principals, 3% with teachers, 12% with school boards, 23% with local or regional authorities, and the remaining 23% with national authorities (OECD, 2016[3]). These results showed that local educational levels, and schools in particular, generally have responsibility for managing resources for their student population. As a result, these schools are responsible for resource policy issues, including concerns relating to an equitable and inclusive allocation of available resources. In terms of vertical equity[1], this can concern addressing the needs of particular students attending the school, ensuring that disadvantaged students receive the necessary support to thrive.

Financial resources, however, are just one of many resources that schools can manipulate to serve their student populations, as mentioned in Chapter 3. The following section provides examples of various resources that can be leveraged directly by schools to address the needs of their students.

Allocating support staff within schools

Learning support staff, such as teaching assistants, can play a key role in supporting the work of teachers and in ensuring that all learners have the ability to achieve their educational potential. Research suggests that, if used effectively, learning support staff can contribute to improved student well-being and learning outcomes (Masdeu Navarro, 2015[4]). The presence of an additional professional in the class can, for instance, mean that students receive more individual help and attention during the lesson, from either the learning support staff member or the teacher. This can mean that students' learning needs are more likely to be met, which in turn can lead to improved learning outcomes (ibid.). The effective use of learning support staff may also facilitate a more flexible learning environment that can contribute to increased engagement and inclusion of students in learning activities (for example, through allowing students to be grouped in ways that responds to different learning needs for particular classroom activities) (ibid.).

Studies have found that learning support staff can be effective at improving attainment when used to support specific students in small groups or through structured interventions (Masdeu Navarro, 2015[4]). In England (United Kingdom), for instance, two randomised control trials – one of a literacy programme targeted at lower secondary school students identified as struggling in literacy and the other of a one-to-one mathematics support programme for primary school students – found significant improvements in students' learning in literacy and numeracy as a result of learning support staff intervention programmes. A large-scale randomised control trial conducted in Denmark analysing the effects of the use of a learning support staff member on Grade 6[2] students' achievement also found positive effects on student reading achievement, particularly among students with less educated parents (defined as both parents having, at most, ten years of schooling) (Andersen et al., 2014[5]). An evaluation of 44 pilot programmes of an initiative of the Denmark Ministry of Education to improve the academic achievement of low performing and disadvantaged students also indicated a positive impact of support staff on students' well-being,[3] particularly for the most disadvantaged students (Masdeu Navarro, 2015[4]).

The Strength through Diversity Policy Survey 2022 found that most education systems allocated learning support staff (such as teaching assistants) to support students with SEN. However, they can also be used to support the learning of other diverse students. For instance, a number of education systems (such as Australia, Finland and the United Kingdom) use bilingual assistants to support the specific language needs of students whose first language is not the language used by the school (Ministry of Finance of the Slovak Republic, 2020[6]).

Learning support staff may be used in various ways in the classroom. One model is co-teaching, which is where the classroom teacher works collaboratively with an assistant in planning and teaching lessons, with the objective of jointly delivering instruction in a way that meets the needs of all learners (Masdeu Navarro, 2015[4]; Mezzanotte, 2020[7]; Morin, 2019[8]). While this approach has its roots in special education, it is now employed in a variety of subjects across all levels of education (Masdeu Navarro, 2015[4]). It is, for instance, used as an approach in some education systems to support students whose first language is not that used by the school (Guthrie et al., 2019[9]; Masdeu Navarro, 2015[4]). Co-teaching has also been implemented in Chile and Canada to support the teaching of Indigenous language and culture (see Chapter 4) (OECD, 2017[10]; Santiago et al., 2017[11]). Co-teaching can be beneficial for students in that it allows them to spend more time with and receive more individual attention from teachers (Mezzanotte, 2020[7]; Morin, 2019[8]). Indeed, the literature suggests that co-teaching can result in a more effective teaching and learning environment, an increased understanding of students' needs and a greater exchange of knowledge and teaching strategies among professionals (Dieker, 2001[12]; Dieker and Murawski, 2003[13]; Masdeu Navarro, 2015[4]). Co-teaching may also contribute to enhanced student engagement: a study analysing the effects of co-teaching in primary school science classes by specialist science student teachers and general teachers found positive effects on students' enjoyment of the classes. Moreover, it also found fewer age or gender differences in attitudes to science than children (when compared with students who had not participated in the project) (Masdeu Navarro, 2015[4]; Murphy et al.,

2004[14]). Co-teaching involving language assistants has also been recognised as beneficial in terms of improving student motivation, participation and cross-cultural understanding (Masdeu Navarro, 2015[4]).

Box 5.1. Multidisciplinary teams to support inclusion in Portugal

In Portugal, legislation requires that each school have a multidisciplinary team, known as an *Equipa Multidisciplinar de Apoio à Educação Inclusiva*, to support the inclusion of students who may be facing difficulties and who require additional support. The permanent members of each team are a special education teacher, an assistant of the school director, the school psychologist and three members of the school's pedagogical council. In addition, teams include variable members, who are chosen depending on the student in question, as well as the student and their parents or guardians.

These teams are responsible for:

- Raising awareness of inclusive education in their educational community;
- Proposing learning support measures to be mobilised;
- Following-up and monitoring the implementation of learning support measures;
- Advising teachers about the implementation of inclusive pedagogical practices;
- Preparing technical-pedagogical reports, individual education plans and transition plans; and
- Monitoring and following-up on the functioning of learning support centres.

Source: OECD (2022[15]), Review of Inclusive Education in Portugal, Reviews of National Policies for Education, https://doi.org/10.1787/a9c95902-en

Class size

In some OECD countries, there is some flexibility in the organisation of class size in relation to the diverse composition of the student population. For instance, PISA finds that on average across OECD countries, socio-economically disadvantaged schools had more frequently smaller language-of-instruction classes compared to advantaged schools, as did rural schools compared to urban ones. Class size has been recognised as, in theory, a factor having the potential to impact on student learning – though research on this point is inconclusive (OECD, 2016[3]; OECD, 2019[16]). In smaller classes, teachers might be able to allocate more time and dedicated support to each student, whereas in larger classes some students may become disengaged due to their learning needs not receiving sufficient attention (OECD, 2019[16]). Findings from PISA 2015 show that students in schools with smaller class sizes were "more likely to report that their teachers adapt their lessons to students' needs and knowledge, provide individual help to struggling students, and change the structure of the lesson if students find it difficult to follow" (OECD, 2019[16]). There are also several studies that indicate that smaller classes can improve student outcomes and might be more beneficial for students from disadvantaged or minority backgrounds (Andersson, 2007[17]; Björklund et al., 2004[18]; Dynarski, Hyman and Schanzenbach, 2013[19]). Overall, however, the empirical evidence on the effectiveness of policies to reduce class size on students' academic outcomes is mixed (OECD, 2019[16]). While several studies using robust methodologies suggest that smaller classes may be of particular benefit to primary school pupils (Fredriksson, Öckert and Oosterbeek, 2012[20]; Chetty et al., 2011[21]; Vaag Iversen and Bonesrønning, 2013[22]), with some exceptions (Hoxby, 2000[23]), the evidence is less certain in the case of lower and upper secondary students, with large differences across countries (OECD, 2019[16]; Wößmann and West, 2006[24]). In general, the evaluation of the causal link between class size and performance is complicated by the fact that, in several contexts, disadvantaged schools have lower student-teacher ratios, which means it cannot be determined whether an observed performance outcome is the result of school composition (disadvantaged students often perform worse

than their more advantaged peers) and or of class size. Results from PISA 2018 suggest that small class size in disadvantaged schools does not fully compensate for the negative impact of the concentration of disadvantage within a school, which suggests that allocating more teachers to schools alone is not sufficient for enhancing the learning environment (OECD, 2019[16]). Previous PISA reports have also noted that some of the education systems identified as top-performers have large classes, and have suggested that investments in teacher quality are more effective than investing in efforts to reduce class size (OECD, 2019[16]; OECD, 2014[25]).

Leveraging time: Adapting schedules and timetables

Research on the effects of the amount of learning time on students' academic outcomes presents mixed evidence (OECD, 2020[26]). A number of factors – such as teachers' instructional practices, the curriculum and students' aptitudes – can mediate or condition the effectiveness of learning time, which means that the relationship between learning time and student achievement is hard to observe empirically (Baker et al., 2004[27]; OECD, 2020[26]; Scheerens and Hendriks, 2013[28]). Studies undertaken between 2009 and 2017 indicate that additional learning time has positive but diminishing effects on student performance student (Bellei, 2009[29]; Cattaneo, Oggenfuss and Wolter, 2017[30]; Gromada and Shewbridge, 2016[31]; Patall, Cooper and Allen, 2010[32]). This is reflected in findings from PISA 2018: on average across OECD countries, performance in reading improved with each additional hour of language-of-instruction lessons per week up to three hours, but this positive association between learning time in regular language-of-instruction lessons and reading performance weakened amongst students who spent more than three hours per week in these lessons (OECD, 2020[26]).

Research has also shown that the benefits of additional learning time can vary depending on student profile (for instance, whether they are low performing or come from a low socio-economic background) (OECD, 2020[26]). Radinger and Boeskens (2021[33]) note in an overview of the research that there is support for the hypothesis that added instruction time would be particularly beneficial for socio-economically disadvantaged students and could therefore promote equity in learning outcomes (Gromada and Shewbridge, 2016[31]; Patall, Cooper and Allen, 2010[32]). However, they also underline that in practice the effects of extending instruction time on equity are likely to depend on how the time is used (i.e., what content is covered and how teachers adapt their instruction to individual learners' needs) (Kraft, 2015[34]), and on how students would otherwise have spent their time. For example, all else being equal, substituting supervised learning support at school for time spent on homework (where family inputs play a greater role in students' success) is more likely to reduce inequities than increasing instruction time to cover additional curriculum content (Radinger and Boeskens, 2021[33]). A review undertaken by Patall et al. (2010[32]) found that additional school time may be particularly beneficial for at-risk students (Patall, Cooper and Allen, 2010[32]). Indeed, several studies reported that extended school time appeared to be effective for at-risk students or that more time benefitted minority, lower socio-economic status, or low-achievement students the most. In addition, extending school time may be particularly important for single-parent families and families in which both parents work outside the home (Patall, Cooper and Allen, 2010[32]). Extra time may also be particularly useful for students from an immigrant or refugee background who do not speak the language of instruction (Cerna, 2019[35]). Supplementary extension and enrichment programmes can offer gifted students the opportunity to deepen and extent their learning beyond what is taught within the standard classroom hours (Centre for Education Statistics and Evaluation, 2019[36]).

Extending school time should, however, be viewed as one of a number of possible interventions to improve the academic success of disadvantaged students, and not as a universal measure to improve achievement among students. Indeed, other support services, such as after-school programmes, summer school programmes, and other out-of-school services, may provide similar levels of academic support when extended school time is not an option for struggling students. Schools may also organise extra-curricular activities considered to have an impact on the overall well-being of students. These can consist of tutoring or after-school programmes for students falling behind (Travers, 2018[37]), supplementary extension or

enrichment programmes for gifted students (Centre for Education Statistics and Evaluation, 2019[36]; Rutigliano and Quarshie, 2021[38]), or recreational and social activities designed to improve the overall well-being of students (McBrien, 2022[39]). On this point, findings PISA 2018 showed that students who were enrolled in schools offering more creative extracurricular activities performed better in reading, on average across OECD countries and in 32 countries and economies, after accounting for students' and schools' socio-economic profile. At the system level, countries and economies whose schools offer more creative extracurricular activities were also found to tend to show greater equity in student performance (McBrien, 2022[39]).

Use of space

Another important resource is the school's physical infrastructure: the way in which spaces in schools are designed can influence the ability of the school to be inclusive (Cerna et al., 2021[40]). It can directly affect the school's climate (discussed below in the section on School climate), interactions and relationships in school, and the ability to engage the community around the school. It also concerns the well-being of particular groups such as with the accessibility for students with physical impairments or ways to organise spaces that are sensitive to minority cultures (ibid.).

As discussed in Chapter 3, infrastructural barriers can impede full accessibility of schools for students with physical impairments. Indeed, for a school to be considered accessible, all students, teachers and parents to be able to safely enter, use all the facilities including recreational areas, participate fully in all learning activities with as much autonomy as possible.

Space can also be adapted at the classroom level to support specific student needs. For instance, certain environmental interventions can be employed by teachers to support the learning of students with SEN (Mezzanotte, 2020[41]). For students with ADHD, for example, teachers organise the classroom space in a way that minimises the risk of distraction and supports improved focus, while also providing increased opportunities for teacher monitoring and interaction (CADDRA, 2018[42]). This could involve seating the student in an area with little distractions, such as near the teacher or seating the student next to positive role models, such as classmates who are likely not distract them and can help them stay on task (CHADD, 2018[43]).

Another way in which space can be used within schools to support students with SEN is through the creation of dedicated sensory rooms or designated quiet spaces. Sensory rooms or quiet spaces can help support autistic students through providing them with a safe space away from over-stimulation. If designed and used effectively, these spaces can also aid in developing students' coordination, communication and sensory management skills (AsIAm, n.d.[44]). Providing a dedicated room or space is a strategy that has been employed in some schools in Canada to help Indigenous students feel safe and increase feelings of belonging. In some instances, these rooms provide a space where staff can provide dedicated support to Indigenous students (an example is discussed in OECD (2017[10])).

More generally, findings from PISA 2018 showed that, on average across OECD countries, students who had access to a room at school to complete homework scored 14 points higher in reading than students without access to a room for homework (and five points higher after accounting for socio-economic status). Education systems with larger shares of students in schools offering a room(s) for homework tend to show better performance in reading, mathematics and science. However, students in advantaged schools were found to be more likely than students in disadvantaged schools to attend a school that provides a room for homework (the share of students in advantaged schools whose school provides a room for homework being about seven percentage points larger than for the share of students in disadvantaged schools) (OECD, 2020[26]).

A further way in which school spaces can be made more inclusive is through celebrating the cultural heritages and diversity of the student body. A secondary school in New Brunswick, Canada, for instance,

has sought to visually reflect the cultural diversity of its students through hanging country flags and displaying welcome boards throughout the school (OECD, 2018[45]). A school in the Coimbra Centro school cluster in Portugal has also decorated the walls of its library with flags and words in numerous languages along with a graph showing the different countries students come from (OECD, 2022[15]). In Australia, the New South Wales Department of Education produces an annual Calendar for Cultural Diversity, which schools can download and print to display on their premises. The calendar provides dates and information for key celebrations, commemorations and observances from different cultures. Each month of the calendar features a different language to reflect the linguistic diversity of the state's public schools he calendars feature artworks submitted by students from across the state (NSW Department of Education, 2022[46]). In addition to promoting the inclusion of students from an immigrant or refugee background (OECD, 2018[45]), ensuring the visibility of diverse cultures within schools and classrooms has been recognised as important for fostering a sense of belonging among and supporting the engagement of Indigenous students (OECD, 2017[47]). A simple action that schools can take in this respect is using signage at their entrance that is symbolic of Indigenous cultures and includes the use of an Indigenous language or languages. Indigenous cultural symbolism and language can also be integrated throughout the school's broader ethos, environment and learning activities (OECD, 2017[47]). This approach was taken by a school located in the Northwest Territories of Canada, which used the need to construct a new school building as an opportunity to integrate Indigenous cultural symbolism throughout the school and promote greater learning about Indigenous culture and the region's history (OECD, 2017[47]).

School climate

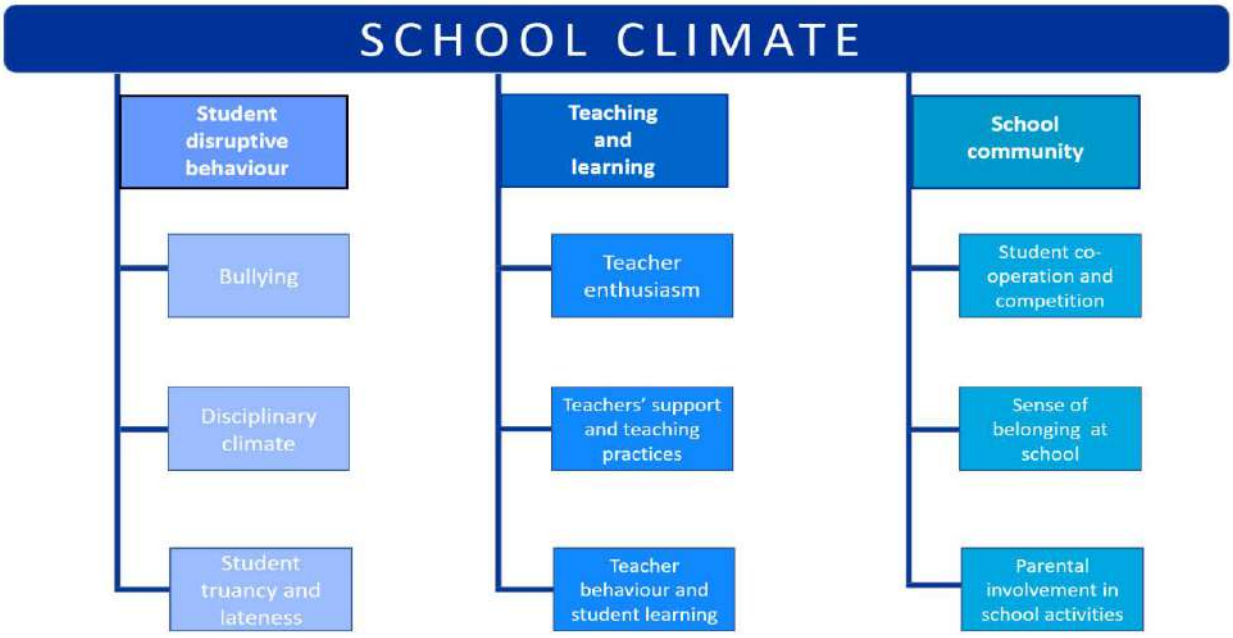
School climate is a broad and multidimensional concept that encompasses "virtually every aspect of the school experience" (OECD, 2019[48]; OECD, 2022[15]; Wang and Degol, 2015[49]). School climate is typically perceived and described as being either positive or negative. In a positive school climate students feel physically and emotionally safe; teachers are supportive, enthusiastic and responsive; parents and guardians engage in school life and activities voluntarily; the school community is built around healthy, respectful and cooperative relationships; and all stakeholders collaborate to develop a constructive school spirt (OECD, 2019[48]; OECD, 2022[15]). While there is not a general consensus on the elements that make up school climate, previous OECD work has identified four spheres that emerge from existing research:

- *Safety*, which includes both maladaptive behaviours (such as bullying, disciplinary problems in the classroom, substance abuse and truancy) and the rules, attitudes and school strategies related to these maladaptive behaviours;
- *Teaching and learning*, which includes aspects of teaching (such as academic support, feedback and enthusiasm, aspects of the curriculum, such as civic learning and socio-emotional skills) and indicators of teacher professional development and school leadership (such as teacher co-operation, teacher appraisal, administrative support and the school vision);
- *School community*, which includes aspects of the school community (such as student-teacher relationships, student co-operation and teamwork, respect for diversity, parental involvement, community partnerships) and outcomes of these indicators (such as school attachment, sense of belonging and engagement).
- *Institutional environment*, which includes school resources (such as buildings, facilities, educational resources and technology) and indicators of the school organisation (such as class size, school size and ability grouping) (OECD, 2019[48]).

The student and school questionnaires distributed with PISA 2018 included more than 20 questions related to school climate, with further questions included in the parent questionnaire, which was disseminated in 17 PISA-participating countries and economies (OECD, 2019[48]). The responses to these questions provide a series of indicators for the safety (which is renamed in the PISA 2018 Results as "student

disruptive behaviour"), teaching and learning, and school community dimensions of school climate, which are summarised in Figure 5.1 below (OECD, 2019[48]).

Figure 5.1. School climate as measured in PISA 2018



Source: OECD (2019[16]), PISA 2018 Results (Volume III): What School Life Means for Students' Lives, PISA, https://doi.org/10.1787/acd78851-en.

A positive school climate can have a significant impact on students' lives and is key for advancing equity and inclusion in education (OECD, 2019[48]; OECD, 2022[15]). Research indicates that a positive school climate promotes students' abilities to learn (Thapa et al., 2013[50]), with a number of studies having shown that school climate is directly related to academic achievement, at all school levels (Gottfredson and Gottfredson, 1989[51]; MacNeil, Prater and Busch, 2009[52]; Thapa et al., 2013[50]) and with long-lasting effects (Hoy, Hannum and Tschannen-Moran, 1998[53]). A positive school climate has been found to have a strong influence on the performance of immigrant students (OECD, 2018[54]), and to be able to mitigate the impact of socio-economic status on academic achievement (Berkowitz et al., 2016[55]; Cheema and Kitsantas, 2014[56]; Murray and Malmgren, 2005[57]; OECD, 2019[48]). Beyond academic outcomes, there is a substantial body of research showing that school climate can have a significant impact on students' mental and physical health (Thapa et al., 2013[50]). School climate can, for instance, improve students' self-esteem and mitigate the negative effects of self-criticism, as well as positively affecting a range of other emotional and mental health outcomes (ibid.). A positive school climate has also been associated with lower levels of drug use and fewer self-reported psychiatric issues among secondary school students (LaRusso, Romer and Selman, 2007[58]), and has been recognised as predictive of better psychological well-being in early adolescence (Ruus et al., 2007[59]; Thapa et al., 2013[50]). There is evidence that school climate influences students' motivation to learn (Eccles et al., 1993[60]) and can positively affect student engagement (OECD, 2018[54]; Thapa et al., 2013[50]). A positive school climate can thus, overall, have a profound influence on students' ability to reach their academic potential and on their social and emotional well-being (OECD, 2019[48]).

Research indicates that some student groups may be more likely to be exposed to non-supportive or hostile school climates. Data from the 2021 Gay, Lesbian and Straight Education Network (GLSEN)'s National School Climate Survey shows that school is a hostile environment for a number of LGBTQI+ students

across the United States, with the majority of survey respondents reporting that they routinely heard anti-LGBTQI+ language and experienced victimisation and discrimination at school (GLSEN, 2022[61]). This example highlights how school climate should be considered also in light of how it can affect and be experienced by different students, and interventions designed accordingly.

Improving a school's climate

A school's climate is the result of the multitude of educational policies and practices, student and teacher experiences, and other factors and dynamics that interact with each other in the context of the particular school. Many of these can be grouped in one of the three key elements of school climate identified by PISA 2018 (shown in Figure 5.1). Policies and practices concerning the second and third elements (teaching and learning, and the school community) are discussed in Chapters 2 and 4 of this report and in later sections of this chapter. The next subsection will focus on the first element, school safety, giving particular focus to bullying as a key factor that can shape school climate and that can be addressed through school-level interventions.

Bullying and school climate

Data from PISA show that bullying is widespread across OECD countries. In the 2018 PISA cycle, on average 23% of students report being bullied at least a few times a month while 8% reported being frequently bullied[4] across OECD countries (OECD, 2019[48]).

Both bullying and being bullied have been associated with poorer academic performance and lower well-being. For instance, students who reported being bullied at least a few times a month scored 21 points lower in reading than those who were less frequently bullied (OECD, 2019[48]). PISA data also suggest that attending a school where bullying is widespread, even if students themselves do not experience bullying, is related to worse performance, highlighting the general role of a safe school climate. From a socio-emotional perspective, students who are frequently bullied are also more likely to report feeling sad, scared and not satisfied with their lives. High bullying prevalence in schools is also related to a weaker sense of belonging at school, along with a poorer disciplinary climate and less cooperation among classmates.

To counter bullying in schools, teachers and school leaders need to be equipped to both recognise bullying and to actively create an environment where it is less likely to occur. Education systems have sought to address bullying in schools through a range of strategies and practices. These include suspending and expelling bullies, training teachers, teaching empathy and respect to students, maintaining constant adult supervision in school settings, collaborating with parents about student behaviour, and enacting school-wide policies about bullying (Hall, 2017[62]). A review and analysis of 100 studies evaluating the effectiveness of school-based anti-bullying programmes across a number of countries found that such programmes were effective in reducing both school-bullying perpetration (by an estimated 19-20%) and school-bullying victimisation (by an estimated 15-16%).

However, the authors of the review also found that there was significant heterogeneity across programmes in terms of their effectiveness (ibid.). Further research is needed to develop an understanding of the factors that can contribute to the success of anti-bullying programmes, though, as a starting point, research has suggested that such programmes may be more effective where they are based on evidence and sound theory and where they are implemented with a high level of fidelity (Hall, 2017[62]). Research from the United States on the impact of anti-bullying policies in reducing anti-LGBT[5] bullying also found that those with a specific LGBT focus were more likely to result in the improved safety and decreased victimisation of LGBT students than generic anti-bullying policies, which may suggest that targeted interventions may be more effective in addressing bullying directed at specific groups of diverse students (Kull et al., 2016[63]; McBrien, Rutigliano and Sticca, 2022[64]).

One of the most well-known anti-bullying programmes is the Olweus Bullying Prevention Programme. As discussed in Box 5.2, there is substantial evidence confirming this programme's effectiveness in reducing bullying.

Box 5.2. Olweus Bullying Prevention Programme: a whole-school bullying prevention programme

The Olweus Bullying Prevention Programme was developed to address bullying at both the primary and secondary levels of education. The Programme adopts a whole-school approach to bullying prevention, involving not only students, but also school staff, parents and the community as whole. The Programme is designed so that all students participate in most aspects, with students who have been identified as bullying others or victims of bullying receiving additional individualised interventions.

The Programme addresses the problem of bullying at four levels:

- School level: the Programme includes eight school-level components that focus on school communication and training, including the development of a Bullying Prevention Coordinating Committee, the members of which participate in two days of training on Programme implementation.
- Classroom level: interventions include defining and enforcing rules against bullying, holding class meetings focused on bullying prevention, promoting positive peer relations and pro-social behaviours, and periodic classroom or grade-level meetings for parents.
- Individual level: individual-level components are designed for dealing with individual bullying incidents. The Programme encourages and provides training to school staff to intervene when they witness, suspect or hear reports of bullying, and to effectively communicate with parents. On-the-spot and follow-up interventions provide staff with actions to take when they witness bullying first-hand and when they suspect or hear reports of bullying.
- Community level: interventions at this level are designed to develop community support for the Programme so students receive consistent anti-bullying messages in all areas of their lives.

A number of studies have found the Programme to be effective. Quasi-experimental studies that conducted in Norway and the United States, overall found evidence of the Programme having had a short-term positive impact on child outcomes related to student well-being and satisfaction with school life and in terms of preventing crime, violence and antisocial behaviour.

As in 2019, the Programme had been implemented in Barbados, Brazil, Canada, Germany, Iceland, Lithuania, Mexico, Norway, Panama, Sweden, the United Kingdom and the United States.

Source: Early Intervention Foundation (2019[65]), Olweus Bullying Prevention Programme, https://guidebook.eif.org.uk/programme/olweus-bullying-prevention-programme, (accessed 16 November 2022).

Learning strategies to support diverse students

The practices and strategies employed in the classroom play a crucial role in ensuring all learners are able to reach their educational potential and feel a sense of belonging. Addressing diverse needs in a classroom might involve the use of a variety of teaching formats and practices, adopting multiple ways of representing content to different learners, and adopting different rhythms with different students. In particular, student-oriented teaching strategies – which place the student at the centre of the activity and give learners a more active role in lessons than in traditional teacher-directed strategies – have been found to have

particularly positive effects on student learning and motivation (OECD, 2018[66]). These include differentiated teaching, individualised learning, such as one-to-one tuition, and small group approaches. In addition to adjustments teaching formats and strategies, flexibility in the way in which the curriculum is implemented at the school level can play an important role in addressing the needs of diverse students. The way in which assessments are designed and carried out can also affect student learning outcomes, having the potential to raise achievement and reduce disparities (OECD, 2013[67]).

The following section provides examples of different types of strategies that can be adopted to advance the learning outcomes and foster the inclusion of diverse learners in the classroom. These include adaptations to teaching formats and the curriculum, the use of frameworks to support inclusive teaching, pedagogical approaches, the use of digital technologies, and strategies to ensure equitable and inclusive student assessment.

Adapting teaching formats

There are a variety of ways in which teaching formats can be adapted to provide targeted support to particular learners. Two main approaches to providing teaching and support assistance are one-to-one tuition and small group interventions, which are often employed to support the learning of students with SEN (Brussino, 2020[68]). One-to-one instruction involves intensive individual education provision supported by a specialised teacher or a teaching assistant inside or outside of mainstream classes. In this format, students are encouraged to learn at their own pace with fewer time constraints and less pressure than may exist in group environments (Grasha, 2002[69]). In addition, one-to-one tuition does not stimulate competition with other students; this, for many, represents a positive aspect of such an approach.

However, limiting learning inputs and stimuli to only one teacher without including opportunities to learn alongside peers could discourage students with SEN. Interacting only with a teacher could make the learning less varied and could enhance feelings of marginalisation with respect to the rest of the classroom. From an economic perspective, one-to-one approaches can also be relatively expensive (Education Endowment Foundation, 2018[70]).

In small-group interventions, learning and teaching occur in small groups where a specialised teacher or teaching assistant follows a small number of students with SEN. In Japan, for instance, students who have been identified as having comparatively mild SEN are supported through small-group instruction in mainstream settings, and students identified as having greater needs can be supported either individually or in small teams in resource rooms in mainstream settings (Brussino, 2020[68]). Unlike one-to-one tuition, the small-group approach encourages peer learning and interaction. Specialised teachers provide support to small groups of students with SEN ensuring that students learn at their own rhythm and receive more support and feedback than in mainstream settings. Compared to one-to-one approaches, small groups can stimulate more active and deeper learning on top of strengthening socialisation and peer learning (Jones, 2007[71]). Small group instruction can also be more efficient in terms of resource and time management than one-to-one strategies (Bertsch, 2002[72]), even if additional investments and resources may be needed to provide specialised staff and teaching rooms (Jones, 2007[71]).

Small-group learning might create pressure and anxiety in students who are less active participants in discussions and group works. Further challenges could arise if teachers are used to teacher-centred teaching strategies as small-group learning entails more student-centred approaches (Bertsch, 2002[72]).

There are therefore several advantages and disadvantages to be considered when designing and implementing teaching formats for students with SEN, as summarised below (Table 5.1).

Table 5.1. Advantages and disadvantages of one-to-one and small group tuition

	Advantages	Disadvantages
One-to-one tuition	• Individual support by specialised teachers • Fewer time constraints, pressure and anxiety • Lack of competition with other students can be perceived as a positive aspect	• Risks of marginalisation and exhaustion, lack of encouragement • Risks of not ensuring enough individual and independent learning time to the student without support by teacher • Lack of peer learning • Can be relatively expensive
Small-group approach	• Increased communication between teacher and students compared to standard learning in mainstream classes • Easier tailoring of learning and activities to individual students' learning pace than in mainstream learning • Promotes more active learning, peer learning and socialisation among students compared to one-to-one approach • Allows students to check and clarify notions learnt and promotes deep rather than surface learning	• Might create pressure and anxiety for students who are not prone to be active participants in small-group interactions • Challenges if teachers are used to teacher-centred strategies as small-group tuition entails student-centred strategies • Often requires additional investments and resources to provide adequate staff and teaching rooms

Sources: Adapted from Brussino (2020[68]), Mapping policy approaches and practices for the inclusion of students with special education needs, OECD Education Working Papers, No. 227, https://doi.org/10.1787/600fbad5-en.

Adapting the curriculum

As discussed in detail in Chapter 2, curriculum has an important role in the promotion of equity and inclusion in education systems. The implementation of curriculum at the school level also has a significant impact on student lives. In practice, the flexibility in delivering the curriculum supports teachers in addressing the needs of diverse students.

Individual Education Plans

A key tool in the adaptation of the curriculum is the development of individualised plans for students with SEN, which allow for the provision of tailored programmes based on the child's difficulties and needs for flexibility (Mezzanotte, 2020[41]). These programmes are most often referred to as "Individual Education Plans" (IEPs), but may also be known in different education systems as 'Negotiated Education Plans', 'Educational Adjustment Programmes', 'Individual Learning Plans', 'Learning Plans', 'Personalised Intervention Programmes', and 'Supervisory Plans' (Mitchell, Morton and Hornby, 2010[73]). Generally, these plans are documents tailored on the individual children and their needs, and include elements such as a student's present level of performance, the individualised instruction and related services to be provided, the support mechanisms being offered (such as accommodations or assistive technology), and the annual goals set for the student (Undestood, 2019[74]).

Individual Education Plans are offered in most OECD countries, with variation in the way in which they are developed (Mezzanotte, 2020[41]). In some countries, the development of each plan is carried out within the individual school. Some countries, such as the France, Ireland, Italy, the United Kingdom and the United States, do not rely only on teachers or principals for the drafting of the IEPs, but also involve – or take into consideration – other actors, such as neuro-psychiatrists or clinical psychologists, parents and sometimes the children themselves, in the process (Sandri, 2014[75]; Cavendish and Connor, 2017[76]). Other countries, such as Spain, make curricula adaptations for students the exclusive competence of the tutor or teacher of the specific subject (Ministerio de Educación y Formación Profesional (Ministry of Education and Vocational Training), 2015[77]). Education systems also differ in the legal status of IEPs and

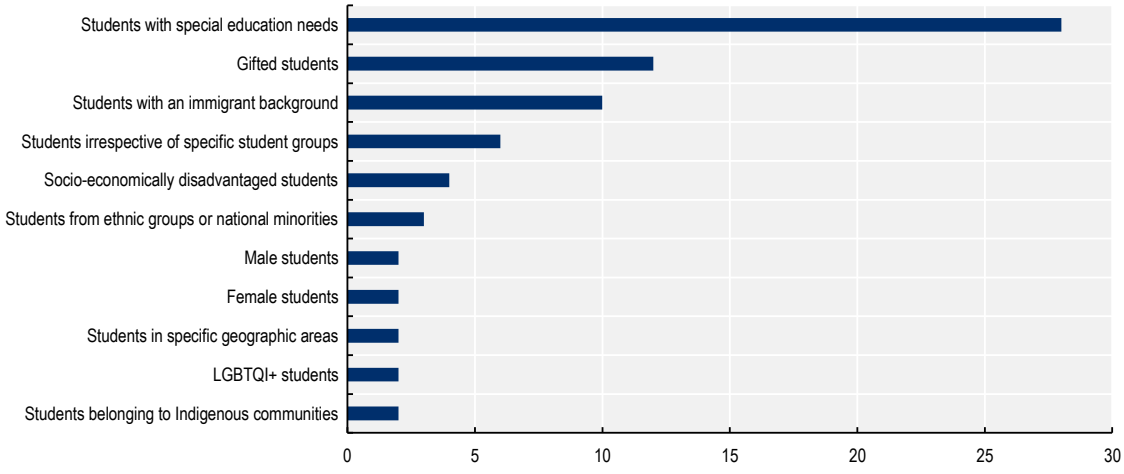
in whether their content is set by law or is a more flexible document that can be amended and updated according to the needs and progress of the student (Mezzanotte, 2020[41]).

The Strength through Diversity Policy Survey 2022 (Figure 5.2) shows that the majority of education systems provided IEPs for students with SEN, as described above. However, the use of such plans extends to other student groups, too. For instance, IEPs are also provided to students with an immigrant background. In Sweden, for example, all new arrivals are assessed on their academic knowledge and language skills within two months of starting school (with academic knowledge assessments being held in the students' mother tongues in order to enable students to demonstrate their previous learning without being hindered by language barriers) (Bunar, 2017[78]; Cerna, 2019[35]). School leaders use the results to determine the most appropriate educational trajectory for each student, having regard to their age, language skills and their academic knowledge. It is mandatory for all newly arrived students from grade 7 onwards to have an IEP (Cerna, 2019[35]; Skolverket (National Agency for Education), 2018[79]). Similarly, in Finland, an individual curriculum is designed for each student with a refugee or immigrant background based on their learning needs, previous school history, age and other factors related to their background that may be relevant to their schooling (such as whether they are an unaccompanied minor or have come from a war situation). The individual curriculum is determined by the teacher in collaboration with the student and their family (Cerna, 2019[35]; Dervin, Simpson and Maitkainen, 2017[80]).

Ten education systems reported providing IEPs to immigrant students in the Strength through Diversity Policy Survey 2022. In addition, 12 reported providing IEPs to gifted students, and six reported providing IEPs to all students, irrespective of whether a student belongs to a particular diverse group or groups.

Figure 5.2. Provision of an Individual Education Plan (or a similar document)

Number of education systems that provide an IEP to specific student groups



Note: This figure is based on answers to the question "Does the education policy framework in your jurisdiction require teachers at ISCED 2 level to provide diverse students with any of the following? [Provision of an Individual Education Plan (or a similar document)]". Thirty-one education systems responded to this question. Response options were not mutually exclusive.
Options selected have been ranked in descending order of the number of education systems.
Source: OECD (2022[81]), Strength through Diversity Policy Survey 2022.

StatLink https://stat.link/kjx9lz

Conditions regarding the entitlement of IEPs vary across education systems. Some education systems, for example, require students to have received a formal diagnosis of SEN to be assigned an IEP and receive

instructional support at school (Mezzanotte, 2020[41]). This can present challenges for students who have not been able to obtain an official diagnosis but are nevertheless in need of additional support (ibid). A way of addressing this issue in education systems requiring an official diagnosis could be to offer the option of developing an alternative, less formal individualised learning plan for students who do not meet the official criteria to be eligible for an IEP. In Finland, for example, Learning Plans can be developed for any student, including those who have not received an official SEN diagnosis and who are therefore not eligible for an IEP. The Learning Plan is designed to support any student to learn (be they a student with SEN, a student from an immigrant background, or a gifted student) and to help teachers in adopting differentiation teaching strategies (Mezzanotte, 2020[41]; Mitchell, Morton and Hornby, 2010[73]).

In addition to facilitating the development of tailored learning programmes while a student is at school, IEPs (or equivalent student planning documents) can be used to help students prepare for their future beyond secondary education (Mezzanotte, 2020[7]). The degree and nature of support offered by schools has been recognised as playing a key role in students' ability to cope with and navigate the transition process from secondary education to tertiary education and/or the workforce (Ebersold, 2012[82]). This can be particularly important for students with SEN, who may face many barriers that hinder their entry into higher education or the labour market (Mezzanotte, 2020[7]). Several OECD education systems (such as Canada, Ireland, New Zealand and Scotland (United Kingdom)) specifically include transition planning in the guidelines provided for IEPs (Mitchell, Morton and Hornby, 2010[73]; Mezzanotte, 2020[7]). The Individuals with Disabilities Education Act 1997 mandates transition planning as part of the IEP for students from the age of SEN (National Transition Network, n.d.[83]), and the statutory guidance for organisations working with young people with SEN in the United Kingdom and Wales also specifies that transition planning must be incorporated into the education, health and care plans for students from year 9 (ISCED 2) onwards (Department for Education; Department of Health, 2015[84]).

Accommodations and modifications

Individual Education Plans enable schools to provide adaptations of the curriculum to address students' specific needs. There are a variety of ways in which curricula can be adapted so as to be made more accessible to students, including in terms of content, teaching materials and responses expected from learners. Modifications (e.g., enlarging the font of a text), substitutions (e.g., Braille for written materials) or omissions of complex work are all possibilities for students with SEN (Mitchell, Morton and Hornby, 2010[73]).

Individual Education Plans generally provide for or facilitate two main types of adjustments: accommodations and modifications (see Chapter 2). Accommodations concern *how* students learn, while modifications relate to *what* students learn (Understood, 2019[85]). Accommodations are intended to help students learn the same information as other students, and can be instructional (adjustments in teaching strategies to enable the student to learn and to progress through the curriculum), environmental (changes or additions to the physical environment of the classroom and/or the school) or relate to assessment (adjustments in assessment activities and methods required to enable the student to demonstrate learning) (Olszewski-Kubilius and Lee, 2004[86]). In their implementation at the school level, accommodations are most effective when tailored to the specific needs of the children. For example, common accommodations that are often offered to students with ADHD include providing additional time for tests, the use of positive reinforcement and feedback, changes to the environment to minimise the risk of distraction and the use of technology to assist with tasks (CDC, 2019[87]; Mezzanotte, 2020[41]).

In cases where accommodations do not sufficiently provide for the needs of children with IEPs, modifications must be made. Whereas accommodations allow students to learn the same content as their peers, modifications are actual changes to assignments or the curriculum that schools and teachers can design to make it easier for students to stay on track (Sands, 2016[88]) and can involve the student learning different material, being graded or assessed under different standards than other students, or being

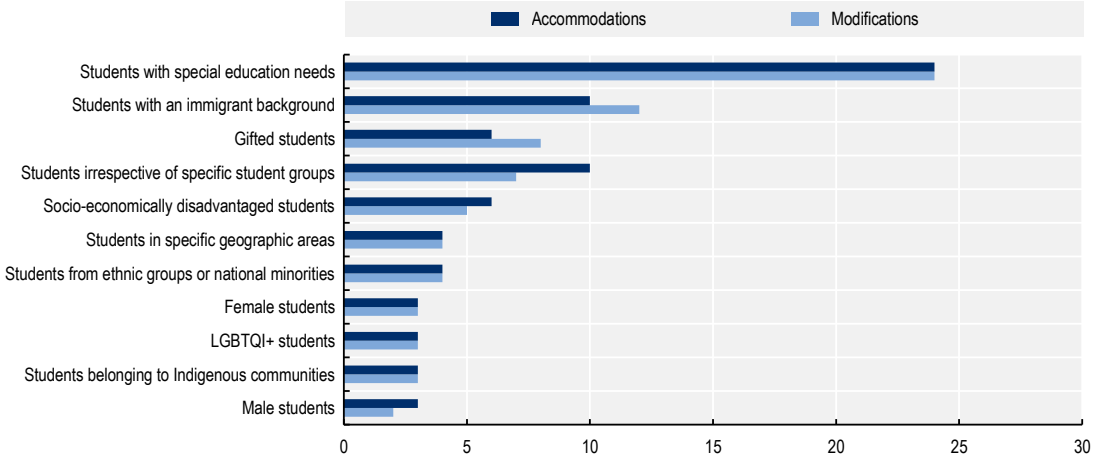
excused from particular projects (Morin, 2019[89]). In the case of gifted students, for instance, schools can provide specific classes or courses with modified expectations. For some students (such as language and mathematics), the gifted student may work to learning expectations from a different grade level. In other subjects, the complexity of the learning expectations may be increased. With this type of programming, the affected subjects or courses would be identified in the IEP as subjects or courses with modified expectations (Ontario Ministry of Education, 2004[90]).

As shown in Figure 5.3, 24 of the education systems who participated in the Strength through Diversity Policy Survey 2022 reported providing accommodations and modifications for students with SEN. In many of these cases (19), students with SEN were the only group reported as being entitled to accommodations or modifications. Ten education systems reported offering accommodations exclusively to students with SEN (Canada, Denmark, the Flemish Community of Belgium, Ireland, Italy, Luxembourg, the Netherlands, the Slovak Republic, Scotland (United Kingdom), United States), and ten reported offering modifications exclusively to this student group (Canada, England (United Kingdom), the Flemish Community of Belgium, Ireland, Latvia, Lithuania, Luxembourg, the Netherlands, Scotland (United Kingdom), the United States). As discussed above, the entitlement to accommodations and modifications in certain systems may be linked to an official diagnosis of disability or specific disorder.

However, a number of education systems reported providing adaptations to other groups, or to all students irrespective of their specific groups. As shown in Figure 5.3, various systems reported offering accommodations (10) and modifications (12) to students with an immigrant background, and 10 and 7 education systems respectively reported offering them to all students, irrespective of their background. A number of systems also reported offering accommodations and modifications to gifted and socio-economically disadvantaged students.

Figure 5.3. Accommodations and modifications

Number of education systems reporting they require teachers at ISCED 2 level to provide accommodations and modifications to different student groups



Note: This figure is based on answers to the question "Does the education policy framework in your jurisdiction require teachers at ISCED 2 level to provide diverse students with any of the following?". Thirty-two education systems responded to this question. Response options were not mutually exclusive.
Options selected have been ranked in descending order of the number of education systems that require the provision of modifications.
Source: OECD (2022[81]), Strength through Diversity Policy Survey 2022.

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There are, however, concerns that practices associated with providing students with certain accommodations can give rise to the risk of "watering down" the curriculum and expectations of students (Ellis, 1997[91]; Sitlington and Frank, 1993[92]). The types of accommodations concerned are those that seek to enable students to acquire the necessary credits to graduate and enable them to understand and retain the knowledge necessary to attain course credits. Limitations associated with such accommodations include their emphasis on memorising loosely related facts, reduced opportunities for learning content and to develop thinking skills, inhibited "learnability" of subject matter, and reduced investment in learning (Mezzanotte, 2020[41]; Ellis, 1997[91]).

In addition, a study on IEPs in the United States published in 2014 has shown that many of the most commonly used support tools for students with ADHD have very limited research support, and that the most empirically-validated approaches were rarely included on the IEPs of students with ADHD (Spiel, Evans and Langberg, 2014[93]). It was found that only around one-fourth of the interventions implemented for students with ADHD were supported by evidence of efficacy in literature. For example, the most common support mechanisms – extended time on tests and assignments, progress monitoring, and case management – were found to have no reported evidence of effectiveness in improving performance among ADHD students. Other research has also found that additional test time does not appear to provide more benefits to students with ADHD than students without (Lewandowski et al., 2007[94]). In fact, extended test time can affect their ability to stay focused for the whole duration of the test, due to the difficulties such students experience in sustaining attention for longer time periods (Pariseau et al., 2010[95]).

Overall, the researchers identified a need for further research to evaluate the effectiveness of the more frequently-used services for students with ADHD, as most of these had never been systematically evaluated (Spiel, Evans and Langberg, 2014[93]). Another notable issue concerning adjustments to curricula and support mechanisms is that the range of services offered can vary greatly between specialised schools and mainstream classrooms (Murray et al., 2014[96]).

Frameworks for inclusive learning

Advancing inclusion and equity requires learning and teaching to be adapted to students, rather than expecting students to adapt to traditional learning and teaching practices. The next section presents two frameworks that can be used to guide and support teachers and school staff in designing and delivering pedagogies, curricula and assessments that foster the inclusion of all learners in increasingly diverse classrooms.

Universal Design for Learning

The Universal Design for Learning (UDL) is a tool that can be used to support teachers and education stakeholders in designing and implementing inclusive teaching through pedagogies, curricula and assessments. Universal Design for Learning aims to dismantle barriers to participation and learning for all learning by centring learner variability in curriculum development (Waitoller and King Thorius, 2016[97]; Rose and Meyer, 2002[98]).

The UDL provides three guiding principles for the design and implementation of flexible curriculum goal, materials, methods, and assessments, as follows (CAST, 2018[99]; Brussino, 2021[100]; Rose and Meyer, 2002[98]):

1. Multiple means of representation. This principle addresses the "what" of learning, accounting for the different ways in which learners perceive and understand information, and guides teachers to present information in various, flexible formats.
2. Multiple means of action and expression. This principle addresses the "how" of learning, accounting for the different ways by which students navigate the learning activity and express their knowledge.

3. Multiple means of engagement. This principle targets the "why" of learning, addressing the various ways in which students' interest can be attracted and sustained, while also guiding teachers to build into a particular learning activity various sources of motivation and engagement.

Rather than representing three separate guidelines, these principles constitute an overarching structure to be embedded within curriculum, materials, instruction and assessment. The nature of these three guidelines allows educators to develop learning environments in which accommodations and modifications are not seen as additional work for the teaching staff, but as part of an inclusive structure to be implemented systematically (Jimenez and Hudson, 2019[101]).

The UDL is particularly helpful in increasingly diverse classrooms, as it provides for the flexibility necessary to support diverse learning needs and styles (Brussino, 2021[100]). Through its focus on providing students with different means to interact with learning material and adapting information to students (rather than asking students to adapt to the information), the UDL can help schools better accommodate students' needs and learning in diverse classrooms (CAST, 2018[99]).

Universal Design for Learning Guidelines have been developed for teachers and other education stakeholders to implement the UDL framework. These guidelines provide practical suggestions to develop inclusive teaching and learning strategies that can promote the well-being of all students (see Table 5.2).

Table 5.2. Universal Design for Learning Guidelines

Provide multiple means of engagement	Provide multiple means of representation	Provide multiple means of action and expression
Provide options for recruiting interest: Optimise individual choice and autonomy Optimise relevance, value and authenticity Minimise threats and distractions	Provide options for perception: Offer ways of customising the display of information Offer alternatives for auditory information Offer alternatives for visual information	Provide options for physical action: Vary the methods for response and navigation Optimise access to tools and assistive technologies
Provide options for sustaining effort and persistence: Heighten salience of goals and objectives Vary demands and resources to optimise challenge Foster collaboration and community Increase mastery-oriented feedback	Provide options for language and symbols: Clarify vocabulary and symbols Clarify syntax and structure Support decoding of text, mathematical notation and symbols Promote understanding across languages Illustrate through multiple media	Provide options for expression and communication: Use multiple media for communication Use multiple tools for construction and composition Build fluencies with graduated levels of support for practice and performance
Provide options for self-regulation: Promote expectations and beliefs that optimise motivation Facilitate personal coping skills and strategies Develop self-assessment and reflection	Provide options for comprehension: Activate or supply background knowledge Highlight patterns, critical features, big ideas and relationships Guide information processing and visualisation Maximise transfer and generalisation	Provide options for executive functions: Guide appropriate goal-setting Supporting planning and strategy development Facilitate managing information and resources Enhance capacity for monitoring progress

Source: Brussino (2021[100]), adapted from CAST (2018[99]), Universal Design for Learning Guidelines, http://udlguidelines.cast.org (accessed 15 October 2020).

While UDL is often perceived as a tool to support students with SEN, it is designed to support the development of a universal approach to teaching diverse groups that encompasses learners. The UDL framework has been recognised as designing both the instructional context and content for variability and differentiation from the outset, eliminating or reducing the number and severity of learning barriers in way that results in increased access for all and less work for individual educators (Jimenez and Hudson, 2019[101]). A meta-analysis on the empirical research on the effectiveness of UDL as a teaching method to improve the learning of all students found that UDL can improve the learning process and have positive

impacts for both students with SEN and those without (Capp, 2017[102]). Identified benefits of implementation of the UDL for students without SEN increased academic engagement, improved relationships with peers, a greater appreciation of diversity, the acquisition of new advocacy and support skills, increased empathy, and having higher expectations for their classmates (Capp, 2017[102]).

Intercultural education

Intercultural education has received increasing attention as a strategy for the inclusion of diverse students in mainstream education (Rutigliano, 2020[103]), particularly for students from a refugee or immigrant background (Portera, 2008[104]). A growing body of experts and academics have highlighted the necessity of implementing schools with an intercultural programme to enhance ethnic minority students' performance and well-being and to benefit society as a whole (OECD, 2010[105]; Kirova and Prochner, 2015[106]; Calogiannakis et al., 2018[107]; Vandekerckhove et al., 2019[108]; Rozzi, 2017[109]). Researchers have found that intercultural education can lead to intercultural competence, which can be defined as "the ability to interact effectively and appropriately in intercultural situations, based on one's intercultural knowledge, skills and attitudes" and is associated with empathy, flexibility and reflection (Rapanta and Trovão, 2021[110]). The results of a 2015 study on the impacts of programme implemented in Romania have also been interpreted as suggesting that intercultural education programmes may help promote more positive attitudes among teachers and students toward Roma (Nestian Sandu, 2015[111]).

The concept of intercultural education corresponds to a pedagogy based on "mutual understanding and recognition of similarities through dialogue" (Kirova and Prochner, 2015, p. 392[106]; Rutigliano, 2020[103]). The ultimate goal is to create a shared space where all students' cultural differences are valued, and not put aside or simply acknowledged. In this sense, the notion of interculturalism goes beyond that of multiculturalism which is limited to cohabitation and the acknowledgment of the existence of different cultures (Meer, 2014[112]). UNESCO (2006[113]) has identified three basic principles to guide international action in the field of intercultural education:

- Principle I: Intercultural Education respects the cultural identity of the learner through the provision of culturally appropriate and responsive quality education for all.
- Principle II: Intercultural Education provides every learner with the cultural knowledge, attitudes and skills necessary to achieve active and full participation in society.
- Principle III: Intercultural Education provides all learners with cultural knowledge, attitudes and skills that enable them to contribute to respect, understanding and solidarity among individuals, ethnic, social, cultural and religious groups and nations.

According to UNESCO (2006[113]), intercultural education should not represent a simple "add on" to the regular curriculum. It rather needs to be embedded into the learning environment as a whole, as well as other educational processes and features, such as teacher education and training, languages of instruction, teaching methods, and learning materials (ibid). Fostering an inclusive and intercultural approach in schools therefore requires actions at the different levels of an education system, i.e. clear legal and political frameworks, sufficient resources, capacity building and consistent changes at the school level in order to implement a new vision based on inclusion and diversity (Guthrie et al., 2019[9]). It can be seen as connected to the concept of Culturally Sustaining Pedagogy, which emphasises the need to sustain students' cultural and linguistic backgrounds and diversity in the classroom (discussed in more detail Culturally Sustaining Pedagogies). Intercultural education is also tightly linked to the involvement of the community as a whole (discussed further below), requiring both a commitment to creating an inclusive school atmosphere and a desire to strengthen the participation of all stakeholders in the design and implementation of such an environment.

In the European context, "intercultural education" was first referred to in an official capacity in 1983, when European ministers of education highlighted the intercultural dimension of education in a resolution regarding the schooling of immigrant children, and has featured in education projects promoted by the

Council of Europe since the mid-1980s (Portera, 2008[104]; Rapanta and Trovão, 2021[110]). It is now considered by the European Union as the official approach to be used in schools for the integration of immigrant and ethnic minority group students (Tarozzi, 2012[114]). Several European countries, such as Italy and Greece, have specific policies and/or legal frameworks on intercultural education (Tarozzi, 2012[114]; Rutigliano, 2020[103]). Ireland also had a specific strategy for intercultural education from 2010 to 2015, which aimed to ensure that (i) "experience an education that respects the diversity of values, beliefs, languages and traditions in Irish society and is conducted in a spirt of partnership" (reflecting the Education Act 1998) and (ii) "all education providers are assisted with ensuring that inclusion and integration within an intercultural learning environment become the norm" (Department of Education and Skills and the Office of the Minister for Integration, 2010[115]).

Pedagogical changes to reach all students

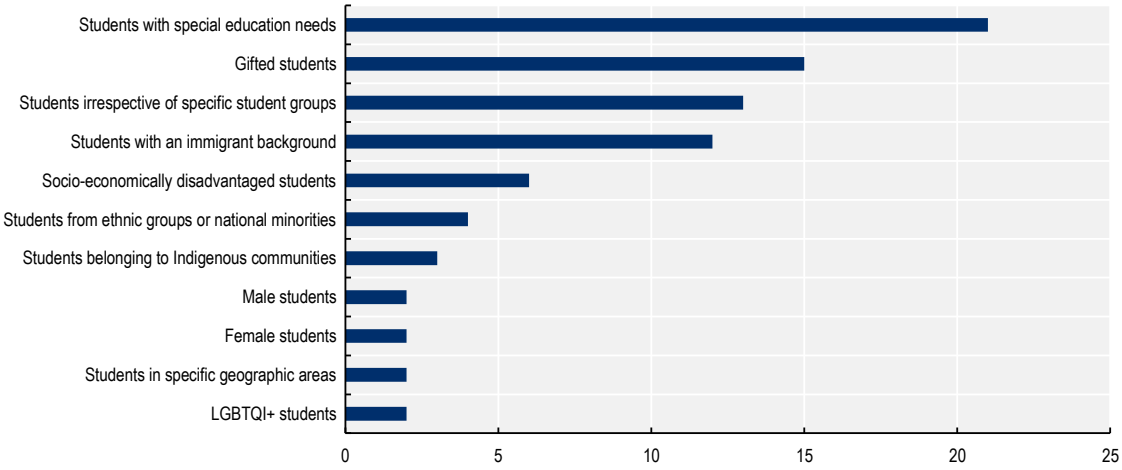
General pedagogical knowledge refers to "the specialised knowledge of teachers for creating effective teaching and learning environments for all students independent of subject matter" (Guerriero, 2017, p. 80[116]). It provides teachers with a common reflection ground and language to discuss their students' learning progress as well as well-being and ways to improve the teaching and learning support across subjects (Ulferts, 2021[117]). Teachers' general pedagogical knowledge is a crucial resource for effective teaching and learning, with research showing that general pedagogical knowledge is associated with higher quality teaching and better student outcomes (Ulferts, 2021[117]; Ulferts, 2019[118]).

The pedagogical knowledge of teachers also has specific implications for equity and inclusion in education. There is, for instance, a growing body of literature that shows that culturally responsive teaching practices - drawing on students' cultures and lived experiences to create authentic learning experiences in an environment that fosters critical engagement and mutual respect (Egbo, 2018[119]) - have a positive impact on not only students' learning (Cabrera et al., 2014[120]; Cammarota, 2007[121]; Dee and Penner, 2016[122]; Ulferts, 2021[117]) but also their engagement and psychological well-being (Cholewa et al., 2014[123]; Savage et al., 2011[124]). Research further indicates that culturally responsive teaching practices improve the school climate (Khalifa, Gooden and Davis, 2016[125]; Ulferts, 2019[118]) and can help to reduce the disproportionate representation of culturally and linguistically diverse students in special education programmes (Klingner et al., 2005[126]; Ulferts, 2019[118]).

A number of education systems reported requiring teachers at ISCED 2 level to adapt their pedagogical approaches to respond to different learners in the Strength through Diversity Policy Survey 2022 (Figure 5.4). This was most frequently reported as being required for students with SEN, by 21 education systems. In addition, 13 systems reported requiring teachers to adapt their pedagogical approaches to respond to all students, irrespective of student groups, and 15 to gifted students specifically. Twelve education systems reported requiring teachers to provide changes in their pedagogical approaches to support students with an immigrant background.

Figure 5.4. Changes in pedagogical approaches

Number of education systems reporting they require teachers at ISCED 2 level to provide changes in pedagogical approaches to different student groups



Note: This figure is based on answers to the question "Does the education policy framework in your jurisdiction require teachers at ISCED 2 level to provide diverse students with any of the following? [Changes in pedagogical approaches (e.g., differentiated pedagogy for gifted students)]". Thirty-one education systems responded to this question. Response options were not mutually exclusive.
Options selected have been ranked in descending order of the number of education systems.
Source: OECD (2022[81]), Strength through Diversity Policy Survey 2022.

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There is a wide number of pedagogical approaches that can be adopted by teachers to support the learning of all their students, based on their need and attitudes. The following sections discuss some of the most well-known teaching strategies for advancing equity and inclusion in education.

Differentiated instruction

Differentiated instruction, or differentiation, is an approach to teaching that has received increased attention in a context of growing diversity. Differentiated instruction has been defined as a philosophy for teaching that is grounded in the idea that students learn best when their teachers effectively address variance in their readiness levels, interests, and learning profile preferences (Tomlinson, 2005, p. 263[127]). It is based on a flexible approach to education that involves "building instruction from students' passions and capacities, helping students personalise their learning and assessments in ways that foster engagement and talents, and encouraging students to be ingenious" (OECD, 2018[66]; Rutigliano and Quarshie, 2021[38]). Differentiated instruction is at the core of equitable and inclusive education systems, as it means responding to and serving all student needs (OECD, 2022[128]), thereby supporting all learners in achieving their educational potential (OECD, 2012[129]). In the environment developed through differentiated instruction model, teachers, support staff and professionals collaborate to create an optimal learning experience for students: each student is valued for his or her unique strengths, while being offered opportunities to demonstrate skills through a variety of assessment techniques (Subban, 2006[130]). The differentiated classroom balances learning needs common to all students, with more specific needs tagged to individual learners, and can avoid the need for labelling students (ibid.).

Tomlinson (2001[131]) provides a comprehensive definition that sets out what differentiated instruction is and what it is not, the key elements of which are set out in Table 5.3 below. Based on this definition,

differentiated instruction can be summarised as a proactive, flexible and student-centred approach that provides multiple approaches to learning processes and content and that incorporates whole-class, group and individual teaching formats.

Table 5.3. What is differentiated instruction?

What differentiated instruction is not	What differentiated instruction is
Differentiated instruction is not the "individualised instruction" of the 1970s.	Differentiated instruction is proactive.
Differentiated instruction is not chaotic.	Differentiated instruction is more qualitative than quantitative.
Differentiated instruction is not just another way to provide homogeneous grouping	Differentiated instruction is rooted in assessment.
Differentiated instruction is not just "tailoring the same suit of clothes."	Differentiated instruction provides multiple approaches to content, process, and product.
	Differentiated instruction is student centered.
	Differentiated instruction is a blend of whole-class, group, and individual instruction.
	Differentiated instruction is "organic."

Source: Adapted from Tomlinson, C.A. (2001[131]), How To Differentiate Instruction In Mixed-Ability Classrooms, Association for Supervision and Curriculum Development, https://rutamaestra.santillana.com.co/wp-content/uploads/2020/01/Classrooms-2nd-Edition-By-Carol-Ann-Tomlinson.pdf (accessed 16 January 2023)

Differentiation is an approach to teaching that supports all learners in achieving their educational potential (UNESCO, n.d.[132]; OECD, 2022[128]), with studies indicating that it can have positive effects on student achievement (Smale-Jacobse et al., 2019[133]). It has been recognised as essential both to enhance the academic development of gifted students and to prevent the development of interpersonal challenges for gifted children (Beljan et al., 2006[134]). Differentiated instruction can also play an important role in the learning of immigrant students in the sense that it takes into account their proficiency in the host country language and ensures learning content is delivered in a way that is comprehensible (OECD, 2022[128]). The incorporation of tailored behavioural interventions and teaching practices also plays an important role in promoting the learning of students with SEN (Mezzanotte, 2020[7]). Box 5.3 provides an example of how teaching can be differentiated to support the specific needs of students with ADHD. Differentiated instruction can similarly be leveraged to support other students with similar SEN.

Box 5.3. Targeted academic instruction: an example for ADHD

Adapting academic instruction can help teachers support students with ADHD in achieving and fulfilling their potential (U.S. Department of Education, 2008[135]). Indeed, teachers can foster their students' academic success by differentiating teaching methodologies to address different learning needs (HADD Ireland, 2013[136]).

For instance, teachers can adopt specific strategies with respect to the timeline and structure of their lessons to address the learning needs of students with ADHD. As discussed by the US Department of Education (2008[135]), students with ADHD are more likely to learn best when they are situated in a structured lesson, where the teacher is able to clearly explain what they want students to learn and what they expect from them, both from an academic and a behavioural perspective. In this respect, a number of specific teaching practices at the start of the lesson can be helpful, such as preparing the students for the day's lesson by summarising the order of various activities planned and reviewing the

content that was studied during the previous lesson. In addition, teachers can specify how they expect the children to behave and act (such as speaking with a low tone to their classmates to work on an assignment or raising hands before speaking) and set out all the material students will need for the class.

While conducting the lesson, it is important for teachers to keep track of the children's understanding of the material by asking questions, divide work into smaller tasks that can foster the concentration, and provide follow-up directions both orally and in written form. In addition, as children with ADHD tend to struggle with transitions between lessons, preparing them for transitions from one lesson to the other can help them stay on task. Lastly, in terms of the conclusion of the lesson, it is helpful for teachers to notify students in advance, verify whether the assignments have been completed and instruct students on how to start preparing for the following lesson.

Table 5.4 summarises potential ways in which teachers can adapt their lessons and teaching to more effectively support students with ADHD.

Table 5.4. Academic instruction interventions

	Academic Instruction
Introducing lessons	Provide an advance organiser
	Review previous lessons
	Set learning expectations
	Set behavioural expectations
	State needed materials
	Explain additional resources
	Simplify instructions, choices, and scheduling
Conducting lessons	Be predictable: maintain structure of the lessons
	Support the student's participation in the classroom
	Use audio-visual materials
	Check student performance
	Ask probing questions
	Perform ongoing student evaluation
	Help students correct their own mistakes
	Help students focus
	Follow-up directions (oral/written)
	Lower noise level
	Divide work into smaller units
	Highlight key points
	Eliminate or reduce frequency of timed tests
	Use cooperative learning strategies
	Use assistive technology
Concluding lessons	Provide advance warnings
	Check assignments
	Preview the next lesson

Sources: Mezzanotte (2020[41]), Policy approaches and practices for the inclusion of students with attention-deficit hyperactivity disorder (ADHD), OECD Education Working Paper, No. 238, OECD Publishing, https://dx.doi.org/10.1787/49af95e0-en; US Department of Education (2008[135]), Teaching Children with Attention-Deficit/Hyperactivity Disorder: Instructional Strategies and Practices, https://www2.ed.gov/rschstat/research/pubs/adhd/adhd-teaching.html (accessed 19 December 2022).

Culturally Sustaining Pedagogies

As noted above, Culturally Sustaining Pedagogy (CSP) is a concept for teaching that emphasises the need to sustain students' cultural and linguistic backgrounds and diversity in the classroom. It builds on asset-based pedagogical research that counters deficit views regarding students of colour, especially

those who are from a socio-economically disadvantaged background (Waitoller and King Thorius, 2016[97]). Asset pedagogies argue that learning is a lifelong process of intersecting cultural practices and all students' cultural practices matter. Asset-based pedagogical research includes Ladson-Billings' (1995[137]) work on Culturally Relevant Pedagogy, which focuses on affirming the backgrounds of students of colour (California Department of Education, 2022[138]). The concept of CSP was introduced by Paris (2012[139]) to emphasise that asset pedagogies should be more than responsive to students of colour, supporting students to "perpetuate and foster – to sustain - linguistic, literate, and cultural pluralism as part of the democratic project of schooling and as a needed response to demographic and social change." Rather than merely being relevant for or responsive to certain cultures, CSP seeks to sustain linguistic and cultural pluralism in the classroom (Paris, 2012[139]). Similarly to how intercultural education has been recognised as needing to be embedded into the learning environment as a whole, CSP involves centring students' languages, cultures, literacies and ways of being meaningfully and consistently in classroom learning, rather than approaching them as "add-ons" (California Department of Education, 2022[138]).

Waitoller and King Thorius (2016[97]) argue that CSP should be cross-pollinated with Universal Design for Learning (discussed above), as a way to develop an inclusive pedagogy that also accounts for disability. Indeed, they argue that recent work at the intersection of disability studies, special education and critical race studies in education have examined and underlined the relationship between racism and ableism as one of the intersecting drivers of inclusion (see for instance Annamma et al. (2013[140])). Box 5.4 discusses why and how CSP and UDL can be cross-pollinated to tackle the intersection between ethnicity and SEN.

Box 5.4. Cross-pollinating Culturally Sustaining Pedagogies and Universal Design for Learning

The troubling relationship between racism and ableism

Paris and Alim (2014[141]) provide four main reasons why a UDL/CSP cross-pollination is necessary to foster inclusive education.[6] First, they argue that scientific, political and economic purposes have solidified, throughout history, the relationship between racisms and ableism[7] (Paris and Alim, 2014[141]). These phenomena have had detrimental effects for both students from ethnic minorities and students with disabilities. Second, they underline that both racism and ableism are based on social constructs within a relational system (Leonardo, 2009[142]). Indeed, the two concepts have their origin in the attribution of otherness and deviance from cultural beliefs of the norm: black being other from white, and disabled being other from able. Third, the effects of racism and ableism are tangible in societies and in schools, and work as interlocking systems of oppression. Fourth, racism and ableism have to be dismantled together to address complex challenges to equity issues. For example, the fact that black male students are generally disproportionately over-identified for special education services and placed in segregated settings, cannot be explained by examining only racism or ableism (U.S. Department of Education, 2014[143]).

Given this rationale, the authors argue that there are three areas in which CSP can be extended by incorporating elements of UDL, and vice versa, as shown in Table 5.5.

Table 5.5. How to cross-pollinate CSP and UDL

Extending CSP through UDL	Extending UDL through CSP
CSP must explicitly consider disability as an essential component in the construction of fluid cultural identities.	UDL can be extended to nurture learners who interrogate multiple forms of oppression and who make themselves as key participants in a pluralistic democracy.
CSP attention to cultural aspects needs to be concretised in school curricula, by explicitly including ability pluralism within the goal of sustaining cultural pluralism.	A key element of CSP, critical reflexivity, could strengthen UDL's critique of traditional curricula beyond discussing the barriers to access for students. It would thus refuse a noncritical approach to the

	construction of disability as a dimension of diversity and refuse hierarchy between ability and disability.
Extending CSP needs to discuss which cultural aspects of disability it should conserve, in particular in relation to labels. Questioning the role and use of labels can support students navigate the creation of their identity and their relation with labels.	ULD can be extended to address the role of power and privilege in shaping and block learning opportunities from an intersectional perspective between disability and ethnicity.

The CSP/UDL cross-pollination has implications for teachers, teachers' educators and researchers. It implies a need for teachers to engage with pedagogies that aim to dismantle intersecting forms of oppression and requires teacher preparation programmes to account for these goals.

Paris and Alim acknowledge that the proposed framework is incomplete, and that there are other dimensions of diversity that are impacted by different forms of oppression, which may intersect in different ways.

Source: Adapted from Paris and Alim (2014[141]), What Are We Seeking to Sustain Through Culturally Sustaining Pedagogy? A Loving Critique Forward, Harvard Educational Review, https://doi.org/10.17763/haer.84.1.982l873k2ht16m77.

Use of digital technologies to foster equity and inclusion

Digital technologies, if used effectively, can help to facilitate the inclusion and promote the academic outcomes of all students (Gottschalk and Weise, Forthcoming[144]) and thus contribute to reducing inequities in education. Digital technologies can play an important role in supporting teachers in adapting to different learning styles (OECD, 2021[145]) and in meeting students' particular needs (Cerna et al., 2021[40]). As is discussed in more detail below, digital and assistive technologies can be key in supporting the learning outcomes of students with SEN (Gottschalk and Weise, Forthcoming[144]) and gifted students (Rutigliano and Quarshie, 2021[38]). In addition, they can be used to provide language and comprehension assistance for students from immigrant backgrounds (Cerna et al., 2021[40]). In Victoria, Australia, for example, the Virtual English as Additional Language New Arrivals Programme provides newly arrived students with the opportunity to learn English online if the school they are attending cannot provide them with language support. Systems such as Skype and Moodle are used to develop the students' English language proficiency and support them in being able to access the mainstream curriculum (Cerna et al., 2019[146]). Some municipalities in Sweden are also working with digital platforms in order to be able to offer mother tongue study supervision for students whose first language is not Swedish (Cerna et al., 2019[146]). Digital technologies can further enhance communication and collaboration between the different actors involved in supporting students. For instance, they may be used to allow various stakeholders to share information to support the inclusion and educational outcomes of students who live in marginalised areas or communities and who face barriers in accessing education, such as Roma students (Rutigliano, 2020[103]).

Digital technologies can also help improve access to learning for students who struggle in formal learning contexts, live in rural or isolated areas or who may otherwise be unable to attend school on a regular basis (FutureLab, n.d.[147]). In the context of COVID-19, online learning platforms played a crucial role in allowing students in various education systems to continue their education despite school closures. In some education systems, such as Chile and Slovenia, computers and other electronic devices were distributed to students without access to technology (OECD, 2020[148]). Technology has also been used for a number of years in New South Wales Australia to provide distance education through both real-time remote teaching sessions and non-real-time learning support (Cerna et al., 2019[146]; New South Wales Government, 2017[149]).

Digital and assistive technologies to support students with SEN

Assistive technology (AT) can help support the inclusion of individuals with SEN and disabilities in education, along with various other domains of life (Brussino, 2020[68]; UNESCO, 2010[150]). The need for AT is usually assessed when designing students' IEPs (as discussed above in the section Individual Education Plans).

Empirical evidence shows that AT helps students in overcoming significant learning barriers posed by learning disabilities such as dyslexia and dysgraphia (Couteret, 2009[151]). Low-technology AT tools include adapted pencils and papers, word processing software, audiobooks, reading trackers and enlarged texts. Assistive technology advantages concern both students' academic and social outcomes (Brussino, 2020[68]) . Assistive technology can have positive impacts on students' academic outcomes (ibid.). For example, it can improve students' ability to acquire and develop skills such as handwriting, reading, and visual skills, as well as enhancing their problem-solving ability and attention span. From a socio-emotional perspective, AT can contribute to enhancing students' independence, social interactions, motivation and self-esteem (Copley and Ziviani, 2004[152]). For instance, video-self monitoring – which uses model videos to teach behaviours and skills – and e-book AT appear to have great potential for students with Emotional Behaviour Disorders to develop and sustain social relationships with peers (Murry, 2018[153]).

In addition, more advanced digital technologies can play an important role in supporting the academic and well-being outcomes of students with SEN (Gottschalk and Weise, Forthcoming[144]), and have been associated with increased motivation, engagement and confidence (Benmarrakchi, El Kafi and Elhore, 2017[154]; OECD, 2021[155]). For example, devices using augmented reality can support knowledge assimilation (Hrishikesh and Nair, 2016[156]), problem solving and collaboration with others through providing students with different ideas and ways of interacting with others (Cascales-Martínez et al., 2016[157]). Research suggests that augmented reality devices can benefit a range of students with SEN, including those with auditory limitations, visual limitations, autism, ADHD and dyslexia (Quintero et al., 2019[158]). Tools such as social robots have also been associated with outcomes such as increased self-regulation and decreased anxiety in children with autism spectrum disorder (Brussino, 2020[68]), as is discussed in Box 5.5 below.

Box 5.5. Social robots for students with autism spectrum disorder

There has been increasing interest in the potential of social robots in supporting the learning of students with diverse SEN, including students with autism spectrum disorders (ASD). A variety of humanoid artificial intelligence robots have been designed to interact with and help promote the social and communication skills of students on the autism spectrum. Research suggests that these social robots may increase the capabilities of students with ASD to self-regulate their emotions, improve their attention spans and decrease their levels of social anxiety. Social robots can be highly adaptive to individual students' needs, educational objectives and personal characteristics, and therefore have the potential to be effective tools in supporting the learning and facilitating the inclusion of students with diverse SEN. Additionally, social robots can support teachers and families in following students' learning, development and growth.

However, as the growth pace of this new technology has been faster than research in the field, further investigation is needed regarding the efficacy of social robots for students with ASD still needs to be further investigated. While preliminary findings show positive impacts of social robots on the educational and social life of students on the autism spectrum, there are also key challenges to be addressed, including high costs, teacher training and social acceptance of robot usage.

Sources: Alcorn, A. et al. (2019), "Educators' Views on Using Humanoid Robots With Autistic Learners in Special Education Settings in England", Frontiers in Robotics and AI, Vol. 6, p. 107, https://doi.org/10.3389/frobt.2019.00107; Hooft Graafland, J. (2018), "New

technologies and 21st century children: Recent trends and outcomes", OECD Education Working Papers, No. 179, OECD Publishing, Paris, https://dx.doi.org/10.1787/e071a505-en ; Weir, W. (2018), "Robots help children with autism improve social skills", YaleNews, https://news.yale.edu/2018/08/22/robots-help-children-autism-improve-social-skills#:~:text=Known as social robots%2C the,individual child's ways of learning (accessed 8 June 2020).

Assistive technology is not only beneficial in supporting the learning of students with SEN, but also in increasing teacher awareness of students with SEN's cognitive experiences and improving the overall quality of teaching (Brussino, 2020[68]). For example, evidence shows that experiencing various types of simulated dyslexia with virtual reality fosters teacher awareness of the cognitive experiences of students with dyslexia (Passig, 2011[159]) as it allows teachers to better empathise with students and understand the needs arising from dyslexia, therefore promoting quality education for students with SEN.

While the effective use of assistive technologies can have positive impacts on students' academic outcomes and overall well-being, there are challenges that may arise in the use of AT to support the inclusion of students with SEN in schools (Brussino, 2020[68]). Inadequate training for teachers can, for instance, be a major obstacle to making effective use of AT (OECD, 2015[160]). Limits to the effectiveness of AT can also arise when the assessment of a student's SEN is poorly carried out and when there is an inadequate identification of the necessary AT equipment to support a student's learning activities (Copley and Ziviani, 2004[152]). The effectiveness of AT usage could also be limited if schools lack sufficient financial resources to afford and sustain the costs of needed AT devices (ibid.). The time taken to obtain and prepare the equipment and to train students and teachers on how to use it may also hamper the effectiveness of AT. Finally, the effectiveness of AT could be also challenged by the risk of stigmatisation arising from AT usage. This could be due to reasons related to perceived gender and age appropriateness of AT device aesthetics induced by diffused stereotypes, such as gender stereotypes linked to colours. Stigmatisation due to AT usage could also be triggered by other factors, such as teachers' negative attitudes in supporting students with SEN who deploy AT in the classroom (Parette and Scherer, 2004[161]). It is therefore important that the advantages and disadvantages of AT (which are summarised in Table 5.6 below) are carefully assessed in the development of school-level interventions policies and strategies.

Table 5.6. Advantages and disadvantages of assistive technology

Advantages	Disadvantages
• AT can contribute to enhancing students' independence, social interactions, motivation and self-esteem. • AT can improve students' ability to acquire and strengthen skills such as handwriting, reading and visual skills, as well as enhancing their problem-solving ability and attention span. • AT can also be economically convenient (e.g., digital examination papers can be more independent and cost-effective means compared to readers and/or scribes).	• Limits for AT if teachers and school personnel are not adequately trained. • Challenges when there is an inadequate assessment of SEN and planning of interventions. • Scarcity of resources to afford and maintain necessary AT equipment and finance training can challenge AT effectiveness. • Insufficient timing challenges effectiveness of training, assessment and planning, equipment provision, and service delivery.

Sources: Adapted from Brussino (2020[68]), Mapping policy approaches and practices for the inclusion of students with special education needs, OECD Education Working Papers, No. 227, https://doi.org/10.1787/600fbad5-en.

Digital technologies to support gifted students

Digital technologies can also support the academic outcomes and well-being of gifted students (Gottschalk and Weise, Forthcoming[144]). There is consensus within the gifted education literature that technology, if properly used, may improve the effectiveness and quality of gifted education programmes, including by

creating online learning communities, allowing distance mentoring practices and supporting the development of critical thinking and creativity skills (Chen, Yun Dai and Zhou, 2013[162]). Benefits for individual students include expanded access to resources that can accelerate content and learning (Rutigliano and Quarshie, 2021[38]) and the potential for enrichment through differentiation (Siegle, 2013[163]). Expanded information, digital books, interactive projects, advanced classes in the digital environment, online publishing and virtual mentoring are examples of ways in which digital tools can facilitate enrichment for gifted students.

Several studies show that online personalised assessments allowed for better monitoring and evaluation of strategies involved in critical thinking for gifted students (Chen, Yun Dai and Zhou, 2013[162]; Cope and Suppes, 2002[164]). For example, Computerised Adaptive Testing personalises the difficulty of questions in real-time depending on correct or incorrect responses. It provides fast, precise and thorough feedback so that learning can be better personalised (Olson, 2005[165]). In addition, inclusive digital tools can improve motivation across content and tasks by stimulating and extending learning opportunities while giving more flexibility for students to pursue their individual interests (Olszewski-Kubilius and Lee, 2004[86]; Periathiruvadi and Rinn, 2012[166]; Rutigliano and Quarshie, 2021[38]).

Digital technology may also help to reduce gaps in access to educational opportunities for disadvantaged gifted students (Rutigliano and Quarshie, 2021[38]). Research shows that it can support the learning of gifted students who have physical impairments are live in challenging and remote geographical locations (Rutigliano and Quarshie, 2021[38]; Chen, Yun Dai and Zhou, 2013[162]). As such, free learning portals can be essential for gifted learners from low socio-economic backgrounds or rural areas who would otherwise be unable to access such courses and learning opportunities (Rutigliano and Quarshie, 2021[38]). It should be noted, however, that, while access to online learning portals can provide valuable support for gifted students, they may lack an interpersonal social interaction element that is important for their well-being (Centre for Education Statistics and Evaluation, 2019[36]).

Gaps in teacher education and training, both on the use of digital technologies and on gifted education (see Chapter 4), may represent a challenge in the effective implementation of digital technologies to support gifted students (Rutigliano and Quarshie, 2021[38]). TALIS 2018 estimates that across participating countries, 44% of teachers do not receive digital technology training during their formal teacher education and training and slightly more than 40% of them feel well or very well prepared to use technology in the classroom (OECD, 2019[167]). Consistent digital technology skills for teachers are needed not only to promote gifted students' learning, but also to ensure students' safety and access to appropriate information when using such tools (Rutigliano and Quarshie, 2021[38]).

Ensuring equitable and inclusive assessment practices

There is a large body of research showing that the type of assessment can have a strong impact on student learning outcomes (OECD, 2013[67]). Evidence on different approaches indicates that assessment may support or diminish student motivation and performance depending on the way it is designed, implemented and used. Assessments that are not well designed and implemented can contribute to alienating students (and teachers) from the education system and exacerbate inequity in education. By contrast, carefully planned assessment interventions that are well aligned with learning goals and that place students at the centre of the process can raise achievement and reduce disparities (ibid.).

The assessment literature has traditionally made a distinction between assessment for summative purposes and assessment for formative purposes. Student summative assessment, or assessment *of* learning, aims to summarise learning that has taken place, in order to record, mark or certify achievements; whereas student formative assessment, or assessment *for* learning, aims to identify aspects of learning as it is developing in order to deepen and shape subsequent learning (OECD, 2013[67]).

Diagnostic assessment to evaluate student needs

While some authors make a distinction between formative assessment and diagnostic assessment, the OECD generally considers diagnostic assessment as type or aspect of formative assessment. Diagnostic assessment often takes place at the beginning of a study unit in order to find a starting point, or baseline, for learning and to develop a suitable learning programme (OECD, 2013[67]).

Diagnostic assessment typically focuses on very specific areas of learning and produces fine-grained information about individual student strengths, weaknesses and learning needs. Many diagnostic tools are designed specifically to uncover the causes of students' learning difficulties. The results of diagnostic assessment are typically used to inform future programme planning, design differentiated instruction and deliver remedial programmes for at-risk students. The distinctive feature of diagnostic assessment, with respect to formative assessment more generally, is its greater focus on the use of results for individualised intervention and/or remediation. Indeed, diagnostic assessments are often used to identify students who are at risk of failure, uncover the sources of their learning difficulties, evaluate their learning needs, and plan for appropriate interventions or remediation strategies (OECD, 2013[67]).

For instance, various OECD countries implement early diagnostic assessments to develop IEPs for refugee children (Cerna, 2019[35]). This is intended to support them to learn the host country language, overcome interruptions in schooling and fully benefit from learning opportunities. In Sweden, early initial assessment is essential in providing language support to immigrant students as it is an important starting point in the language learning process (Siarova and Essomba, 2014[168]). Within two months of starting school, all new arrivals are assessed on their academic knowledge and language skills. Academic knowledge assessments are offered in the students' mother tongues in order to best assess previous knowledge without language barriers (Berglund, 2017[169]). School leaders use the results to determine the best educational trajectory for the student, taking into account the student's age and language skills and results of the mapping of existing academic knowledge (Bunar, 2017[78]). For example, if a student demonstrates good knowledge in a subject, they can then participate in regular teaching of that subject with mother tongue study supervision (i.e., tutors in the student's native language) (Cerna, 2019[35]).

Assessment in school can also be implemented to identify students' SEN, as teachers often play an active role in the identification of learning disabilities or certain developmental disorders such as in the case of ADHD (Mezzanotte, 2020[41]). Diagnostic assessments are also used to identify the needs of students embodying more than one dimension of diversity who could require additional support. This can be the case, for instance, for students with an immigrant background who are suspected to have one or more SEN (Brussino, 2020[68]). Across Canada, many school boards have put in place specific services to diagnose and address any SEN immigrant students may have (Education International, 2017[170]). While early and well-timed identification of special education needs is important, in the case of migrant/refugee students the diagnosis of SEN may sometimes require some delay in order to get an accurate assessment of the student's learning needs and to carefully take into account conditions related to trauma and linguistic and/or culturally different behavioural attitudes (Canadian Counselling and Psychotherapy Association, 2013[171]). In this respect, the specialised counselling services for immigrant students in place across Canada are intended to detect and address SEN taking into account the challenges and difficulties that may have arisen from the students' migration experiences (Education International, 2017[170]).

Bias risk in assessment design and teacher-based assessment

Several studies indicate that certain formats of assessment may advantage or disadvantage certain student groups (Gipps and Stobart, 2004[172]; OECD, 2013[67]), which raises issues in terms of equity in education (OECD, 2013[67]). Test bias is defined as the differential validity of a test between specific sub-groups of students (Sattler, 1992[173]). There are a variety of ways in which assessments can be biased: unnecessary linguistic complexity, for instance, is an example of context-irrelevant bias in assessment, particularly when testing students who do not speak the language of instruction and

assessment at home (OECD, 2013[67]). There may also be bias in content validity when the choice of a particular set of knowledge and skills is likely to privilege certain groups of students over others (Klenowski, 2009[174]). In addition, there may be bias in item selection, which is related to how one item is included in the test while another is not. While an overall test may not be biased statistically, a few items in it may be. Finally, the choice of method may also lead to bias for certain groups, depending on their familiarity with the general idea of a test, the motivational context in which the test is taken and the frequently implicit assumptions about appropriate behaviour in such a context. For instance, students that have dysgraphia or dyslexia may struggle with written assignments if they do not receive appropriate accommodations.

There are also risks of conscious or unconscious bias in teacher-based assessment, which go beyond the risks of biases in assessment design mentioned above. Bias in teachers' assessment may be related to teachers' prior knowledge of student characteristics such as behaviour, gender, SEN, immigrant background, first language, overall academic achievement or verbal ability (OECD, 2013[67]). For example, the OECD (2015[175]) has found that teachers generally tend to award higher grades to girls than to boys, given what would be expected considering their performance in PISA 2012 (Brussino, 2021[100]). The fact that the gender gap in grading appears much wider in language-of-instruction courses than in mathematics suggests that teachers' evaluations may be affected by conscious or unconscious gender stereotyped biases concerning girls' and boys' strengths and weaknesses in school subjects (ibid.). Research has also shown that girls tend to score higher than boys in maths when name-blind tests are carried out, whereas boys tend to receive higher grades when assessments are not name-blinded (Lavy and Sand, 2015[176]).

Advancing equity in assessment design and teacher-based assessment

Assessments should allow all students to show what they have learned and understood, without being disadvantaged by individual characteristics that are irrelevant to what is being assessed (Binkley et al., 2010[177]; Abd Razak and Lamola, 2019[178]). Assessment therefore needs to be appropriate for students at different developmental levels, and sensitive to the needs of particular groups, such as ethnic minorities, non-native speakers and students with SEN (OECD, 2013[67]). To ensure fairness in assessment for all students, it is important to develop frameworks for equitable assessment for the wide range of different student groups without privileging one group over another (OECD, 2013[67]). The development of a broad framework for equity in assessment for all students requires central guidelines for orientation and coherence across educational settings, but it should at the same time allow for flexibility and adaptability of practices at the local and school level (OECD, 2013[67]).

The Educational Testing Service has published the International Principles for the Fairness of Assessments, which are intended to serve as a basis for developing appropriate guidelines for the fairness of tests and assessments in particular education systems (Educational Testing Service, 2016[179]). The key principles are as follows:

- **Measure the important aspects of the relevant content**: A test that does not measure the important aspects of the intended content cannot be valid. Because of the close link between validity and fairness, an invalid test is not likely to be fair. Therefore, any material that is important for valid measurement may be acceptable for inclusion in a test, even if it would otherwise be out of compliance with the guidelines.
- **Avoid irrelevant cognitive barriers to the performance of test takers**: Unfair barriers may occur when knowledge or skill not related to the purpose of the test is required to answer an item correctly.
- **Avoid irrelevant emotional barriers to the performance of test takers**: Unfair barriers may occur if unnecessary language or images cause strong emotions that may interfere with the ability to respond to an item correctly.
- **Avoid irrelevant physical barriers to the performance of test takers**: Unfair barriers may occur (most often for test takers with SEN) if unnecessary aspects of tests interfere with the test takers'

ability to attend to, see, hear, or otherwise sense the items or stimuli and respond to them. For example, test takers who are visually impaired may have trouble understanding a diagram with labels in a small font, even if they have the knowledge and skills that are supposed to be tested by the item based on the diagram.

In teacher-based assessment, a careful examination of the tone and framing of the assessment and questions can help mitigate the risk of bias towards students from diverse backgrounds (Brussino, 2021[100]). It is important that teachers are aware of diverse cultural ways of communicating and participating that may affect the performance of students from immigrant backgrounds in the assessment process (Nortvedt et al., 2020[180]; Brussino, 2021[100]).

Improving equity through multiple assessment opportunities

Since it is very difficult to make assessment fully inclusive and neutral – as formats, contents, constructs, and methods may be biased in some direction – a mix of different versions of format, content and construct may help ensure fairer assessment (OECD, 2013[67]). The OECD therefore recommends that high-stakes decisions about students should not be based on the results of one test alone. A more equitable approach is to collect multiple data using a range of assessment tasks involving a variety of contexts, response formats and styles, and draw on this in the decision-making process. This broader approach is likely to offer students alternative opportunities to demonstrate their performance if they are disadvantaged by any one particular assessment in the programme (Gipps and Stobart, 2009[181]). It is also important that the format and design of different assessment instruments is informed by research on effective approaches for diverse student groups. Moreover, in areas where there is limited evidence, as in the case of inclusive assessment for students from ethnic minorities, education systems should encourage the development of more research to extend the knowledge and evidence base (OECD, 2013[67]).

Using a range of assessment techniques can help build students' motivation, confidence and achievement (OECD, 2017[47]). Using a broad range of assessments can provide a more comprehensive overview of students' strengths and build a more enduring sense of efficacy and achievement. In addition, ensuring that all students are acknowledged for what they know and can do and their interests and aspirations is important for student motivation (OECD, 2017[47]). For instance, New Zealand's National Certificate of Education Achievement focuses on recognising, in senior (upper) secondary schools, what students know and can do, and values a wide body of knowledge, including knowledge related to Indigenous culture and language (OECD, 2017[47]). It uses a range of assessment methodologies, allows credits to be collated across a range of subject areas, and offers flexibility in terms of the timeframe in which students can complete a particular qualification level. Indigenous students have shown improved outcomes in achieving qualifications under this more flexible system.

Adapting assessment formats to foster inclusion

Inclusive assessment systems are those that are developed based on the principle that all students should have the opportunity to participate in educational activities, including assessment activities, and to demonstrate their knowledge, skills and competencies in a fair way (OECD, 2013[67]). In addition to avoiding potential bias, this involves a sensitivity to the different needs of diverse students and an understanding of how assessments can be adapted to accommodate these (ibid).

The Scottish Government recognises the importance of inclusive assessment approaches in its Gender Equality Toolkit for Education Staff. The Toolkit recommends that education staff use a variety of assessment modes "to provide all learners with the opportunity to produce their best performance (e.g., oral questions, written answers, multiple choice, observation of group work)". It also encourages the use of assessment information to identify and plan future learning, recommending that assessment criteria be reviewed for bias where one gender out-performs the other and that positive steps be "taken to

acknowledge success and encourage ambition from all children and young people" (Scottish Executive, 2007[182]).

There are a variety of ways in which assessments can be adapted or structured to serve students with SEN. For instance, for students with ADHD, eliminating or reducing timed tests can be an effective strategy to support them, together with technology to assist them with tasks (Mezzanotte, 2020[7]), with assistive technology more generally suitable to supporting students with different special education needs in the assessment process (Brussino, 2020[68]; Brussino, 2021[100]). An inclusive approach to assessment for students with SEN requires an acknowledgement that every student is unique and the selection of appropriate strategies in light of the needs of the particular student (All Children Learning, n.d.[183]). In Australia, the Checklist of Learning and Assessment Adjustments for Students is a tool that was developed to help teachers select and document adjustments to support students with additional needs in classroom and external assessment (as well as in classroom instruction), drawing from previous research on instructional and testing accessibility. A study examining its application concluded that it has the potential to help ensure equitable assessment opportunities for students with SEN (Davies, Elliott and Cumming, 2016[184]).

Accommodation or adjustments in terms of language can be crucial to ensure inclusive assessment for students from an immigrant or refugee background (OECD, 2013[67]). Several education systems across the OECD have implemented a range of options for students to be assessed in their first language, which include administrating the assessment orally with an assessor who speaks the student's mother tongue, or translating or developing assessment instruments in the student's first language. Another approach is to reduce the linguistic complexity of the assessment through measures such as simplification or modification of test elements and permitting the use of dictionaries or glossaries. It should be noted, however, that empirical evidence relating to the effectiveness and efficiency of language accommodation measures in assessment is varied and, at times, contradictory (ibid.). Further research would be beneficial to advance understanding on how assessment processes can be made more inclusive for students whose first language differs from the language of instruction.

Using assessment results to meet students' learning needs

The way in which the information obtained through student assessment is used is also a factor that impacts on the equity and inclusiveness of education systems. Indeed, there is strong evidence on the power of assessment in shaping new teaching and learning strategies and on the strong relationship between assessment for learning and improvements of student learning outcomes (OECD, 2013[67]). Regular summative reporting can help engage parents or guardians in supporting their child's learning. Information gained through both formative assessment plays a critical role in identifying students' learning needs and in the development and refinement of teaching strategies to meet these. Records of student achievement can also assist in-school communication among school staff regarding student progress and inform decisions about additional targeted support that may be needed (ibid.). PISA 2018 results indicate that, in countries or economies with greater equity in education, student assessments are used to inform parents about their child's progress and to identify aspects of instruction and the curriculum that can be improved. For instance, across OECD countries, the higher the percentage of students in schools that use student assessments to inform parents about their child's progress, the weaker the relationship between students' socio-economic status and their performance in reading (OECD, 2020[26]).

Information obtained through assessment can also feed into the school-wide coordination of pedagogical support and can play a critical role in developing effective and timely intervention strategies for students facing learning difficulties or who are at risk of falling behind or not achieving their educational potential (OECD, 2013[67]). Evidence indicates that appropriate early educational interventions can have substantive effects on cognition, socio-emotional development and student learning outcomes (Barnett, 2011[185]; Travers, 2018[37]), and can have positive impacts on the progress and adult success of children from

disadvantaged socio-economic backgrounds (Barnett, 2011[185]). Providing appropriate early interventions within school is important from an equity perspective, as it ensures that access to additional support is not just limited to those families with the means to pay for tutoring and other remediation support delivered by private providers outside school (Travers, 2018[37]). This appears particularly crucial in light of the fact that, across OECD countries, students' socio-economic status has been shown to impact on students' academic performance (Ikeda, 2022[186]). In Australia, the New South Wales Department of Education provides specialist early intervention support services (which complement programmes provided by other government and non-government agencies). These include early intervention support class sessions (which young children with a young support need or disability attend two or three times a week), resource support from dedicated early intervention teachers to children attending an ECEC centre, and transition support teachers, who support local schools in providing successful transitions for children with significant support needs or a disability (NSW Department of Education, 2021[187]).

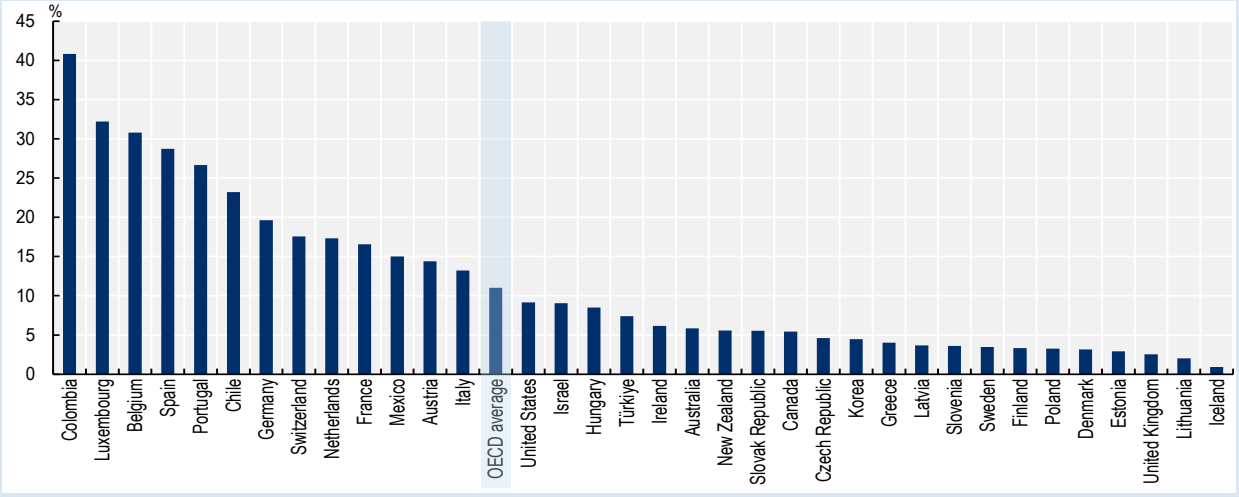
Intervening early when there are indications that a student may be facing difficulties has also been recognised as being much more effective than strategies that seek to help students catch up once they have fallen behind (Travers, 2018[37]). Indeed, grade repetition, which is used in several education systems to address individual student low achievement, has been widely shown to impact negatively on student learning outcomes as well as raising concerns for equity and inclusion in education (Box 5.6).

Box 5.6. Grade repetition

Grade repetition refers to when students are retained in the same school grade for an extra year rather than moving up to a higher grade along with their age peers (Brophy, 2006[188]). Despite some research suggesting that repeating a grade generally does not yield improvements in students' learning outcomes and is associated with high economic and social costs, grade repetition is still commonly used in many OECD countries (OECD, 2022[128]; OECD, 2016[3]).

Figure 5.5. Grade repetition in OECD countries (PISA 2018)

15-year-old students who reported that they had repeated a grade at least once in primary, lower secondary or upper secondary school (%)



Note: Data for Japan and Norway is missing from this figure.
Source: OECD (2020[26]), PISA 2018 Results (Volume V): Effective Policies, Successful Schools, Figure V.2.5, https://doi.org/10.1787/ca768d40-en.

While determinations regarding grade repetition are usually officially made on the basis of students' academic performance, some studies suggest that students' behaviour and other factors can also influence the decision in practice (OECD, 2022[128]; OECD, 2015[189]). Results from PISA 2015 show that students who reported that they had missed a day of school or had arrived late for school at least once in the two weeks prior to the PISA test were 38% and 24% more likely, respectively, to have repeated a grade than students who reported that they had not done so (OECD, 2022[128]; OECD, 2015[189]).

Impacts on learning outcomes

Evidence has shown that, while grade repetition can improve academic achievement temporarily, in the long-term those who have repeated a grade tend to fall further and further behind other students with low achievement who were promoted with their age peers (Brophy, 2006[188]; OECD, 2013[67]). Results from PISA 2018 show a negative relationship between grade repetition and reading performance, at both the student level and the system level. The percentage of students who had repeated a grade at least once was negatively correlated with mean performance in reading in all participating countries and economies. Participating countries and economies with smaller shares of students who had repeated a grade generally showed higher mean performance in PISA (OECD, 2020[26]).

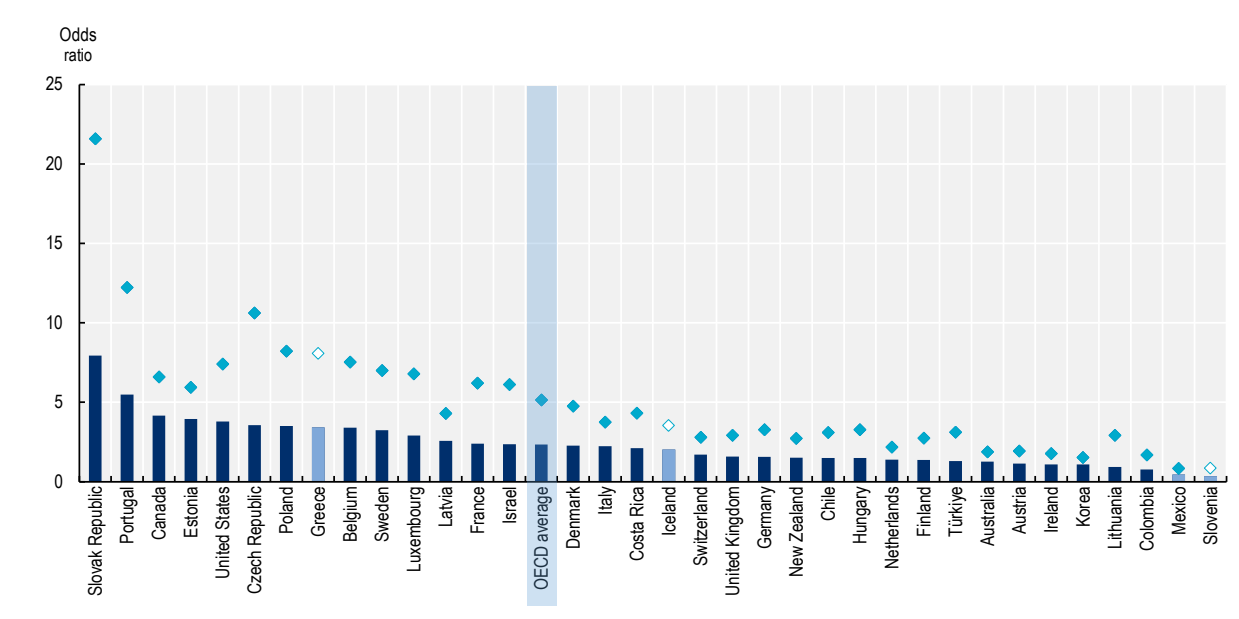
Effects on students' sense of belonging to school

Research has further shown that grade repetition is associated with reduced self-esteem among students, can impair their relationships with their peers and can increase their sense of alienation from school (Jimerson et al., 2005[190]) – which can increase the likelihood of them dropping out of school (OECD, 2013[67]). Empirical evidence suggests that students who have been held back a year hold more negative attitudes towards school at the age of 15 than students who had not repeated a grade in primary or secondary education (OECD, 2022[128]). Students who have repeated a grade have also been found to be more likely to drop out of school (Manacorda, 2012[191]; OECD, 2022[128]). Research indicates that grade retention can negatively affect students'' well-being, their sense of belonging to the school community and their life satisfaction. On average across EU countries in 2015, students who had repeated a grade were six percentage points less likely to report being satisfied with life (OECD, 2022[128]; OECD, 2018[54]).

Equity concerns

Grade repetition has been recognised as negatively impacting on educational equity, with research showing that students with certain characteristics are more likely to have repeated a grade in many education systems (OECD, 2022[128]; OECD, 2015[189]). The probability of grade repetition has been found to be associated with a student's socio-economic status (De Witte et al., 2018[192]), with evidence showing that socio-economically disadvantaged students are more likely than advantaged students to repeat a grade across OECD countries (OECD, 2022[128]; OECD, 2015[189]; OECD, 2020[26]). In addition, across OECD countries, students with an immigrant background are more likely to repeat than students with a non-immigrant background, and boys are more likely than girls (OECD, 2022[128]; OECD, 2015[189]). Data from Australia also indicate that Indigenous students may be more at risk of repeating, at least at the primary level (Anderson, 2014[193]). Results from PISA 2018 further showed that participating countries and economies with smaller shares of students who had repeated a grade generally showed greater equity in education, with the percentage of students who had repeated a grade at least once being negatively correlated with equity in reading performance across all participating countries (OECD, 2020[26]).

Figure 5.6. Grade repetition, socio-economic status and reading performance (PISA 2018)



Note: The socio-economic profile is measured by the PISA index of economic, social and cultural status (ESCS). Statistically significant odds ratios are shown in darker tones. Countries and economies are ranked in descending order of the increased likelihood of having repeated a grade amongst disadvantaged students, after accounting for reading performance.
Source: Adapted from OECD (2022[15]), Review of Inclusive Education in Portugal, Figure 1.20., https://doi.org/10.1787/a9c95902-en.

Early interventions to support students at risk of academic failure

Research points to the importance of targeted instructional strategies and specific interventions to support students at risk of academic failure (OECD, 2022[128]). For instance, Early Warning Systems can provide actionable indicators and predictors of students who may be experiencing challenges to help inform targeted intervention strategies (OECD, 2021[145]).

The "Tackling early school leaving project" in Latvia is an example of a programme that focuses on intervening early to support students who may be at risk of failing. Teachers create an individual support plan for each student at the beginning of the school year based on an assessment of various risk factors, which is then used to guide tailored follow-up support measures through the year, such as consultations with specialists (OECD, 2021[194]). Interventions to reduce grade repetition were also implemented by the Flemish Community of Belgium following the period of school closures driven by the COVID-19 pandemic. Targeted remedial courses were offered to small groups of students in order to enable them to catch-up on learning and become more resilient (European Commission/EACEA/Eurydice, 2021[195]; OECD, 2022[128]).

Non-instructional support and services

Supporting all learners to achieve their educational potential and in fostering a sense of belonging depends not only on teachers and school leaders, but also on the availability of non-instructional support and services at the school (Cerna et al., 2019[146]). School counsellors and psychologists can, for instance, play an important role in supporting and promoting the well-being of students from diverse backgrounds. In addition, social and emotional learning programmes and trauma-informed teaching strategies can help address the needs of students who may have experienced trauma or who may otherwise need particular

social and emotional support (Cerna, 2019[35]; McBrien, 2022[196]; Sullivan and Simonson, 2016[197]). Other therapeutic services, such as physiotherapy and mental health support, may also be beneficial for certain students, in particular those with physical impairments.

In addition, career and educational guidance can help ensure all students have equal opportunities to succeed and contribute to improved educational and employment outcomes (Cerna et al., 2021[40]). Tutoring and/or mentoring programmes can further serve as a means of supporting diverse or marginalised students to achieve their educational potential and feel a sense of belonging in schools.

Supporting students' well-being

Counselling and therapeutic services to support students' well-being

In-school counselling and therapeutic services are offered in a number of education systems to support the psychological and social well-being of students. Psychologists working in schools have been recognised as being in a unique position to support students' mental health needs as a result of their training in both psychology and education (Reupert et al., 2022[198]; Splett et al., 2013[199]). The role of school psychologists can extend beyond conducting psychoeducational assessments and providing counselling services, and include the provision of a broader range academic, behavioural and social-emotional support services, the development of school-wide strategies to facilitate supportive learning environments, and programme evaluation (McNamara, Walcott and Hyson, 2019[200]; Reupert et al., 2022[198]). In Australia, for instance, school psychologists deliver a range of services to support the well-being of students, staff and parents, which include individual and group counselling, identification of students at risk of mental illness or suicidal behaviour, assessments, parental support and "school-wide approaches to enhance staff and student well-being" (Reupert et al., 2022[198]). Similarly, in Germany, the role of school psychologists may involve case consultation and professional development with teachers, in addition to counselling services. In Canada, psychologists may also be involved in the development and implementation of school-based prevention programmes, in addition to conducting psychoeducational assessments and consult with school staff regarding interventions for individual students with particular needs (ibid.).

Box 5.7. School-based counselling and mental health support in the context of COVID-19

The COVID-19 crisis highlighted the crucial role schools can play in supporting student well-being and in serving as a safe space where students can access psychological support services (OECD, 2020[201]). In addition to resulting in disruptions to student learning, the pandemic and its consequences also had significant impacts on students' mental health (Elharake et al., 2022[202]; Hawrilenko et al., 2021[203]; OECD, 2020[148]; Reupert et al., 2022[198]). For instance, a systematic evidence review (covering more than 130,000 children and adolescents across 22 countries) conducted by UNICEF's Office of Research - Innocenti on the immediate effects of COVID-19 on child and adolescent mental health found that higher levels of depression, fear, anxiety, anger, irritability, negativity, conduct disorder and alcohol and substance abuse were commonly reported in children and adolescents in 2020, compared with pre-pandemic rates (Unicef Office of Research - Innocenti, 2021[204]).

To respond to students' mental health needs, a variety of school-based initiatives were implemented in education systems across the OECD, both during the period of school closures and following re-openings. In several education systems (such as Australia, Canada, Germany and the United States), school psychologists provided virtual counselling and consultation services, as well as developing and posting videos and written material on socio-emotional and behavioural issues to support parents and students (Reupert et al., 2022[198]). Resources regarding mental health were also developed and disseminated among students, parents and teachers in several education systems. In

Canada, to support students' mental health during school closures and re-openings, material aimed at promoting positive mental health was produced and translated into the country's 14 most commonly spoken languages, including Indigenous languages and American sign language (OECD, 2020[201]). The French Ministry of Education created a dedicated page with resources and advice for teachers to best support students during school re-openings (OECD, 2020[201]). In England (the United Kingdom), well-being guides were downloaded by hundreds of schools to help communicate with students and discuss their feelings (Shoffman, 2020[205]).

Sources: Elharake et al. (2022[202]), Mental Health Impact of COVID-19 among Children and College Students: A Systematic Review, https://doi.org/10.1007/s10578-021-01297-1; Hawrilenko et al. (2021[203]), The Association Between School Closures and Child Mental Health During COVID-19, https://pubmed.ncbi.nlm.nih.gov/34477850/; OECD (2020[201]), The impact of COVID-19 on student equity and inclusion: supporting vulnerable students during school closures and re-openings, https://www.oecd.org/education/strength-through-diversity/OECD%20COVID-19%20Brief%20Vulnerable%20Students.pdf; (accessed 19 August 2022); Reupert et al. (2022[198]), The practices of psychologists working in schools during COVID-19: A multi-country investigation, https://pubmed.ncbi.nlm.nih.gov/34383527/ ; UNICEF Office of Research – Innocenti (2021[204]), , https://www.unicef-irc.org/publications/pdf/Life-in-Lockdown.pdf (accessed 23 August 2021).

In-school counselling services can be targeted to address the needs of students from diverse backgrounds or who embody a particular dimension of diversity. For instance, counsellors with specific training in learning disabilities and mental health issues are offered in some education systems to support the learning and inclusion of students with SEN (Goodman-Scott, Bobzien and Milsom, 2018[206]; Brussino, 2020[68]). Counselling support is also provided in several OECD education systems as part of programmes or initiatives to support the socio-emotional well-being of refugee or immigrant students (Cerna, 2019[35]). Counselling support can be particularly important to address mental health needs arising from the trauma these students may have experienced (Brussino, 2020[68]). In Türkiye, for instance, guidance counsellors were appointed to public schools and temporary education centres as part of a series of targeted policy measures to support the integration of refugee students (Cerna, 2019[35]). In Austria, psychologists often form part of the specialist support teams deployed to support schools with high percentages of immigrant students through the Ministry of Education's Mobile Intercultural Teams programme that has been implemented since 2016 (Cerna, 2019[35]; Scholten et al., 2017[207]). The psychologists are qualified to help children who have experienced trauma or difficulty in their lives (Cerna, 2019[35]; Scholten et al., 2017[207]). In Canada, school counsellors have been recognised as playing an instrumental role in the integration of refugee students through, for instance, identifying and addressing mental health needs (such as feelings of depression, dislocation and anger and post-traumatic stress) and ensuring support for language acquisition (Brussino, 2020[68]; Education International, 2017[170]).

In addition to providing targeted support to specific groups of diverse students, school counselling services can be used as a tool in developing more inclusive learning environments generally. For instance, the American School Counsellor Association in the United States has provided guidelines on the role of school counsellors in promoting gender equity as part of creating an emotionally, intellectually and physically safe environment for all students. The guidelines encourage school counsellors to "model inclusive language reflecting identities across the gender spectrum" and to "actively advocate for equitable policies, procedures, practices and attitudes embracing equity in opportunities and access to resources for all students and colleagues" (American School Counselor Assoication, 2020[208]).

Beyond counselling, other non-instructional support services can be key in ensuring that all students are able to thrive while at school. Timely and high-quality medical assessment is, for instance, important to adequately diagnose the needs of some students with SEN and orient them towards the most suitable educational provision. Medical assessment can help ensure that students have access to the therapeutic support and additional services they may need in order to be able to achieve their educational potential and feel a sense of belonging. In Finland, 2014 legislation establishing a right for all pupils to have access to student welfare students has resulted in a health and welfare team being embedded into every school.

Consisting of a school nurse, doctor, social worker and a psychologist, the role of the teams is to identify any social and mental health needs students may have and ensure that they receive appropriate support while at school (Coburn, 2019[209]). In New Zealand, physiotherapists and occupational therapists form part of the Physical Disability Service provided by the Ministry of Education, which provides support for students who have a physical disability that prevents them from learning (Brussino, 2020[210]; New Zealand Ministry of Education, 2022[211]).

Social and emotional learning programmes and trauma sensitive strategies

Some students may have experienced trauma in their lives that may impact on their experiences in the classroom and mean they have particular learning needs. Researchers, have noted, for instance, that teachers and school staff may need to provide refugee students with particular social and emotional support due to the challenges or difficulties they may be facing as a result of their pre-migration or resettlement experiences (Sullivan and Simonson, 2016[197]; McBrien, 2022[39]). Schools can help support the needs of these learners through effective social and emotional learning programmes and trauma-informed or trauma-sensitive teaching strategies (Tanyu et al., 2020[212]). Research has demonstrated that dedicated school-based social and emotional learning programmes can help meet children's developmental needs and can lead to improved outcomes for students, both in terms of behavioural issues and mental well-being (Tanyu et al., 2020[212]). For instance, a study of 33 universal and 15-targeted social and emotional learning interventions implemented in Denmark, Portugal, South Africa, Türkiye and the United States, showed positive effects for pre-school children, particularly those who had been identified as in need of early intervention (Murano, Sawyer and Lipnevich, 2020[213]; Tanyu et al., 2020[212]; McBrien, 2022[39]).

Developed by the global not-for-profit organisation Committee for Children, the Second Step programme is designed to provide an holistic approach to social and emotional learning across different education levels (from ECEC to upper secondary) and have been implemented a number of countries, including Denmark, Estonia, Finland, Germany, Japan, Lithuania, Norway, Sweden and the United States (McBrien, 2022[39]; Second Step, 2022[214]). The programme teaches skills for conflict resolution, working with others, decision-making and developing healthy relationships (Second Step, n.d.[215]). Second Step also supports schools in developing and implementing trauma-informed practices to help create trauma-sensitive schools in which students feel safe to learn (Second Step, 2016[216]). An evaluation of a German adaptation of the programme found that students who had participated showed significantly reduced anxiety and depression and improved social behaviour (Schick and Cierpka, 2005[217]).

Dedicated social and emotional learning programmes can play an important role in supporting the needs of refugee students who have experienced trauma (UNESCO, 2019[218]; Cerna, 2019[35]). School-based interventions with a cognitive behavioural therapy basis, which can deal with both past experiences (for instance, through verbal processing) and current and future challenges (using methods such as self-soothing) have been found to have the potential to have positive therapeutic effects (Cerna, 2019[35]; Sullivan and Simonson, 2016[197]; Tyrer and Fazel, 2014[219]). Creative expression programmes – which aim to develp social and emotional skills through art, music or drama – have also been implemented in several education systems (Cerna, 2019[35]), and have been recognised as having the potential to reduce symptoms of post-traumatic stress disorder, anxiety and depression (UNESCO, 2019[218]). For instance, in Montreal (Canada) a 12-week creative arts workshop programme offered in primary schools to develop immigrant and refugee students' confidence and help address behavioural issues was associated with higher self-esteem and reduced mental health symptoms (UNESCO, 2019[218]). In Türkiye, the Trauma-Informed Schools project is a social and emotional learning programme that has been implemented in selected primary schools and temporary education centres hosting refugees from Syria. The programme runs eight-week long art therapy workshops that seek to provide children with the skills to deal with trauma and adjust to their new environment. Activity groups are tailored to respond to the specific symptoms displayed by students, with a one-day general session also being held for the whole school

(UNESCO, 2019[218]). The government-financed NGO Pharos programme in the Netherlands is a further example of an initiative to support the socio-emotional well-being of refugee students (Cerna, 2019[35]). The programme has been implemented in secondary schools since the 1990s and seeks to address the difficulties refugee students face, strengthen peer support systems, foster teacher support and strengthen coping ability and resilience among refugee children (Centre for Addiction and Mental Health, 2012[220]; Cerna, 2019[35]). The programme includes a series of 21 lessons emphasising non-verbal techniques such as drawing and drama. The lessons aim to improve the well-being of youth seeking refuge or asylum and to prevent them from developing psychosocial problems by building bridges between the past, the present and the future. Classmates become companions and learn how to support each other (Centre for Addiction and Mental Health, 2012[220]; Cerna, 2019[35]).

OECD research with Indigenous communities indicates that culturally responsive trauma-informed approaches developed in collaboration with students, families and communities can help promote the well-being of Indigenous students. In Alaska (the United States) the Tranforming Schools Framework was developed to help schools improve student well-being and academic outcomes by implementing trauma-engaged policies and practices. The Framework was designed by community members, school leaders and school staff in accoredance with factors that are important in the education of Indigenous students, including the need for culturally-responsive programmes and policies (Murano, Sawyer and Lipnevich, 2020[213]; Tanyu et al., 2020[212]).

Career and educational guidance

Career and educational guidance can help ensure that all students receive equal opportunities to achieve throughout education and beyond (Cerna et al., 2019[146]). Effectively designed, career and educational guidance services can serve as a means of recognising the unique characteristics and backgrounds of young people and, in particular, patterns of disadvantage, which can lead to a greater understanding of students' different educational needs and in turn contribute to improving educational, social and economic outcomes (Jeon, 2019[221]; Musset and Mytna Kurekova, 2018[222]). Guidance is particularly important to support students' transitions across different education levels (such as between primary and lower secondary level, upper secondary and tertiary level) and between education and the labour market, particularly for diverse students who might otherwise be left behind (Cerna et al., 2019[146]).

Career and educational guidance can, for instance, be used as a tool to improve the secondary school completion, employment and income rates of students with SEN, who, research has shown, may face additional challenges in transitioning from one educational level to another and/or from education to the labour market (Brussino, 2020[68]; Jenkin, 2021[223]).[8] In Ireland, the National Council for Special Education has published guidelines to assist schools in supporting students with SEN to make successful transitions between different education levels and from school to post-school options. The guidelines set out a list of "inclusive practices" to support students during periods of transition and provide a series of principles for effective post-school transition planning (National Council for Special Education, 2016[224]). Similarly, in England (United Kingdom), the Careers and Enterprise Company has published practical guidance for schools and colleges on how careers programmes can best support students with SEN, including an evidence-based guide to assist schools and colleges in developing and implementing transition programmes (Hanson, Codina and Neary, 2017[225]). The Careers and Enterprise Company also has a Community of Practice that aims to support schools and colleges working with students with SEN through the sharing of good practice and the development of resources and a Company Enterprise Adviser Network that connects schools and colleges with employers to provide students with work experience opportunities (Department for Education, 2021[226]).

Career and educational guidance may also play a critical role in supporting the social inclusion of refugees and immigrants (Fejes, Chamberland and Sultana, 2021[227]). In Norway, for instance, career guidance has been officially recognised as a tool that should be used in achieving greater integration (ibid). In line with

this, a statutory right to career guidance has been established both for all pupils enrolled in lower and upper secondary compulsory education and for all newly arrived refugees (Euro Guidance, 2022[228]). Career guidance can be particularly important in light of the fact that that immigrant students and their families may have limited knowledge regarding the career and educational opportunities available in their host country and how best to prepare for them (Jeon, 2019[221]), and considering that PISA 2018 showed that immigrant students were less likely to hold ambitious but realistic career expectations compared to native students, in most countries across the OECD (Cerna, Brussino and Mezzanotte, 2021[229]).[9] Career guidance can also help to change perceptions immigrant or refugee students and their families may have regarding upper-secondary Vocational Education and Training (Jeon, 2019[221]). In addition to more general career counselling programmes within schools, some OECD education systems provide guidance tailored to the particular needs of students from refugee or immigrant backgrounds. In the United States, for instance, career and educational counselling is one of the services provided as part of the Unaccompanied Refugee Minors Programme developed and implemented by the Office of Refugee Resettlement within the United States Department of Health and Human Services (United States Department of Health and Human Services, 2021[230]; Cerna, 2019[35]).

Career guidance has further been identified as a measure to help promote improved educational and employment outcomes for Roma students (Alexiadou, 2019[231]; Rutigliano, 2020[103]). Researchers have also emphasised the importance of providing targeted support to gifted students in the transition beyond compulsory education through tailored career counselling (Greene, 2005[232]; Jung, 2017[233]; Rutigliano and Quarshie, 2021[38]).

Tutoring and mentoring

Tutoring and/or mentoring programmes have been implemented in several OECD education systems as a means of supporting students, particularly diverse students or students from disadvantaged backgrounds, to achieve their educational potential and feel a sense of belonging. Strategies include teacher-student mentoring, peer-to-peer tutoring and mentoring, student mentoring or tutoring from a higher education student or professional, and student-expert mentoring. Research has shown that providing targeted academic support and mentoring to students who are most at risk of dropping out of school can be effective in reducing dropout rates and improving learning outcomes (Borgonovi, Ferrara and Maghnouj, 2018[234]; Wilson et al., 2011[235]). As discussed in Chapter 4, peer-to-peer mentoring programmes can also serve as a strategy for encouraging the development of positive relationships among students, which can in turn improve student well-being.

Peer-to-peer tutoring is a common learning support strategy in OECD education systems, with findings from PISA 2018 showing that almost half of all students reported attending a school that provides peer-to-peer tutoring as a form of study help, on average across OECD countries (OECD, 2020[26]). Peer-to-peer tutoring is a strategy where students work in pairs or small groups to provide each other with learning support (Education Endowment Foundation, 2021[236]). There are a variety of peer-to-peer tutoring models, including: (i) cross-age peer tutoring, where an older student teaches or reviews skills or content with a younger student; (ii) peer assisted learning strategies, where students who need additional instruction or support are paired with a peer who can assist; (iii) same-age peer tutoring, where peers who are within one or two years of age of each other are paired to review key concepts; and (iv) reciprocal peer tutoring, where two or more students alternate between acting as the tutor and the tutee during the session (Regional Directorate of Primary and Secondary Education of Thessaly, 2017[237]). Peer learning programmes have been shown to positively affect student learning, with a number studies showing benefits for both tutors and tutees, across a wide range of age groups (Education Endowment Foundation, 2021[236]; Ibeth et al., 2018[238]; Moliner and Alegre, 2020[239]). In PISA 2018, for instance, students in schools offering peer-to-peer tutoring scored 14 points higher in reading than students without access to peer-to-peer tutoring (four points higher after accounting for socio-economic variables), and peer-to-peer tutoring was associated with better reading performance in 15 countries and economies, after accounting for students'

and schools' socio-economic profile (OECD, 2020[26]). While research shows that peer-to-peer tutoring can positively impact on the academic outcomes of all students, there is evidence to indicate that it may particularly benefit students showing low academic achievement and those with special education needs (Education Endowment Foundation, 2021[236]; Stenhoff and Lignugaris/Kraft, 2007[240]). Peer-to-peer tutoring can also result in improved self-esteem, motivation and peer relationships (Education Endowment Foundation, 2021[236]; Moliner and Alegre, 2020[239]; Regional Directorate of Primary and Secondary Education of Thessaly, 2017[237]). A study undertaken in Spain found that it can mitigate feelings of anxiety students may have regarding mathematics (Moliner and Alegre, 2020[239]).

Mentoring programmes can also be an effective strategy to promote the inclusion and learning outcomes of diverse learners and learners from disadvantaged backgrounds. There are, for instance, several examples of mentoring programmes that explicitly focus on supporting the educational engagement and participation of boys, particularly those from low socio-economic backgrounds (Borgonovi, Ferrara and Maghnouj, 2018[234]). In the United States, for example, Becoming a Man is a mentoring programme targeting boys and young men from low socio-economic backgrounds in neighbourhoods with large shares of minority populations. Introduced in a number of public schools in Chicago in 2009, the programme seeks to reduce dropout rates and behaviour patterns that can lead to problems in school-related activities by teaching boys self-regulation, problem-solving and impulse control through a series of weekly group meetings that take place during the school day. Evaluations of the programme revealed positive impacts on participants' learning outcomes and retention rates in school (Borgonovi, Ferrara and Maghnouj, 2018[234]; Heller et al., 2016[241]). The positive evaluations of the programme were key in the adoption of similar initiatives in Chicago and elsewhere in the United States (Borgonovi, Ferrara and Maghnouj, 2018[234]).

Mentoring programmes have been recognised as tending to improve gifted students' motivation, self-worth and education (Ball, 2018[242]; Rutigliano and Quarshie, 2021[38]). Mentoring is, for example, explicitly recognised by the New Zealand Ministry of Education as a key strategy in supporting the learning needs of gifted students, particularly Indigenous gifted students (New Zealand Ministry of Education, 2012[243]). Mentoring strategies for gifted students include teacher-student mentoring, mentoring with an older gifted student and student-expert mentoring (Rutigliano and Quarshie, 2021[38]). An example of this third strategy from Germany is CyberMentor, an online mentoring programme for female students between the ages of 11 and 18 who have been identified as talented in STEM subjects. Participating students are individually mentored by a woman who is working on a graduate degree in a STEM field, undertaking postdoctoral research or is currently working in the STEM field. Over the course of a year, mentee students and mentors meet weekly via a members-only online platform, which also enables networking with the other programme participants (Stoeger et al., 2019[244]).

Engagement with parents or guardians and communities

Promoting an inclusive school climate that supports all learners in achieving their educational potential involves all members of the school community, including school staff, students, parents and family members, agencies that engage with the school, and members of the broader community (Cerna et al., 2019[146]). Research has shown that the involvement of parents or guardians and communities in the learning of their children plays a pivotal role in students' educational achievement and broader well-being (OECD, 2019[245]; Rutigliano and Quarshie, 2021[38]). Engaging local communities, parents or guardians and families is therefore important for schools who seek to create inclusive and equitable school environments (Cerna et al., 2021[40]). The participation and involvement of parents or guardians and the broader community can be promoted through school governance structures and initiatives and mechanisms that relate to fostering a positive school climate. This is key in ensuring horizontal accountability in assessing the extent to which schools are equitable and inclusive, greater responsiveness to the diverse needs and priorities of communities served by the school, and the development of joint

strategies to create a school environment that supports all learners in achieving their educational potential and fosters a sense of belonging (Cerna et al., 2021[40]).

Fostering engagement with parents

The involvement of parents and guardians in the school community and their children's educational pathway can have positive impacts on the school climate and help advance inclusion within schools (Cerna et al., 2019[146]). There is evidence to indicate that engaging with families can bring new ideas and encourage schools to reflect on how to more effectively welcome diverse identities into their communities and develop more inclusive ways of working (Guthrie et al., 2019[9]; Rojas Fabris, 2016[246]; Calderón-Almendros et al., 2020[247]; OECD, 2022[15]). Research has further shown that parental and family engagement can have a positive impact on students' educational outcomes (OECD, 2019[245]), as well as their overall well-being more broadly (Koshy, Smith and Brown, 2016[248]; Rutigliano and Quarshie, 2021[38]). Parental or guardian involvement can be particularly important for disadvantaged or marginalised students or students who are otherwise at risk of not achieving their educational potential (OECD, 2019[245]). Parents or guardians are essential in identifying and conveying the needs of their children and in collaborating with the school to address such needs, which can be key in supporting diverse students' learning and well-being (Cerna et al., 2021[40]). For instance, parents or guardians have a central role in the early identification of a child's giftedness (Rutigliano and Quarshie, 2021[38]; Sękowski and Łubianka, 2013[249]) and, in turn, supporting programmes or interventions to address their specific educational needs (Bicknell, 2014[250]; Koshy, Smith and Brown, 2016[248]; Rutigliano and Quarshie, 2021[38]). Parental engagement in educational decisions regarding their children's SEN can play an important role in influencing learning outcomes and has been shown to lead to improvements in students' academic performance, school participation and behaviour (Barlow and Humphrey, 2012[251]; Brussino, 2020[68]). In New Zealand, for instance, an external evaluation carried out in more than two hundred schools on the impact of parental and broader familial engagement for students with SEN found a number of benefits from consolidating partnerships between schools and parents and/or families, including both improved academic and social outcomes for students with SEN and an increased sense of appreciation of their talents and skills (Mutch and Collins, 2012[252]; New Zealand Education Review Office, 2008[253]; Brussino, 2020[68]).

Legislation concerning the inclusion of parents generally in school activities is prevalent among OECD education systems (OECD, 2019[245]). Data from PISA 2015 showed that, across OECD countries, approximately 70% of 15-year-old students attended schools whose principals reported that there was national, state or district legislation in place on including parents in school activities. In all participating OECD countries apart from Japan and the Slovak Republic, the majority of students attended schools operating under legal rules concerning parental engagement (OECD, 2016[3]; OECD, 2019[245]).

In practice, schools can play an important role in helping parents and guardians support their child's learning and connect with other social services that may be relevant to their progress and development (Guthrie et al., 2019[9]). However, a number of factors can operate as barriers to effectively engaging with students' families. Navigating the educational landscape in a new country can, for instance, be challenging for immigrant parents and guardians, and they may not be aware of how to engage in the school community and/or face language barriers that prevent them from doing so (Guthrie et al., 2019[9]). Some parents may also have limited education, lack the time and resources to engage in their child's education and provide a rich home learning environment (Guthrie et al., 2019[9]; OECD, 2010[254]), or face other challenges such as inflexible work hours that prevent them from being able to meet with teachers or school leaders at the allocated times (Guthrie et al., 2019[9]). In addition, the expectations and experiences of some parents and guardians also may not align with those of the education system in which they live (ibid.). For instance, the pedagogy and the vision of childhood and adulthood encountered in various Roma communities combined with the expectations Roma parents have regarding school may be in sharp contrast with the mainstream

Western education system, which can operate as a barrier to effective dialogue with the school (Rutigliano, 2020[103]).

One way in which education systems can support schools in this respect is by providing schools with guidance on how to involve parents and guardians from all backgrounds in the school community (Guthrie et al., 2019[9]; Santiago et al., 2017[11]). Recommendations on steps schools can take to engage with refugee parents and families are, for example, included as part of guidance published by the Department of Education in New South Wales, Australia, on how schools can support students from refugee backgrounds (Cerna, 2019[35]; New South Wales Department of Education, 2016[255]). In Austria, the multi-dimensional talent support tool *mBET*, which supports teachers in providing personalised support to gifted students, includes guidelines for support-orientated counselling talks between teachers, parents and students to foster a "personalised form of gifted education" and ensure that parents' perspectives are incorporated into educational decision-making (Rutigliano and Quarshie, 2021[38]; Stahl, 2014[256]).

Providing language support to parents and guardians who do not speak the first language of the education system can be an effective way to promote the engagement of immigrant families in the school community (Cerna, 2019[35]; Guthrie et al., 2019[9]; Santiago et al., 2017[11]). In Vienna, Austria, and cities across Germany, the programme Mommy learns German – Daddy too (*Mama lernt Deutsch – Papa auch*) provides linguistic support to the parents and guardians of immigrant students. The programme allows immigrant parents to meet and share their migration experience through the German language (Guthrie et al., 2019[9]; Cerna et al., 2019[146]). Intensive English-language courses are offered in Queensland, Australia, as part of the government's commitment to improve the engagement of immigrant and refugee communities in education (Cerna, 2019[35]). In addition to language support, community groups or support networks can also help in disseminating information to immigrant or refugee parents (ibid.).

Dedicated liaison workers have been used as a tool in several education systems to strengthen communication between schools and parents or guardians. In Ireland, the Home School Community Liaison scheme, which was introduced in 1990 and targets schools in disadvantaged areas, provides support for families to become more engaged in their child's education, which includes visits by scheme coordinators (Guthrie et al., 2019[9]; Weir et al., 2018[257]). The responsibilities of the role of the coordinators are detailed in an information booklet published by the Irish Department of Education and Skills and include the following (Tusla Education Support Service; Department of Education and Skills, 2021[258]):

- Encouraging, supporting and facilitating partnership between parents and teachers in the education of their children;
- Working with school staff to develop an understanding of educational disadvantage and promote innovate approaches to address it;
- Actively developing and promoting parental involvement as an integral part of the school planning process;
- Working with parents to prepare and support them as a resource to their own children and also to the wider school community; and
- Visiting the homes of students in order to develop bonds of trust between parents and school, encourage parents to be involved in their child's education, and to provide information about the school and services available in the community.

As of 2017, 259 primary schools and 181 post-primary schools were included in the programme, and evaluations suggest that it has been successful in increasing parental involvement among targeted disadvantaged parents (Guthrie et al., 2019[9]; Weir et al., 2018[257]). Some coordinators also reported that the programme has had a positive impact on immigrant families (Guthrie et al., 2019[9]; Weir et al., 2018[257]).

Home visits are also a strategy that has been implemented by an early childhood education and care centre located at the heart of a low socio-economic and predominantly Indigenous community in

North Winnipeg in Manitoba (Canada). Engagement with children's families is an important part of the programme, both to support parents in enhancing their children's development and learning and to address any barriers or issues that families may be facing (OECD, 2017[47]).

Use of mediators

The cultural mediator is a well-known concept and widely used strategy among a variety of institutions and organisations in various countries across the OECD (OECD, 2022[15]). The Department of Education of the state of Colorado (United States), for example, makes use of cultural mediators to facilitate successful communication and promote positive relationships with parents and families, including within its Head Start programmes, which seek to promote the school readiness of infants, toddlers and preschool-aged children from low socio-economic status families (ibid.). In the European Union, the use of cultural mediators with a Roma background is considered to be one of the most effective practices for bridging potential gaps and fostering connections between Roma communities and public institutions (OECD, 2022[15]; Rutigliano, 2020[103]). Cultural mediators with a Roma background are employed in the education systems of a number of countries in Europe to build trust and sustained relationships between schools and Roma families and to support the learning of Roma students. They have proven successful in improving the well-being and academic performance of Roma students as well as promoting the inclusion of the community as a whole (OECD, 2022[15]; Rutigliano, 2020[103]). In the Santo António school cluster in the Barreiro region of Portugal, for example, the employment of a cultural mediator from a local Roma community has been instrumental in engaging with Roma families and communities and improving outcomes for Roma students. Among other achievements, rates of absenteeism have decreased for Roma students, increased numbers of female Roma students are staying at school until the age of 18, and projects to specifically improve the inclusion of Roma girls and women have been implemented (OECD, 2022[15]).

Similarly, some schools in provinces of Canada employ dedicated Indigenous support staff who, in addition to supporting teachers regarding teaching strategies and practices to foster the inclusion of Indigenous students, serve as a connecting point with Indigenous parents (OECD, 2017[10]). In addition, language facilitators are employed by some schools in Chile to both provide mother tongue language support within the classroom and to facilitate relationships between schools and immigrant parents or guardians who may not speak Spanish. For instance, some schools in the Santiago Metropolitan Region employ language facilitators who speak Creole (Kreyòl) due to the growing number of immigrant students and families from Haiti (Guthrie et al., 2019[9]).

Mediators or language facilitators can also play a vital role in liaising and building relationships with the parents or guardians of newly-arrived immigrant or refugee students. In Austria, for example, one of the functions of the Mobile Intercultural Teams established by the Ministry of Education is to work with parents or guardians to support the successful integration of immigrant and refugee students into the school community. Members of these teams often serve as a language bridge between students, parents and the school (Eurydice, 2018[259]; Felder-Puig, Maier and Teutsch, 2016[260]; Cerna, 2019[35]). In a study evaluating the programme's effectiveness, many schools (over 30%) reported improvements in overcoming communication difficulties stemming from language and cultural barriers, informing migrant families about school operations, and co-operation with parents (Felder-Puig, Maier and Teutsch, 2016[260]; Guthrie et al., 2019[9]).

Engaging with the broader community

In addition, local communities can play an important role in educating young people and contributing to their overall well-being, including through supporting parents in creating safe and positive home environments (Cerna et al., 2021[40]; Smith et al., 2017[261]). Alongside school-family partnerships, community-centred approaches have been recognised as effective tools in helping all students achieve their educational potential (Matthews and Menna, 2003[262]; OECD, 2019[245]; Rutigliano and Quarshie,

2021[38]). In education systems across the OECD, there are various examples of schools, parents and community organisations collaborating closely to develop or implement community-based programmes to support the inclusion of specific groups of diverse students (OECD, 2022[15]).

Collaboration with the broader community can, for instance, play a key role in fostering the inclusion of refugee or immigrant students and students from ethnic minority backgrounds. As part of the Settlement Workers in Schools Program in Canada, for instance, settlement workers from across community agencies work across and facilitate collaboration between schools and various community organisations and actors to support the successful integration of newcomer students into schools (Koehler, Palaiologou and Brussino, 2022[263]). In Portugal, the Manuel Ferreira Patricio school cluster in the Évora area collaborates with several local associations on a variety of initiatives to promote the inclusion of students with an immigrant background and from Roma communities. Similarly, the Santo António school cluster in Barreiro has implemented a number of activities to strengthen engagement with the broader community, such as regular culinary events where families from different nationalities come together to share food from their different home countries (OECD, 2022[15]).

The engagement and involvement of Indigenous communities in educational decision-making and school activities can also help meet the needs and support the inclusion of Indigenous students (Cerna et al., 2021[40]). Community (and parental) engagement has, for instance, been identified as one of the key elements to improve Indigenous education outcomes in the Northern Territory of Australia (Smith et al., 2017[264]). Engaging and involving Indigenous community members is also a central feature of programmes and initiatives intended to improve the well-being of Indigenous students in Canada (OECD, 2017[47]). One example of this is the Trauma-Informed School project in Ontario, which was a multi-phase and community-driven project that sought to develop trauma informed approaches and support mechanisms for Indigenous students as part of improving their educational outcomes (Tanyu et al., 2020[212]). Engagement with families and community members was the central component of the first phase of the project, and community support and collaboration were identified as a key theme in how schools can implement trauma-informed approaches that better support Indigenous students (ibid.).

Pointers for policy development

The final section of this chapter provides a series of policy pointers that education systems can consider to promote equity and inclusion through school-level interventions. These have been developed on the basis of the analysis of different policies and practices developed in this chapter, which draws on available evidence and research literature along with experiences discussed in country-specific work of the Project and other OECD work.

Ensure that teachers adopt a variety of teaching formats and delivery methods to address the learning needs of all students

The practices that teachers adopt in the classroom have an important role in the learning of their students. Different students can have a diversity of learning needs and styles and benefit from different approaches and teaching strategies - which teachers should leverage to foster their learning potential. Moreover, supporting students with a variety of teaching methods can help keep them engaged in education, make them feel valued and improve the overall school climate.

Supporting all learners and fostering more equitable and inclusive learning settings entails a reflection on the learning frameworks adopted by teachers and the impact these can have on students. Inclusive models can improve the equity and inclusivity of schools and classrooms, and should be used by teaching and school staff in the design and delivery of pedagogies, curricula and assessments. Universal Design for Learning and intercultural education are, for instance, two frameworks that can be adopted by teachers to

support all learners in achieving their educational potential. These frameworks are meant to design content and differentiate delivery so as to eliminate or reduce possible learning barriers for students from the outset. Intercultural education also aims to ensure that all students' cultural differences are valued, and not simply acknowledged, in the design and delivery of instruction.

Different pedagogies play an important role. Growing evidence shows that culturally responsive teaching practices have a positive impact not only on students' learning but also on their engagement and psychological well-being. Differentiated instruction, in particular, is at the core of inclusive education as it is tailored around the differentiation of approaches to serve various student needs through a blend whole-class, group and individual instruction formats. Indeed, adopting a range of teaching formats – from one-on-one tuition to small group approaches – can help teachers to support the needs of various students. The effective use of digital technologies can serve as a tool to support teachers in adapting to different learning styles and in meeting students' particular needs, as well as helping to promote greater student engagement more broadly through providing scope for a range of different learning activities.

Provide appropriate support measures and tools to accommodate diverse student needs

The implementation of the curriculum at the school level plays a key role in addressing the needs of diverse students. It is important that education systems provide for sufficient flexibility regarding curriculum delivery so that students can receive appropriate support measures and, if necessary, different tools can be used to support their learning. Education systems should provide for and facilitate schools' use of tools such as Individual Education Plans (IEPs), which are tailored programmes designed on the basis of the individual student's difficulties and needs. While most OECD countries provide these to students with SEN, only a small number leverages them to support other diverse student groups, such as newcomer students. Individual Education Plans enable schools to provide adaptations of the curriculum to address students' specific needs, generally through accommodations and modifications. These measures should be leveraged to allow all students to access learning and fulfil their potential. Accommodations can help students access the same curriculum of other students, through adjustments that can be instructions (e.g., providing additional time for a task) or environmental (e.g., changes to the environment to minimise the risk of distraction). Modifications are changes to assignments or the curriculum that schools and teachers can design to make it easier for students to stay on track and can involve the student learning different material, getting graded or assessed under different standards than other students, or being excused from particular project. These tools should be adopted by education systems and granted to students that require support to be able to access the curriculum and thrive in education. They can also be adapted to the needs of different groups of students, such as students with SEN, students with an immigrant background and gifted students, among others. These measures can be complemented when appropriate with the provision of relevant digital and assistive technology. Finally, the tools can aid students in overcoming learning barriers, driven for instance by learning disabilities, physical impairments or language skills, while also supporting their wellbeing. Appropriate digital and assistive technology support tools to support students' learning can be assessed as part of the design of students' IEPs.

Ensure student assessments are designed and implemented equitably and inclusively

The way in which student assessments are designed, implemented and used can have a strong impact on student engagement, motivation and learning outcomes. Research indicates that some assessment approaches can contribute to alienating students (and teachers) from the education system and exacerbate inequity in education. Conversely, assessment interventions that place students at the centre of the process and are well aligned with learning goals can raise achievement and reduce disparities.

Assessments should allow all students to show what they have learned and understood, without being disadvantaged by individual characteristics that are irrelevant to what is being assessed. It is therefore crucial that they are designed in a way that accounts for and mitigates the risk of bias for or against certain

groups. Guidelines for equitable assessment design should be developed at the system level that set out how to avoid bias in aspects such as content validity, item selection and method choice.

Beyond those that may occur in assessment design, risks of conscious or unconscious bias can also arise in teacher-based assessment processes as a result of teachers' perceptions of certain students. It is therefore important that teachers are equipped (through ITE and continuous professional learning) with the knowledge and competences to recognise and address any biases they may hold, understand how students' backgrounds may affect the way in which they communicate and participate in the classroom, and critically examine the tone and framing of assessment questions in light of this.

Ensuring equity and inclusion in student assessment processes also entails offering students a variety of ways to demonstrate their knowledge by employing multiple assessment forms and techniques. High-stakes decisions about students' learning trajectories should not be based solely on the results of a single test, but should draw on data obtained through a range of assessment tasks of different response formats and styles. This broader approach offers students other opportunities to demonstrate their performance if they are disadvantaged by any one particular assessment in the programme, and can thus help to promote equity in education.

Assessment frameworks should also be sufficiently flexible to allow for adaptations to respond to the particular needs diverse students may have. Depending on the student, this may entail providing extra time or removing time requirements entirely, reducing the linguistic complexity of written tests, allowing students to demonstrate their knowledge orally with the aid of an interpreter or language assistant, or incorporating assistive technologies.

Leverage the provision of non-instructional services to foster students' well-being

Supporting the well-being of learners extends beyond classroom learning and may require a variety of non-instructional services or interventions. As was highlighted during the COVID-19 pandemic, schools can play a crucial role in providing access to psychological services (such as counselling or psychotherapy), particularly for students who may otherwise face barriers in obtaining the support they need in this regard. School-based counsellors have been recognised as being uniquely placed to promote students' mental health and psychosocial well-being due to their training in both education and psychology. Depending on the student profile of the particular school, school-based counsellors may require specialist knowledge and training in particular areas (such as SEN or mental health needs that may arise from traumatic migration experiences), or require guidance and additional support from external expert teams.

Where resource constraints do not allow for all schools to have a dedicated counsellor or psychologist on-side, it will be important that there are frameworks or mechanisms in place that facilitate collaboration between schools and local community service providers. This is necessary to ensure that schools can refer students in need of support beyond that which can be provided by school staff to the relevant professionals.

Schools can also help support the well-being of diverse learners through social and emotional learning programmes and trauma-informed teaching strategies. Social and emotional learning is increasingly being recognised as an important element of students' education that can facilitate academic learning, lead to improved behavioural and mental health outcomes, and help students feel a sense of belonging at school and in their broader communities. School-based interventions with a cognitive behavioural therapy basis and creative expression programmes – which seek to develop social and emotional skills through art, music or drama – have been found to have positive therapeutic effects, including reduced symptoms of post-traumatic stress disorder, anxiety and depression. To effectively promote social and emotional learning, teachers need to be equipped (through high-quality continuous professional learning) with the knowledge and competences to recognise and respond to students' diverse psychosocial needs. In addition, teachers require both the training and time to develop their own social and emotional skills and to reflect on how their thoughts, emotions and relationships may affect their teaching. In some instances,

social and emotional learning programmes may be better delivered by external expert teams rather than school staff, which may require financial resources.

Career and educational guidance represent a further important non-instructional support intervention to help ensure that all students receive equal opportunities to achieve throughout education and beyond. Career and educational guidance is especially important to support students' transitions across different education levels (such as between primary and lower secondary level, upper secondary and tertiary level) and between education and the labour market, particularly for diverse students who might otherwise be left behind. Guidance at the system level can assist schools in effectively supporting diverse students who may face additional challenges in transitioning from one education level to another and/or from education into the labour market.

Implement strategies to engage parents and communities

Engaging or involving parents, guardians and members of the broader community is key to creating a positive school climate and can play a pivotal role in promoting students' educational achievement and broader well-being.

Legislation providing for the inclusion of parents or guardians in school activities is prevalent across OECD education systems. In practice, however, a number of factors can operate as barriers to schools' ability to effectively engage with students' families. Education systems can support schools in this respect by providing guidance on steps schools can take to build connections with and involve parents and guardians in school life. Dedicated liaison workers or cultural mediators can also serve as a key tool to strengthen communication and build trust between schools and families from diverse communities and backgrounds. Targeted programmes and interventions – such as language courses, linguistic support mechanisms and alternative forms of information dissemination for families from different linguistic and/or cultural backgrounds – are a further strategy that can help schools strengthen engagement with the broader community.

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Notes

[1] As described in Chapter 3, vertical equity focuses on providing differential funding for different student groups based on their needs (OECD, 2017[2]).

[2] In Denmark, grade 6 is the final year of primary school.

[3] Measured according to the Child Outcome Rating Scale, which assessed four dimensions of student functioning: (i) personal or symptom distress (measuring individual well-being); (2) interpersonal well-being (measuring the nature of students' relationships with their peers; (3) social role (measuring satisfaction with school); and (4) overall well-being (Masdeu Navarro, 2015[4]).

[4] Students were classified as being "frequently bullied" if they were amongst the 10% of students with the highest values in the index of exposure to bullying across all countries and economies with available data.

[5] While the Strength through Diversity Project uses the acronym LGBTQI+, LGBT has been used here to reflect the focus of the study.

[6] While the Strength through Diversity Project adopts the term special education needs over disability, the latter is here used to reflect the language used by the authors and to underline the cultural dichotomy between ability and disability.

[7] Ableism is defined as discrimination or prejudice against individuals with disabilities (Merriam-Webster, 2022[266])

[8] For instance, research from across the United States has shown that students with disabilities generally tend to have lower high school graduation and tertiary education enrolment rates than their peers (Brussino, 2020[68]; Mader and Butrymowicz, 2017[265]; Johnson et al., 2019[268]). Students with SEN have also been shown to be less likely to obtain academic certifications and qualifications in the context of the European Union, which in turn hinders their access to, and retention in, the labour market (Brussino, 2020[210]; European Commission, 2018[267]).

[9] PISA 2018 defines students holding ambitious but realistic career expectations as those who expect to become managers, professionals or associate professionals and technicians by the age of 30 and who achieved at least PISA proficiency Level 2 in all three core PISA subjects.

6 Monitoring and evaluating equity and inclusion

This chapter analyses the fundamental role that monitoring and evaluation can play in ensuring the continuous improvement and the effectiveness of policies targeted at addressing diversity in education and improving equity and inclusion in education systems. Specifically, this chapter focuses on monitoring equity and inclusion in education, evaluating policies and practices to address diversity, and promoting equity and inclusion at the system, local and school levels. The chapter concludes by proposing policy pointers for approaches to monitoring and evaluation that promote equity and inclusion in education.

Introduction

This chapter discusses the fundamental role that monitoring and evaluation can play in ensuring that an education system is not only introducing policies to improve equity and inclusion, but is also implementing them and achieving its objectives.

Without relevant information on the current state of equity and inclusion and progress towards these, policy makers might judge the system according to the imperfect data they have available. This might misdirect them or, in the case of absence of data, may mean that they are unaware of challenges that need action. Monitoring systems are therefore important to assess progress in improving equity and inclusion in education. They are crucial in providing feedback to inform improvements across the education system, as well as in identifying necessary support measures for schools.

Evaluation is important in determining whether policies are having the intended effects and in informing necessary adjustments. The evaluation process can help policy makers decide, for instance, whether policies are having inadvertent effects and should be discontinued, or whether they warrant further support. In the case of smaller programmes, this can entail their upscaling or institutionalisation. While evaluation can pose challenges, it is particularly important to seek co-operation and consensus across all stakeholder levels in evaluating and subsequently implementing changes that lead to equity and inclusion.

Programmes that support equity and inclusion in education are also designed and implemented at the local and school levels. Hence, the monitoring of progress towards more equitable and inclusive education systems is important at these levels, too. Individual actors need to assess their circumstances and thus receive feedback on their performance in the areas of equity and inclusion. This might also help them identify how to improve their interventions to support equity and inclusion in individual schools. External, as well as internal, school evaluation can be highly informative in improving equity and inclusion in education.

This chapter is organised in five sections. After the introduction, the second section elaborates on monitoring progress in improving equity and inclusion. The third section examines evaluations of policies, programmes and processes to improve equity and inclusion. The fourth section explores supports for schools in improving equity and inclusion practices through evaluation processes. The final section provides pointers for future policy development.

Monitoring progress in improving equity and inclusion in education

Education systems differ in how they monitor progress in improving equity and inclusion in education. The following sections summarise what is monitored, what instruments are used to measure progress and the use of monitoring results.

Operationalisation of equity and inclusion in monitoring systems

Monitoring and evaluation frameworks can be used for accountability and improvement purposes (OECD, 2013[1]). A major accountability objective is to inform the public of the quality of the education system, including the quality of education for diverse groups. Another objective is to provide feedback on reforms in the education system that can be used to improve educational processes and outcomes of all students. In general, six major aims can be distinguished (OECD, 2013[1]):

- Monitoring of student academic and broader well-being outcomes, including the disaggregation by dimensions of diversity, socio-economic background and geographic location;
- Monitoring of student outcomes over time;
- Monitoring of the impacts of a policy;

- Monitoring demographic, administrative and contextual data which can explain the outcomes of the education system;
- Generating feedback and information for stakeholders in the education system; and
- Using the generated information for development and implementation of policies.

These aims can be subsequently tailored for the purposes of monitoring progress in improving equity and inclusion in education. The extent to which these aims are present in a given education system varies. Equity and inclusion are intrinsically linked to the context of each education system – so their monitoring may differ considerably from country to country. Indeed, in academic literature, international definitions or national practices, there is no consensus on either the definitions of equitable and inclusive education systems, or the difference between the two. For the purposes of this report, readers are invited to refer to the explanations provided in Chapter 1.

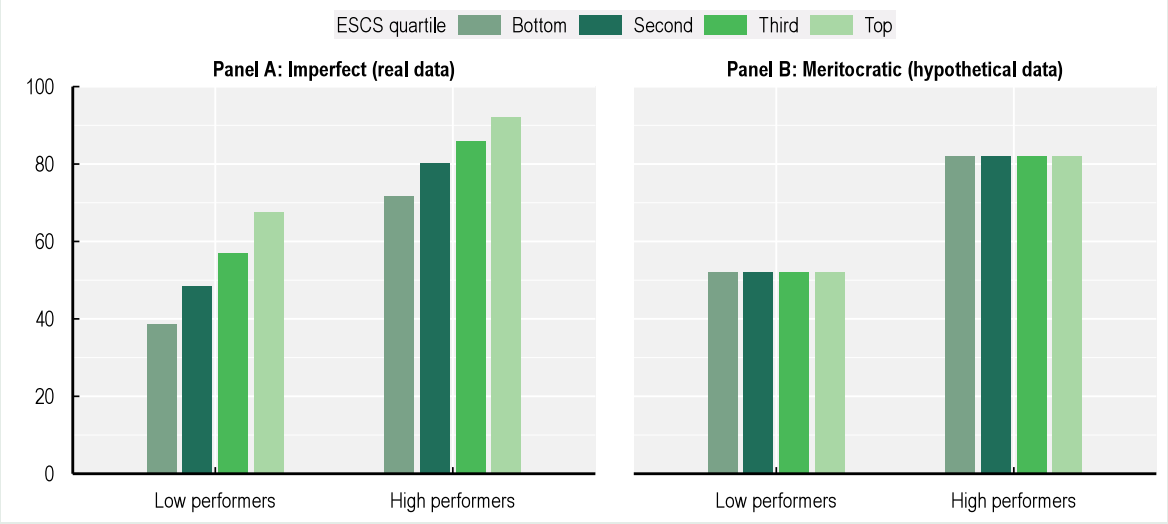
Equitable education systems are those that ensure the achievement of educational potential regardless of personal and social circumstances, including factors such as gender, ethnic origin, Indigenous background, immigrant status, sexual orientation, gender identity, special education needs (SEN) and giftedness (Cerna et al., 2021[2]; OECD, 2017[3]). A closely related term is that of "equal educational opportunities". In a system that offers equal educational opportunities, educational outcomes are the result of actions within the individual student's control and their ability to reach their full potential is not hindered by circumstances beyond their control. Under this notion, educational outcomes should be a result of actions in individuals' control and not of circumstances beyond their control so that they can reach their full potential. One of the roles of monitoring progress in improving equity in education is to look at the disparities in educational outcomes as well as (in)equalities in opportunities. In order to simplify and classify the concept of equity in education, the UNESCO Institute for Statistics (2018[4]) published the *Handbook on Measuring Equity in Education* that outlines a classification of equity in education into five concepts: meritocracy, minimum standards, impartiality, equality condition and redistribution (Box 6.1).

Box 6.1. Concepts of equity in education

Meritocracy

Under this concept, educational outcomes are redistributed based on merit. For instance, the OECD reports the percentage of students who expect to complete tertiary education by the level of their reading performance and socio-economic status (Panel A in Figure 6.1). In 2018, on average across OECD and even within the same reading proficiency level (merit), the expectations depended heavily on the socio-economic background of students. Under a meritocratic distribution, approximately equal levels of expectations within proficiency levels would be expected (Panel B in Figure 6.1). One of the biggest challenges when evaluating equity based on the concept of meritocracy is to find a suitable measurement of merit. Indeed, reading performance might not be the best merit based on which to evaluate equity in expectations to complete tertiary education.

Figure 6.1. Percentage of students who expect to complete tertiary education



Note: ESCS quartile relates to OECD Programme for International Student Assessment (PISA) index of economic, social and cultural status (ESCS) (OECD, 2019[5]).
Source: OECD (2019[5]), PISA 2018 Results (Volume II): Where All Students Can Succeed, Table II.B1.6.6 and Table II.B1.6.7, 10.1787/b5fd1b8f-en (Panel A).

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Minimum standards

The measure of minimum standards focuses on whether some minimum educational outputs are achieved by everyone. For instance, Target 4.1 of the Sustainable Development Goals aims to ensure that all girls and boys complete primary and secondary education by 2030 (United Nations, n.d.[6]). The minimum standard is, in this case, full primary and secondary education completion.

Impartiality

Impartiality quantifies the relationship between an outcome variable and a measure of circumstance. The measure of circumstance can be gender, socio-economic background, immigrant status, etc. For example, the OECD regularly reports PISA reading, mathematics and science scores by gender, socio-economic and immigrant background (OECD, 2019[5]). Education at a Glance 2021, which specifically focused on equity in education, reported a wide range of outcomes related to participation and progression through education disaggregated by gender, socio-economic status, immigrant background (country of origin) and geographic location (sub-national regions) (OECD, 2021[7]). There is no single way of quantifying the relationship between an outcome variable and a measure of circumstance. Thus, the practice varies from simple disaggregation of student outcomes by groups to more complex estimations of relationships (correlation coefficients or proportion of variance explained by circumstances).

Equality condition

While impartiality focuses on absolute levels of (in)equity, the equality condition is concerned with distribution of educational variables (often resources) across the population. For instance, the OECD reports how various resources hinder instruction (based on school leaders' reports) across performance or socio-economic groups (OECD, 2020[8]).

Redistribution

Redistribution concerns whether educational inputs are distributed equally or, for instance, unequally to compensate for existing disadvantages. Redistribution is often applied in education finance. For example, in some countries, such as in England (United Kingdom), pay scales for teachers in high-income areas are higher to compensate for the fact that living expenses there are higher (Department for Education, 2022[9]).

Source: UNESCO-UIS (2018[4]), Handbook on Measuring Equity in Education, http://uis.unesco.org/sites/default/files/documents/handbook-measuring-equity-education-2018-en.pdf (accessed 10 July 2022).

In practice, however, the perspectives taken towards the operationalisation of equity are often narrow and simplified to a disaggregation of student outcomes or an observation of inequalities in students' performance (e.g., through the standard deviations of students' scores, percentile deviations of students' scores) (Appels et al., 2022[10]). Studies rarely explain what equity involves beyond the disaggregation of student performance, such as the role of schools in counterbalancing inequities, or the interactions between student performance, background characteristics, teachers and the broader environment (ibid.).

The importance of monitoring progress in improving equity in education is closely related to the rationale for equitable education in general. As mentioned in Chapter 1, disparities in learning outcomes are related to a range of negative outcomes later in life (UNESCO-UIS, 2018[4]). Furthermore, high inequities in education resulting from a lack opportunities can lead to the misallocation of skills and talent, and thus hinder economic growth (Hsieh et al., 2013[11]; OECD, 2018[12]).

While there is no agreed distinction between the monitoring of progress in improving equity and in improving inclusion, it is possible to differentiate the two by focusing on the conceptualisation in Chapter 1. Based on these definitions, the monitoring of progress in improving inclusion should be broader in focus than for equity. In addition to examining whether all students have equal opportunities to reach their potential, the monitoring of progress in improving inclusion should also focus on how students feel at school, their well-being outcomes and socio-emotional development (Mezzanotte and Calvel, Forthcoming[13]). Inclusion indicators can also examine whether students are truly included in the school setting (e.g., their sense of belonging) or just integrated; and explore the potential barriers students may face with regard to inclusion. One approach to monitoring inclusion is to focus on processes in the education system, in addition to inputs and outcomes (Box 6.2).

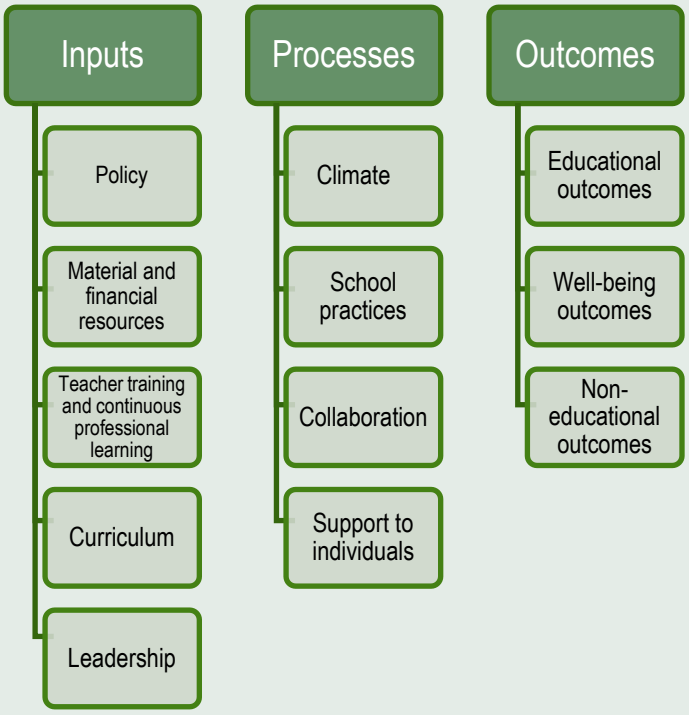
Box 6.2. Inputs-processes-outcomes model

The inputs-processes-outcomes model combines three dimensions to create a comprehensive framework for identifying areas requiring more intervention. Inputs include all sources provided to the system. These include not only financial resources but also policies, teacher training, curriculum and leadership. Processes are practices in schools such as the development of school climate, collaboration or support to individuals. Processes ultimately transform inputs into outcomes. Outcomes include educational outcomes (e.g., participation, dropout, grade repetition rates and achievement), well-being outcomes (such as sense of belonging, mental health and school climate) and non-educational outcomes (for example economic and labour market outcomes, and health outcomes) (Figure 6.2). By focusing on inputs and processes in addition to outcomes, the model can shed more light on the potential causes for regressed outputs.

The inputs-processes-outcomes model allows for the monitoring of progress in relation to both equity and inclusion. By focusing on outcomes, it can measure, for instance, how educational well-being or non-educational factors differ by student groups. The process dimension of the model goes beyond

educational outcomes and examines factors such as school climate, collaboration and the support individuals – and can thus, to some extent, show whether the system has the capacity to adjust to the needs of the student groups under analysis. The inputs part of the model can shed light on both equity and inclusion: it can show, for instance, the extent to which financial resources are distributed equally to compensate for existing disadvantages but also, for example, whether curricula are truly inclusive of all students. The model has been adopted in education, such as in Education at a Glance 2018 (OECD, 2018[14]).

Figure 6.2. Inputs-processes-outcomes model



Source: Adapted from Mezzanotte and Calvel (Forthcoming[13]), Indicators of inclusion in education: a framework for analysis.

The monitoring of progress in improving inclusion also involves a greater emphasis on individual experiences rather than those of groups or categories (UNESCO, 2020[15]). Indeed, the more inclusive a school is, the less it needs to use categorical data given that fewer students require identification or support (ibid.). School-level approaches towards monitoring the progress in improving inclusion might thus be more appropriate. These are summarised in the section on Supporting schools in improving equity and inclusion practices through evaluation processes.

Data collection practices are diverse

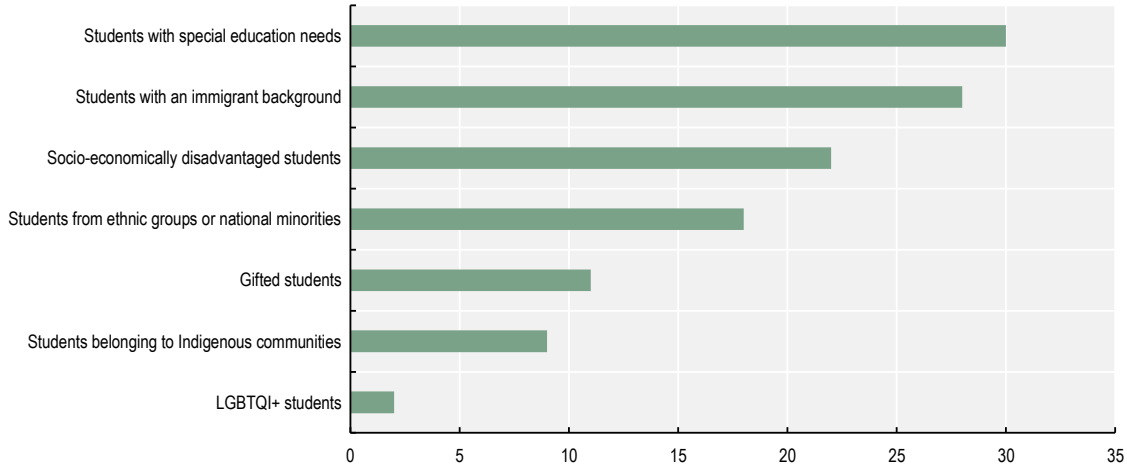
The evaluation of the progress towards reaching inclusion and equity goals cannot happen without robust data collections that monitor the access, participation and achievement of all learners. This can include monitoring across specific groups (by gender, immigrant background, SEN, socio-economic or ethnic/Indigenous background, giftedness, and sexual orientation and gender identity) as well as various student outcomes.

The Strength through Diversity Policy Survey 2022[1] indicates that a range of student groups are included in the national data collections of education systems across the OECD. Thirty education systems reported

collecting data on students with SEN, 28 systems on students with an immigrant background, 22 on socio-economically disadvantaged students, 18 on students from certain ethnic groups or national minorities, 11 on gifted students and nine on students belonging to Indigenous communities. Only Canada and Chile collected data on LGBTQI+ students (Figure 6.3).[2]

Figure 6.3. Data collections on diversity (2022)

Number of education systems that collect data on the following groups (ISCED 2)



Note: This figure is based on answers to the question "Does a national (or sub-national) authority collect data on these groups of students at ISCED 2 level?". Thirty-one education systems responded to this question. Response options were not mutually exclusive.
Options selected have been ranked in descending order of the number of education systems.
Source: OECD (2022[16]), Strength through Diversity Policy Survey 2022.

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Some dimensions of diversity (namely, giftedness, sexual orientation and gender identity) are underrepresented in data collections, as is acknowledged in international research (McBrien, Rutigliano and Sticca, 2022[17]; Rutigliano and Quarshie, 2021[18]). There are a range of reasons why data for particular dimensions of diversity may not be collected at the national (or sub-national) level. Legislative frameworks in some countries may not allow for the collection of some characteristics (e.g., sexual orientation) due to the private and sensitive nature of such data. Some education systems, such as Portugal (Box 6.3), do not categorise students based on their characteristics but instead focus on the support measures they require. Other education systems adopt colour-blind policies whereby data on certain characteristics, such as ethnic background, are prohibited to be collected by law (see the next section).

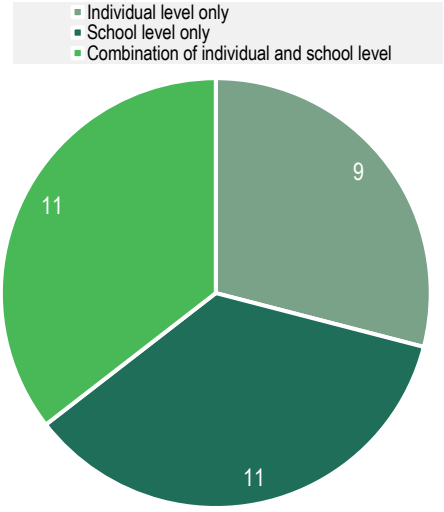
The methods for collecting data also differ across education systems. Some national (or sub-national) authorities collect data at the individual student level while others at an aggregated (e.g., school) level. Individual-level data collections mean that data is collected about each student and then sent to a national (or sub-national) authority. Aggregated level data means that data is sent to a national (or sub-national) authority in aggregates. For instance, each school sends the total number of students with an immigrant background, rather than data on each student's immigration status (which would be collected in an individual-level approach).

Results from the Strength through Diversity Policy Survey 2022 show that aggregated collections were more common as a means for gathering data compared to individual-level data collections (Figure 6.4).

Data was reported as being collected solely at an aggregate level in 11 education systems and solely at the individual level in nine systems. In 11 systems, the level of data collection differed depending on the student characteristic.

Figure 6.4. Type of data collection (2022)

Number of education systems that collect data about students at the following levels (ISCED 2)



Note: This figure is based on answers to the question "Does a national (or sub-national) authority collect data on these groups of students at ISCED 2 level? If so, are data points collected on an individual student level or aggregated on e.g., school level?". Thirty-one education systems responded to this question.
Source: OECD (2022[16]), Strength through Diversity Policy Survey 2022.

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Individual-level data collections enable policy makers to consider intersectionality in their analyses and policy implications. Aggregated data are only as applicable for an intersectional analysis as they are set up during the collection. For example, a country with aggregated data collections would only be able to know the number of female students with an immigrant background if it specifically asked for that particular number and dimensional intersection from each school. On the other hand, by collecting individual-level data with attributes on both gender and an immigrant background, it is straightforward to create aggregate statistics for the intersection.

Practices around labelling diverse students differ

Labelling students with a particular need, ethnicity or other type of background can have both positive and negative impacts. Labelling is viewed as advantageous by some teachers: classification can help to identify and explain the limitations and potential negative consequences of current practice. For example, some teachers feel that student Attention Deficit Hyperactivity Disorder (ADHD) classifications can help explain why regular practice does not suffice and legitimates a different approach (Mezzanotte, 2020[19]; Wienen et al., 2019[20]). Classifications can also bring consistency to research and communication, and can be useful in the assessment and placement of students in special programmes or settings (OECD, 2022[21]; Thomson, 2012[22]). For some typologies of SEN, the label can also bring some “relief” to students or parents, who can then better understand the driver of certain difficulties or struggles at school. Diagnosis or clarification can thus explain the causes of student behaviour, bring empathy and offer resolution (Mezzanotte, 2020[19]; Wienen et al., 2019[20]).

The absence of student labels can also make some students invisible to policy makers and can silence the experiences of diverse groups (Öhberg and Medeiros, 2017[23]; Simon, 2017[24]). After all, if data is not collected, no gaps can be seen. This may cause stakeholders in the education system to remain or become ignorant of the needs of some students. In the Netherlands, students with SEN are not labelled as such and individual schools are meant to monitor the progress of students with a "progress and development plan" (Inspectorate of Education, 2022[25]). However, while individual schools might have a good overview of these students, national data are of poor quality (ibid.). An accurate picture of the trends in the number of students with SEN (with a progress and development plan) and their outcomes in and through education is therefore limited (ibid.). In the Slovak Republic, it was estimated that due to limits in data collections on "disadvantaged socio-economic background", only 39% of students at risk of poverty or social exclusion have been targeted by financial contributions for disadvantaged students (Hellebrandt et al., 2020[26]). In the area of intersectionality, research points out that the often reported gender gap in learning outcomes varies significantly by socio-economic status or the ethnicity of students (OECD, 2019[5]; Strand, 2014[27]). However, these kinds of intersections of students' identities and heterogeneities are often absent in monitoring systems and thus are not considered in policy responses (Varsik and Gorochovskij, Forthcoming[28]).

Opponents to labelling argue that equality and national cohesion of ethnic groups and national minorities is achieved through invisibility, i.e., all are equal before the law without a distinction between ethnic groups (Balestra and Fleischer, 2018[29]; Simon, 2017[24]). Some European countries have on this basis adopted a "colour-blind" approach to data collection on ethnic groups. Under this policy, data on ethnic groups are not collected or, if they are collected, they are not considered in policy making.

Some researchers have also argued that labelling may result in teachers having lower expectations of the performance of certain students due to their preconceptions regarding the abilities of students belonging to diverse groups (Hart, Drummond and McIntyre, 2007[30]). Labelling may in this way result in students not being viewed as individuals but judged based on stereotypical preconceptions (OECD, 2022[21]; Osterholm, Nash and Kritsonis, 2007[31]). According to some teachers, labelling also has no value for educational practice without a further analysis of the student needs (Mezzanotte, 2020[19]; Wienen et al., 2019[20]). Furthermore, by labelling students, teachers and other stakeholders in the system might focus on deficits of students, rather than directing their attention as to how the system can help underperforming students (Ainscow and Messiou, 2017[32]). Finally, in the context of inclusion of students, inclusion cannot happen one group at a time; the process must encompass all students (UNESCO, 2020[15]). From this standpoint, data disaggregated by characteristics might seem irrelevant. As a result, some education systems are changing their approaches in order to limit the potentially negative consequences of labelling (Ebersold et al., 2020[33]). In Portugal, for example, students are no longer categorised by their characteristics (ethnic or immigrant background, SEN etc.), but by the type of educational support measure(s) they need (Box 6.3).

Box 6.3. Reform and monitoring of inclusive education in Portugal

As part of this legislative changes since 2018, Portugal shifted its emphasis from identification of student characteristics to identification of student support measure(s). Portugal no longer collects information on student characteristics (except for gender and nationality) on the rationale that it is not necessary to categorise in order to intervene. The identification of students' needs happens at the school level and is conducted as early as possible in co-operation with a range of stakeholders including parents/guardians, social services or relevant teaching as well as non-teaching staff. The initial identification is followed by an approval for assessment and mobilisation of a multidisciplinary team. The team is also responsible for implementation and monitoring of the support measures.

As a result, the system collects information on students falling into one of three categories of support

measures: universal measures, selective measures and additional measures. A student in each category can benefit from a wide spectrum of interventions ranging from curriculum accommodation/enrichment, tutoring, pedagogical-psychological support to redesigning of the pedagogical strategy, including significant curricular adjustments.

Portugal has co-operated with the European Agency for Special Needs and Inclusive Education to develop a monitoring system that will enable stakeholders to assess the effectiveness of the inclusion law. This new monitoring system was developed in 2022 and consists of six standards, 11 indicators and 19 related questions that monitor the level of implementation of the identified standards (European Agency for Special Needs and Inclusive Education, 2022[34]).

Source: OECD (2022[21]), Review of Inclusive Education in Portugal, https://doi.org/10.1787/a9c95902-en.

Finally, identifying groups at an aggregate level might be required for other purposes than targeted support, such as maintaining statistical databases or allocating resources. As elaborated in Chapter 3, almost all education systems that provided answers to the Strength through Diversity Policy Survey 2022 reported accounting for various student backgrounds in their funding formulas. These labels may not impact how teachers view their students. In fact, assigning a label based on administrative data can occur without assigning the same label in the classroom (UNESCO, 2020[15]). In Finland, for instance, diagnostic labels are not used in the classroom, because the system focuses on the needs of individual students, regardless of their characteristics. For administrative purposes, however, certain statistics can be disaggregated by student groups, such as those of students with physical impairments (Jahnukainen and Itkonen, 2010[35]).

Monitoring mostly focuses on academic outcomes

The lives and experiences of students are shaped by a range of factors. Apart from learning, students also spend a considerable time at school socialising with their peers and interacting with school staff. Academic outcomes are only one aspect of the overall school experience, and it is important to understand how happy and satisfied students are with different aspects of their life, how connected they are to others and whether they enjoy good physical and mental health (Cerna et al., 2021[2]). This understanding can be developed through collecting data on a range of student well-being outcomes, including academic, psychological, physical, social and material (ibid.). These dimensions are key ingredients of the concurrent well-being of individuals and contribute to their personal development in the short-, medium- and long-term (ibid.).

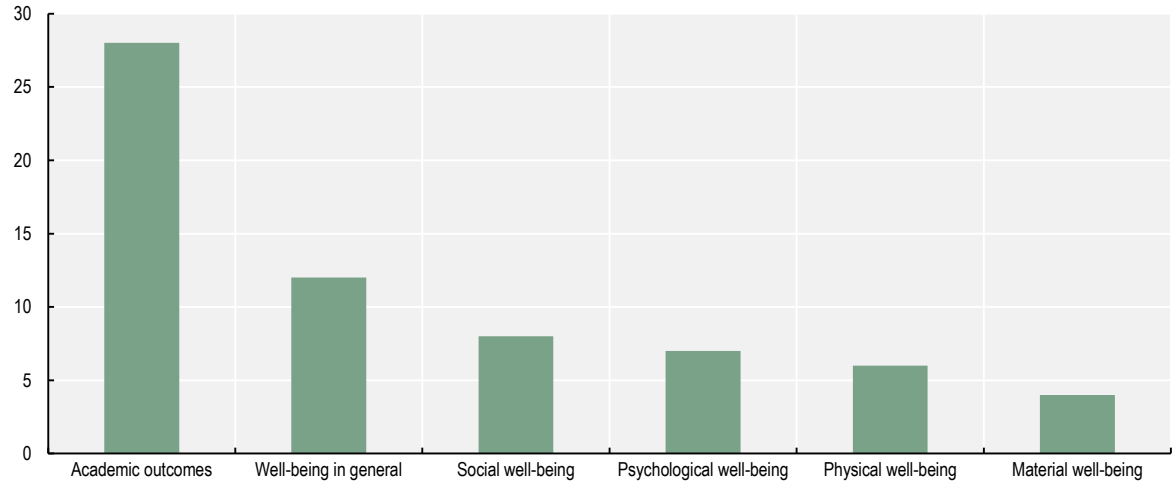
The Strength through Diversity Project considers multiple aspects of student well-being: academic, psychological, physical, social and material (Cerna et al., 2021[2]). The psychological dimension of students' well-being includes students' views about life, their engagement with school, the extent to which they have a sense of agency, identity and empowerment, and their opportunities to develop goals and ambitions for their future. Physical well-being relates to students' health status, safety and security, the ability to engage with others without physical barriers in access and mobility. Social well-being refers to the quality of students' social lives. This includes relationships with peers, family and school staff. Finally, material well-being considers the material resources available that enable families and schools to cater to students' needs.

However, despite growing research on the positive associations between high levels of student well-being and positive and fulfilling life-experiences (Pollard and Lee, 2003[36]), performance (Gutman and Vorhaus, 2012[37]) and negative associations with risky behaviours (such as drinking and smoking) (Currie et al., 2012[38]), schooling is in many education systems organised with the aim of maximising learning outcomes, sometimes at the expense of overall well-being. This is reflected in data collections, which tend to focus on learning outcomes, with comparatively little attention given to indicators of other aspects of well-being.

Most education systems (28) who participated in the Strength through Diversity Policy Survey 2022 reported focusing their official data collections on academic outcomes for students irrespective of specific groups (Figure 6.5). While 12 systems collected data on general well-being outcomes, collecting data on specific types of well-being was less common for students irrespective of specific groups. Eight education systems considered social well-being, seven systems psychological well-being and six physical well-being in their data collections. Material well-being outcomes were rarely included in national or sub-national data collections (with only four education systems reporting that they collected data on this aspect of well-being).

Figure 6.5. Data collections on students irrespective of specific groups (2022)

Number of education systems that collect data at least once during ISCED 2 on students irrespective of specific groups



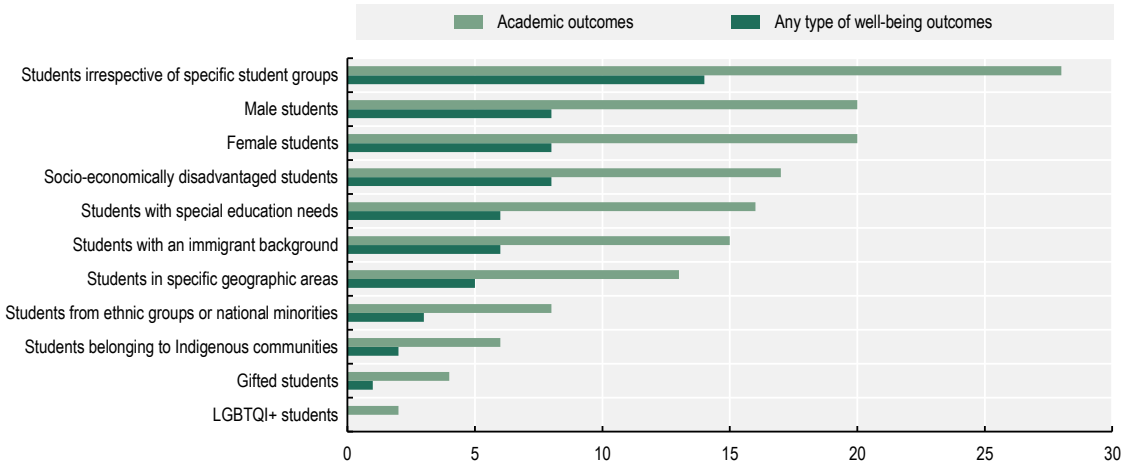
Note: This figure is based on answers to the question "Which dimensions of student outcomes are nationally (or sub-nationally) collected at least once during ISCED 2 level? [Students irrespective of specific student groups]". Thirty-one education systems responded to this question. Response options were not mutually exclusive.
Options selected have been ranked in descending order of the number of education systems.
Source: OECD (2022[16]), Strength through Diversity Policy Survey 2022.

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Education systems most commonly reported collecting data on the academic and well-being outcomes of students irrespective of specific groups (Figure 6.6). The dimensions of diversity that were most common in group-focused data collections were gender, socio-economic and immigrant background, SEN, and location in specific geographic areas. Only eight and three education systems collected academic and well-being data respectively for students from ethnic groups or national minorities. Six and two systems collected academic and well-being data respectively on students belonging to Indigenous communities and data collections on gifted and LGBTQI+ students were even rarer. For all student groups, data on any type of well-being outcomes were collected considerably less often than data on academic outcomes.

Figure 6.6. Data collections on academic and well-being outcomes (2022)

Number of education systems that collect data at least once during ISCED 2 on the following groups



Note: This figure is based on answers to the question "Which dimensions of student outcomes are nationally (or sub-nationally) collected at least once during ISCED 2 level?". Thirty-one education systems responded to this question. Response options were not mutually exclusive. Any type of well-being outcomes can include one or more of the following: psychological well-being outcomes, social well-being outcomes, material well-being outcomes, physical well-being outcomes, well-being outcomes in general.
Options selected have been ranked in descending order of the number of education systems that selected any type of well-being outcomes.
Source: OECD (2022[16]), Strength through Diversity Policy Survey 2022.

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This trend is also visible in international research. In many education systems, student experiences at school remain unmonitored. For instance, systematic data collections on anti-LGBTQI+ bullying in schools are in place in only four countries (Finland, France, the Netherlands and Sweden), despite the fact that LGBTQI+ students are consistently reporting higher rates of bullying compared to their peers (IGLYO, 2022[39]; McBrien, Rutigliano and Sticca, 2022[17]). Furthermore, those collections often differ in the extent of detail they cover. In Sweden, for instance, the school inspectorate monitors bias-motivated bullying in schools that can be based on the sexual orientation or gender identity of the victim (IGLYO, 2022[39]). In other countries, however, the data is less detailed and more generic (McBrien, Rutigliano and Sticca, 2022[17]).

Instruments used to measure progress towards equity and inclusion

Data can be used by policy makers and other stakeholders to monitor progress, evaluate outcomes and ultimately improve students' learning and other well-being outcomes. One common approach to summarising data collections comes in the form of indicator frameworks. Other instruments include the use of national assessments with background data, national or international longitudinal and key stakeholder surveys, and specific reviews on equity and inclusion.

Data collections happen within an educational context under different policy regimes. As a result, the methods for collecting data differ across education systems and no country uses a single instrument to measure progress towards equity and inclusion. Most often the approaches are combined. For instance, results from national assessments and surveys are often used in indicators frameworks and specific reviews on equity and inclusion.

Indicator frameworks

The joint international standardised data collection by UNESCO, OECD and EUROSTAT has been a major driver of the collection of international information on equity in education. The data are summarised in indicators and published in various reports, including Education at a Glance, which focuses on equity and inclusion in education every three years (most recently in 2021) (OECD, 2021[7]). The OECD has published a number of reports that focus on equity in and beyond education, although these mainly focus on disparities in terms of socio-economic background, gender, immigrant background and geographic location (e.g., in terms of urban/rural differences) (OECD, 2012[40]; OECD, 2017[3]; OECD, 2018[14]). Performance scores are often disaggregated by one or more dimensions of diversity. The effect of socio-economic background on performance is often examined: as score-point difference in performance associated with one-unit increase in the index of economic, social and cultural status, or percentage of the variation in performance explained by the index (OECD, 2019[41]). Beyond education, indicators focus on labour market outcomes, such as earnings or labour market participation by educational attainment (OECD, 2018[14]). Data on adult skills or educational attainment by socio-economic background are also often reported (OECD, 2017[3]). More recently, the OECD engaged in developing a dashboard of indicators on equity in and through education (Box 6.4).

A key challenge is designing indicators in a way that adequately represents the value they are measuring. While national education goals and objectives may be comprehensive and broad, monitoring systems may be rather limited in the information they can offer. For instance, as was elaborated in the previous sections, measures of inclusion need to collect a wide range of data outside of the domain of learning outcomes. These may not be available, challenging and costly to obtain if new data sources and data infrastructures need to be created. In some areas, such as quality of the teaching force, data might not even be possible to obtain. In this context, it is difficult to create indicator frameworks that are feasible, reliable, with high coverage and validity (OECD, 2013[1]). It is therefore important to consider the purpose of each indicator so that it designed in a considered manner with the goal to measure what is valued, rather than value what is measured (Ainscow, 2005[42]). That way, policy makers and other stakeholders can limit the possibility that the measure itself becomes the target.

Box 6.4. Dashboard of indicators on equity in and through education

In 2022, the OECD engaged in developing a dashboard, whose objective was to position OECD countries across a range of indicators on equity in and through education. The dashboard has two overarching aims and five policy aims. The overarching aims are: (1) enabling all learners to developing the knowledge, skills, attitudes and values to thrive in equitable and inclusive societies; and (2) ensuring that education contributes to equitable economic and social outcomes. The five policy aims include: (a) raising educational outcomes through more equitable education opportunities; (b) investing in the early years; (c) empowering teachers and school leaders to support equity in and through education; (d) aligning resources with the needs of learners; and (e) enabling an inclusive school environment. As a result, equity in and through education is measured using 35 key comparative indicators often disaggregated by age, gender and socio-economic status.

In the process of the dashboard development, the OECD also identified several gaps and limitations in the existing data. These included a lack of information on the early years of education, particularly in terms of country coverage, teacher quality and teaching practices. Data on the quality of initial education and continuous professional learning for teachers and school leaders was also generally hard to find. Challenges were also visible in measuring equity throughout the student's education, especially when focusing on enrolment in, access to and graduation from upper secondary and tertiary education by students' characteristics.

Some important areas could not be covered due to lack of information or data based on subjective students', teachers' or school leaders' reports. These areas include attitudes and values of students and young adults, skills to thrive in a digital world and on socio-emotional skills, social outcome indicators (civic engagement, for instance), and engagement with parents and communities. Other highlighted challenges included the timeliness of data (e.g., the Survey of Adult Skills, a product of the Programme for the International Assessment of Adult Competencies (PIAAC), is relatively old), lack of data focusing on inclusion as a process, and insufficient data on ethnic groups, refugees, LGBTQI+ students, gifted students and students with SEN.

Source: OECD (2022[43]), Dashboard of indicators on equity in and through education, OECD document for official use, EDU/EDPC(2022)20/ANN.

Reference points for measuring progress in advancing equity and inclusion

At the national (or sub-national) level, many education systems embed indicators into strategies, action plans or national improvement frameworks that set out goals for equity and inclusion. This can be done to monitor progress, and clarify the vision and objectives of the administration, while reducing and aggregating the abundance of available information to several key elements (Gouëdard, 2021[44]). Furthermore, by including an equity component in the strategy (e.g., disaggregation of outcomes by dimensions of diversity), the success of the policy can also be measured in relation to specific student groups.

New Zealand's Child and Youth Well-being Strategy, for instance, measures progress towards six defined well-being outcomes (and equity in relation to those outcomes) (Department of the Prime Minister and Cabinet, 2020[45]). In education, these cover participation, attendance, literacy, numeracy, science skills, socio-emotional skills and self-management skills. In Japan, the Third Basic Plan for the Promotion of Education (2018-22) focuses on well-being outcomes (OECD, 2019[46]). These include improvement in "the percentage of students in [primary and secondary] schools who do not eat breakfast" or improvement in "the percentage of students in [primary and secondary] schools who go to bed at around the same time every day and who wake up at around the same time every day" (Ministry of Education, Culture, Sports, Science and Technology, 2018[47]). In many cases, the strategies also include more specific instruments that measure the progress towards equity and inclusion.

Goals related to equity and inclusion are also central to the Scottish (United Kingdom) National Improvement Framework, with the specified key priorities including closing the attainment gap between advantaged and disadvantaged students, improving students' health and well-being, and placing the human rights and needs of every child and young person at the centre of education. These key priorities reflect the vision for education specified in the Framework, which is to deliver both excellence and equity, ensuring that every child and young person is able to thrive and has "the best opportunity to succeed, regardless of their social circumstances or additional needs" (Scottish Government, 2021[48]). Similarly, in Latvia, ensuring equal opportunities is one of the strategic objectives of Latvia's National Development Plan for 2021-2027 (Cross-Sectoral Coordination Center, 2020[49]).

National curricula can serve as reference points, given that countries often use national assessments to monitor the implementation of the national curriculum and/or progress against specific student learning objectives or educational standards (OECD, 2013[1]). National curricula can also articulate equity and inclusion as overarching goals for education to ensure that the value of equity is both taught and modelled in schools (OECD, 2021[50]). In Estonia, for instance, the values of "honesty, compassion, respect of life, justice and human dignity" are embedded in the national curriculum across various themes (OECD, 2021, p. 95[50]).

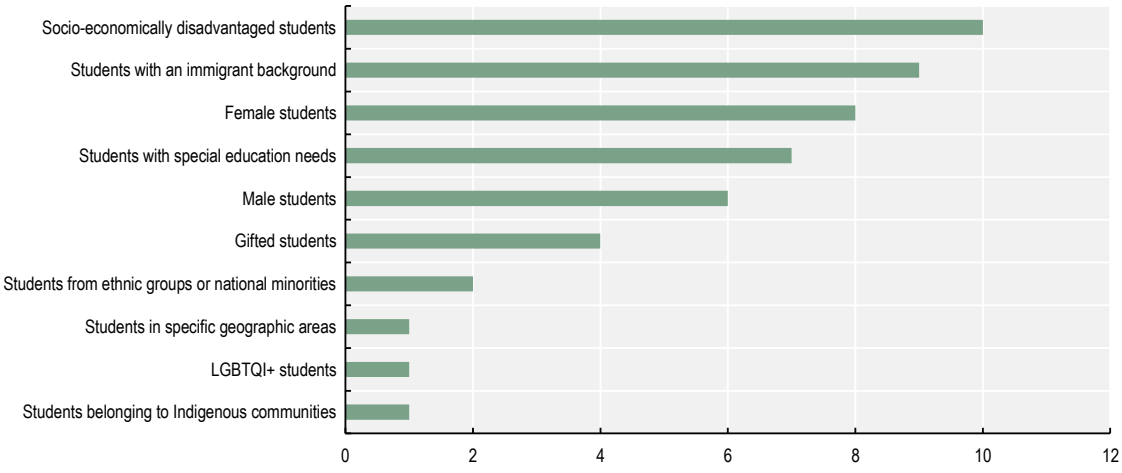
Education systems define a wide range of indicators

Indicators often include targets that can help instigate action. Targets can help policy makers identify the biggest gaps, quantify how much action is needed in different priority areas and monitor progress over time. If a strategy contains a specific target value for a policy or a set of policies, policy makers and other stakeholders can use it to evaluate whether the goals were met.

The results of the Strength through Diversity Policy Survey 2022 show that most OECD education systems did not define indicators specific to student groups (Figure 6.7). The indicators that were reported focused on equity and mostly measured impartiality (Box 6.1), i.e., whether educational outcomes differ for various student groups. Most education systems defined indicators with a focus on socio-economically disadvantaged students (ten systems), with an immigrant background (nine systems), female or male students (eight and six systems respectively), and students with SEN (seven systems). Four education systems reported having indicators specific to gifted students, and two systems specific to ethnic groups or national minorities. The other dimensions of diversity were represented even less often.

Figure 6.7. Indicators (2022)

Number of education systems that define indicators specific to the following groups (ISCED 2)



Note: This figure is based on answers to the question "Does your education jurisdiction define nationally (or sub-nationally) indicator(s) specific to any of the groups of students at ISCED 2 level?". Twenty-five education systems responded to this question. Response options were not mutually exclusive.
Options selected have been ranked in descending order of the number of education systems.
Source: OECD (2022[16]), Strength through Diversity Policy Survey 2022.

StatLink https://stat.link/c2qm9j

Where education systems had indicators related to students with an immigrant background, these mostly examined their school participation rates and results (OECD, 2022[16]). Iceland and Spain reported monitoring immigrants' results based on international large-scale surveys, such as the PISA, with Iceland having set a target for students with an immigrant background to reach the OECD PISA average in reading, mathematics and science (OECD, 2022[16]). Targets in Latvia focused on full participation of minors who were granted asylum status and children of returning migrants, and in Lithuania on full participation of citizens of foreign countries.

Education systems reported monitoring students with SEN and gifted students largely in terms of whether they were labelled as such, which educational setting they were placed in (e.g., dedicated or mainstream schools) and whether they had received specific educational support (OECD, 2022[16]). In Spain, for instance, the indicators focus on the number of students with SEN and gifted students in education disaggregated by the typology of SEN, gender and the type of school. In Lithuania, targets are set for the proportion of students whose needs for additional support are met (85% in 2025 and 97% in 2030) as well as proportion of students with disabilities receiving inclusive education in mainstream education settings (85% in 2025 and 90% in 2030).

Socio-economically disadvantaged students were also explicitly targeted with indicators in some instances (OECD, 2022[16]). In England (United Kingdom), the education system monitors the disadvantaged gap index. It summarises the relative attainment gap between disadvantaged students and all other students. In Scotland (United Kingdom), achievements in the expected level in literacy and numeracy are reported by socio-economic background of students. Moreover, broader well-being outcomes are monitored, particularly as a potential consequence of the COVID-19 pandemic: the gap in total difficulties score between students (aged 13 and 15) in the most deprived and least deprived areas.[3]

Other education systems reported monitoring disadvantaged students indirectly (OECD, 2022[16]). One of the indicators in the Flemish Community of Belgium focuses on early leavers from education and training developed by EUROSTAT.[4] In Latvia, the provision of portable computer equipment for disadvantaged students is monitored as part the 2021-3 Action Plan of the Education Development Guidelines 2021-7.

Indicators targeting gender gaps often focus on academic outcomes (OECD, 2022[16]). In Iceland, the percentage of female and male students reaching level 2 or higher in PISA in reading, mathematics and science are monitored, with targets being set for the year 2025 for each subject and gender. In Northern Ireland (United Kingdom), mid-upper secondary examination results are reported as being disaggregated by gender. In Estonia, drop-out rates from lower secondary education are monitored by gender, while the participation of girls in science, technology, engineering and mathematics (STEM) programmes are monitored in the Flemish Community of Belgium and Ireland.

Two education systems (Chile and the Slovak Republic) reported having indicators related to students from ethnic groups and national minorities and one education system had indicators related to students belonging to Indigenous communities. In the Slovak Republic, the “Roma Strategy of Equity, Inclusion and Participation” sets the target of decreasing the number of Roma early school leavers by half (to 36%) and decreasing the number of Roma students attending ethnically homogenous classes by half (to 30%) by 2030 (OECD, 2022[16]).

Finally, some education systems reported having developed indicator frameworks related to Indigenous peoples. Such indicators are, for instance, set out in Australia’s “Closing the Gap” framework, which was developed to close the gap between Indigenous peoples and the majority population in areas such as child mortality, early childhood education, school attendance, literacy and numeracy, upper secondary education attainment, employment, and life expectancy (Commonwealth of Australia, 2020[51]). For each of these areas, there is a clearly stated target provided with a timeframe (e.g., “95 per cent of all Indigenous four-year-olds enrolled in early childhood education (by 2025)”) and progress with relevant statistics documented. Data is also provided at the provincial level.

National assessments with background data

In 2015, 27 and 30 out of 38 surveyed OECD systems administered national assessments or examinations during primary and upper secondary levels (general programmes), respectively (OECD, 2015[52]). National assessments and examinations are standardised student achievement tests. While national assessments do not affect students’ progression through school or certification, national examinations have a formal consequence for students, such as an impact on a student’s eligibility to progress to a higher level of education or to complete an officially-recognised degree (ibid.). The uses as well as methods for

administering the national assessments and/or examinations varied across education systems. The main purpose of national assessments at lower secondary level was to provide teachers with student diagnostic information and the main purpose of national examinations at the upper secondary level was to determine student entry to tertiary education (ibid.). National assessments/examinations also varied greatly in terms of the subjects covered and whether they were administered to all students or just a sample (ibid.).

While sample-based surveys generally suffer from shrinking samples and larger estimation errors as the focus shifts to individuals with multiple specific characteristics (UNESCO, 2020[15]), national assessments/examinations are often administered to the full cohort of students, giving way for analyses that explore the outcomes of groups of students that have very low populations. However, various factors have an impact on student results and countries exercise caution when publishing disaggregated outputs. Analyses with an intersectional focus that consider multiple dimensions of diversity are thus rarely applied. When conducted, these revealed, for instance, that SEN identification is heterogeneous across various dimensions of diversity. Disadvantaged students aged 5-16 were approximately twice as likely to be identified with SEN in England (United Kingdom), controlling for gender and ethnic background (Strand and Lindorff, 2018[53]; Strand and Lindsay, 2008[54]). Boys were more likely to be identified with SEN compared to girls, controlling for ethnic and socio-economic background (Strand and Lindorff, 2018[53]; Strand and Lindsay, 2008[54]).

Comprehensive information on the extent to which assessments include background data of students is not available. The results from the Strength through Diversity Policy Survey 2022 on data collections on diversity (Figure 6.3) indicated that some dimensions of diversity, such as sexual orientation or gender identity, were collected to a much lower extent (if at all) than others. Indeed, gender and geographic locations are two characteristics that are often used to present results from student assessments. For instance, Italy and Poland publish results from their student assessments disaggregated by gender and geographic location (Central Examination Commission, 2019[55]; INVALSI, 2022[56]). Some education systems publish information from student assessments by a range of other categories. In England (United Kingdom) results of student assessments at the upper secondary level are published by SEN, ethnicity and socio-economic background (determined on the basis of free school meals eligibility) in addition to gender and geographic location (Department for Education, 2022[57]). Estonia publishes results of the state examination by students' language of instruction, including sign language, gender and geographic location (Examination Information System, 2022[58]). The Slovak Republic publishes selected results from the lower secondary student assessment disaggregated by gender, socio-economic background, type of school and geographic location (NUCEM, 2022[59]).

Some students, such as students who arrived in the country during the school year in which they would normally be tested or less than one year beforehand, or students with SEN (particularly if they are enrolled in dedicated schools), might be excluded from participation in nation-wide assessments (European Education and Culture Executive Agency, Eurydice, 2011[60]). Exclusion of students from assessments may result in limited data on the progress of these student groups at the national (or sub-national) level. Sometimes, education systems make accommodations to the tests so that participation increases. For instance, several education systems provide tests in Braille or enlarged letters for students with visual impairments, or adapted material for pupils with physical disabilities (ibid.). For those with more severe typologies of SEN, students can also have an assistant, interpreter or special teacher at disposal during testing (European Education and Culture Executive Agency, Eurydice, 2011[60]; Hellebrandt et al., 2020[26]). Other accommodations include more time to take the test, more frequent breaks during testing, and the use of various forms of support (including magnifying glasses, special reminders or information leaflets, etc.) (European Education and Culture Executive Agency, Eurydice, 2011[60]). Finally, computer-based assessments can, in some instances, improve the accessibility of the test for some students with SEN, given that computerised accessibility tools can be incorporated into the assessment platform, as was recently done in the Pan-Canadian Assessment Programme (Council of Ministers of Education Canada, 2019[61]).

Publication of national assessment results: impacts on equity

National assessments and examinations are sometimes also used with the additional purpose of holding schools accountable. A common approach in this regard is to make aggregated school results publicly available. The provision of information could, in theory, achieve two outcomes: (1) lower the information asymmetry about overall student performance between school insiders and outsiders (e.g., parents, national (or sub-national) authorities); and (2) provide incentives to align the actions taken by school leaders with those set by governing bodies or national (or sub-national) authorities by focusing on pre-defined standards, subjects or contents that are measured (Torres, 2021[62]). While the impact of publication of school results has been shown to be positive on the average academic achievement, the evidence is mixed in regards to the impacts on equity in education (Hanushek and Raymond, 2005[63]; Torres, 2021[62]). On the one hand, school accountability systems were correlated with lower overall results for low-performing students in secondary education and increased gaps between majority and minority ethnic groups in England (United Kingdom) and the United States (Burgess et al., 2005[64]; Hanushek and Raymond, 2005[63]). On the other hand, student assessments can have positive consequences for equity in education if they are used to improve awareness of the main challenges in the education system of for particular students (OECD, 2020[8]). Positive correlations were observed between equity in education and the use of student assessments to inform parents about their child's progress; the use of student assessments to identify aspects of instruction or the curriculum that could be improved; and the use of written specifications for student performance on the school's initiative. Higher equity in education was also observed among countries that used assessments to seek feedback from students and to have regular consultations on school improvement (ibid.). Finally, studies showed no substantial impact of test-based accountability practices on educational inequalities (Torres, 2021[62]). For instance, the publishing of school results in Japan did not reveal adverse distributional effects on student performance (Morozumi and Tanaka, 2020[65]).

Depending on how they are designed, the publishing of school results can have unintended consequences with negative implications for equity and inclusion in education (Torres, 2021[62]). These can include increased social segregation among schools (due to parents choosing to enrol their children in better-performing schools) (Davis, Bhatt and Schwarz, 2015[66]), focusing teachers' attention only on the measured subjects, or only on the students who have a realistic chance of passing a given proficiency threshold (Neal and Schanzenbach, 2010[67]). They may also result in teachers focusing on preparing students to "sit the test" rather than the entire curriculum (Jennings and Rentner, 2006[68]). Creating league tables can also cause difficulties in recruiting and retaining teachers in low-performing schools (Clotfelter et al., 2004[69]).

Previous studies have suggested that accountability should not only apply to learning outcomes, but also to school resources, professional capacity and other school processes (Darling-Hammond and Snyder, 2015[70]). The rationale is that schools' outcomes need to be compared only if other aspects of the schooling process are considered, including resourcing and the (quality of) the teaching force (Torres, 2021[62]).

Longitudinal surveys

Longitudinal surveys use administrative data or specialised sample-based surveys to track the same people over time. The biggest advantage of longitudinal population surveys is that they can better determine patterns over time because changes can be observed for the same individuals. In contrast, cross-sectional surveys only provide snapshots of a given situation in time.

Education authorities in several countries co-operate with academic institutions or non-governmental organisations to administer longitudinal surveys. For example, the Millennium Cohort Study, Next Steps and Our Future longitudinal surveys have been conducted by higher education institutions and social research organisations with funding and in co-operation with several governmental departments in the United Kingdom (Centre for Longitudinal Studies, n.d.[71]; Centre for Longitudinal Studies, 2022[72];

CLOSER, n.d.[73]). The surveys offer a wealth of data that can be used for various group comparisons and intersectional analyses related to education and other areas (e.g., health, labour market outcomes). Most of these sources offer information on gender, SEN, ethnic and socio-economic background and some also on immigrant background and sexual orientation (ibid.). Similarly, the Longitudinal Study of Australian Children and the High School Longitudinal Study in the United States contain information on all dimensions of diversity except giftedness (Australian Institute of Family Studies, n.d.[74]; US Bureau of Labor Statistics, n.d.[75]).

Longitudinal surveys can also be created from administrative datasets that contain a unique student identifier that does not change over time. Since 1996, New Zealand assigns a unique student identifier (the National Student Number, NSN) to each student (NZQA, 2022[76]). This allows for monitoring of student enrolment, attendance and tracking of students' educational paths. It is also helpful for various statistical purposes, research purposes and ensuring that student educational records are accurately maintained. The availability of NSNs was more recently used to calculate the Equity Index, consisting of 37 variables that measure socio-economic background and educational achievement in upper secondary education examinations (Ministry of Education, 2022[77]). The 37 variables include parental socio-economic indicators (e.g., education level, income, prison custody, mother's age at her first child), child socio-economic indicators related to poverty, abuse or neglect (e.g., care and protection placement/notification/ investigation of child), national background variables (e.g., country of birth) and transience variables related to moving home or school (e.g., number of home and school changes) (ibid.). Similarly, in the Slovak Republic, the use of unique student identifiers has enabled the monitoring of Roma students' participation in education (from the primary to tertiary levels), and allowed for the analysis of early school leaving rates disaggregated by Roma/non-Roma as well as socio-economically advantaged/disadvantaged populations (Hellebrandt et al., 2020[26]). The use of unique student identifiers has also enabled researchers to compare the educational outcomes of both Roma students and students from socio-economically disadvantaged groups (excluding Roma) with those of the general population and to analyse issues such as within- and between-school segregation and the unequal distribution of SEN identification (ibid.). In Chile, the Provisional School Identifier allows for monitoring and continuity in the educational trajectories of students including those of foreign nationality, and also enables the certification of their studies (Ministry of Education, 2022[78]).

Key stakeholder surveys

Information regarding students' psychological, physical, social and material well-being outcomes are sometimes collected using surveys based on a sample. Such key stakeholder surveys can be used to broaden the evidence on student outcomes to domains that are outside of academic outcomes. Representative sample-based surveys can provide an overall picture of well-being outcomes, while limiting the administrative costs of running a full-population study. The disadvantage is, however, that analyses of student sub-groups is limited by the sample size. This is a particularly pressing issue in quantitative research focusing on intersectionality, where, by definition, researchers need data on students belonging to several sub-groups. Such two-, three- or more dimensional intersections, however, have often extremely small number of observations.

Statisticians have developed several techniques that can ensure representativeness while avoiding low cell counts for certain intersections: stratified random sampling, and purposive, quota or snowball sampling (Else-Quest and Hyde, 2016[79]). Under stratified random sampling, the population is first divided into sub-groups (e.g., intersections) from which individuals are randomly sampled. Purposive, quota or snowball sampling, while no longer representative, are more suitable for qualitative methods, whereby participants are recruited to be typical of the population of interest through networks or by asking research participants to refer eligible peers (Scottish Government, 2022[80]).

The OECD Survey on Social and Emotional Skills uses stratified random sampling and provides reliable and comparable insights at an international level for policy makers and educators on how social and emotional skills relate to key life outcomes (OECD, 2021[81]). The survey collects information on environments at home, in school, among peers and other background characteristics (including gender, immigrant and socio-economic backgrounds) to analyse the complex interactions between these factors and student well-being outcomes. Similarly, the New Brunswick Student Wellness Survey in Canada allows for comparisons of some aspects of psychological, physical, social and material well-being disaggregated by several dimensions of diversity (with some limitations[5]) considered by the Strength through Diversity Project (New Brunswick Health Council, 2022[82]).

Since 2016, the *Institut für Arbeitsmarkt- und Berufsforschung (IAB), Bundesamt für Migration und Flüchtlinge (BAMF), Sozio-oekonomische Panel (SOEP)* (the Institute for Employment Research, Federal Office for Migration and Refugees, Socio-Economic Panel) conduct the IAB-BAMF-SOEP Survey of Refugees in Germany to obtain reliable information on the circumstances faced by people who have sought protection in Germany in recent years. For this purpose, information on refugees' schooling and vocational training and on their current work situation is collected, among other things (Federal Office for Migration and Refugees, 2022[83]). In many countries, however, refugees are absent from systematic and comprehensive data collections in schools (Siarova and van der Graaf, 2022[84]). Researchers have also noted that data collections focusing on refugees are often not comparable between countries, their methodologies vary and available data is often limited and fragmented (European Union and the United Nations, 2018[85]; Wiseman and Bell, 2021[86]).

Absence of data is a particularly challenging problem for researchers focusing on education outcomes of LGBTQI+ students (McBrien, Rutigliano and Sticca, 2022[17]). Most countries do not systematically collect information on sexual orientation and gender identity, nor include it in regular censuses (OECD, 2019[87]).[6] However, some practices around the collection of data on LGBTQI+ students exist. In the United States, the National School Climate Survey provides information on some aspects of student psychological, social and material well-being outcomes with particular focus on LGBTQI+ students. The survey reports on experiences of discrimination, harassment, school climate and resources of lesbian, gay, bisexual, transgender and queer youth (Kosciw et al., 2020[88]).

Survey non-response presents a major challenge

High non-response rates make analyses of some student groups particularly challenging in sample-based surveys (UNESCO, 2020[15]). Some student groups might be hesitant to disclose sensitive information of their identity for fears of discrimination or persecution. This is particularly challenging for ethnic minorities and Indigenous populations. In the United States, Black or African American alone or in combination, American Indian or Alaska Native alone or in combination, and Hispanic or Latino populations were the most undercounted in the 2020 census (Jensen and Kennel, 2022[89]). Roma populations in Europe and Indigenous populations are also hesitant to self-identify resulting in their underrepresentation in censuses (Csata, Hlatky and Liu, 2020[90]; Jamieson et al., 2021[91]).

Improving response rates is not an easy task, and a range of factors and strategies can be considered. In terms of survey design, it is important to carefully tailor questions to the intended audience and to ensure that is "user-friendly" with an appealing appearance (Smith and Bost, 2007[92]). Survey length is also crucial. While longer surveys generally yield lower response rates, some research shows that the quality of provided answers is not affected (Deutskens et al., 2004[93]; the iConnect consortium, 2011[94]). The way in which answers are collected (by mail, electronically, by phone, in person, etc.) should also be considered in light of the target audience (Smith and Bost, 2007[92]). In the survey administration phase, it is important to clearly explain who will be able to view individual responses (in order to alleviate participants' potential concerns relating to confidentiality) and how the data will be used and how it can help communities (ibid.). For instance, as a strategy to improve response rates for Indigenous students, some schools in Nova Scotia (Canada) focused on building awareness among parents and students regarding how the

information collected in the particular surveys/data collections would be used to determine how to more effectively support Indigenous students such as through the allocation of Indigenous student support workers and recommendations targeted scholarship opportunities (OECD, 2017[95]).

Alter-identification is also a strategy that can be used where, due to the risk of stigma or discrimination (among other reasons), individuals may be reluctant to self-identify as having a particular background or belonging to a particular group. Alter-identification is where a third party estimates the size of a particular group and/or their participation in specific projects and programmes (European Social Fund Learning Network, 2018[96]). For instance, the Slovak Republic collects data on Roma communities by asking municipality representatives to estimate the share of Roma population under their jurisdiction (Ministry of Interior of the Slovak Republic, 2022[97]).

International surveys and international benchmarking

Surveys administered by international or non-governmental organisations can be useful in filling some of the gaps that exist in national data collections. For instance, OECD countries take part in PISA, where results are disaggregated by gender, immigrant and socio-economic background, to the extent sample sizes allow for it. The individual national versions of international questionnaires accompanying international large-scale assessments can also be complemented with specific items. For example, some countries complemented the PISA 2018 student questionnaire with questions about students' ethnic/Indigenous background or gender identity (OECD, n.d.[98]). To protect individuals' privacy rights, these data are neither made publicly available nor are reported in PISA international reports. They can be useful, however, in national analyses and monitoring frameworks.

Obtaining internationally comparable data is an issue for the concept of special education needs. While data collections on students with SEN are common (Figure 6.3), definitions among countries vary (Chapter 1). One of the consequences is that there is a large variance in the shares of students with SEN, from 1% in Sweden to 21% in Scotland (United Kingdom) (European Agency for Special Needs and Inclusive Education, 2022[99]). Definitional issues are also present in the concept of giftedness. Chile, the Flemish Community of Belgium, Iceland, Ireland, Scotland (United Kingdom) and Spain use the terms "ability", "high cognitive skills", "exceptionally able" and combinations or variations of these to describe giftedness (OECD, 2022[16]). Korea, Türkiye and the United States used the word "talent" or its variations (ibid.). The French Community of Belgium, Italy and Norway defined gifted students in terms of their high potential (ibid.).

One of the few sources of international (though not necessarily internationally comparable) data on SEN is the European Agency for Special Needs and Inclusive Education, which publishes information on the number of students with an "official decision of SEN" by the International Standard Classification of Education (ISCED) level as well as gender in 31 European member countries (European Agency for Special Needs and Inclusive Education, 2022[99]). In addition, the agency provides contextual country background notes. These include the basic definitions of "special education needs", educational assessment procedures, legal background and other information (European Agency for Special Needs and Inclusive Education, 2022[99]).

Information on LGBTQI+ individuals can be compiled by international non-governmental organisations. For example, at the European level, the International Lesbian, Gay, Bisexual, Transgender, Queer and Intersex Youth & Student Organisation compiles a regular report on LGBTQI+ inclusive education systems based on data collected from national civil society organisations (Box 6.5).

Box 6.5. The LGBTQI Inclusive Education Index

Based on questionnaires submitted by civil society organisations that focus on the rights of sexual minorities and gender identity issues, The International Lesbian, Gay, Bisexual, Transgender, Queer and Intersex Youth & Student Organisation created ten indicators that aim to capture the extent to which governments have implemented laws and policies that foster the inclusion of all learners in the education system.

The indicators are developed around ten areas. Within each area, several factors are "graded" usually on a scale 0 to 10 (with some going to negative values indicating a high degree of discrimination). The areas are as follows:

- **Anti-discrimination law applicable to education**: this focuses on anti-propaganda laws that might ban the display of sexual orientation, gender identity and gender expression, or variations in sex characteristics within educational settings. It also covers anti-discrimination legislation and the extent to which it covers sexual orientation, gender identity and expression and variations in sex characteristics;
- **Policies and action plans**: this assesses whether anti-bullying policy or national action plans are in place;
- **Inclusive national curricula**: this determines whether compulsory national curricula are inclusive of LGBTQI+ people;
- **Mandatory teacher training**: this indicates whether sexual orientation, gender identity and gender expression, or variations in sex characteristics are mentioned in compulsory teacher training programmes;
- **Legal gender recognition**: this assesses whether gender recognition provisions are in place;
- **National or regional data collection on bullying and harassment**: this determines whether evidence on bullying and harassment based on sexual orientation, gender identity and gender expression, or variations in sex characteristics is collected;
- **Support systems for young people**: this focuses on the existence of LGBTQI+ youth services and groups, as well as support and guidance from school staff;
- **Information and guidelines**: this asks whether policies prohibit the presence of LGBTQI+-related information;
- **School environment and inclusion**: this focuses on hostility or inclusiveness of extra-curricular activities available to LGBTQI+ students. It assesses whether LGBTQI+ students were excluded from extra-curricular activities or whether the establishment of LGBTQI+ student groups was prohibited;
- **International commitments**: this assesses whether the country is a member of the European Governmental LGBTI Focal Points Network and has signed the UNESCO Call for Action by Ministers on Inclusive and Equitable Education for All learners.

Source: IGLYO (2022[39]), LGBTQI inclusive education report, https://www.education-index.org/wp-content/uploads/2022/05/IGLYO-LGBTQI-Inclusive-Education-Report-2022-v3.pdf (accessed 23 May 2022).

The lack of recognition of some ethnic groups (e.g., Roma) as official minorities, combined with colour-blind approaches, results in scarce international data collections on ethnicity (Rutigliano, 2020[100]). Moreover, administrative categorisation of "ethnicity" often differs. Some countries refer to "ethnic minority groups" or "minority ethnic groups" others base their definitions on nationality. In the latter case, ethnicity as a concept is then often unrecognised in official statistics and policy making (Rutigliano, 2020[100]). For some ethnic

groups, such as Roma, there is a substantial heterogeneity in the definition and terminology of "Roma population", making international data collections inherently more challenging (ibid.). In regard to Roma populations, evidence is often based on international surveys, such as those conducted by the European Agency for Fundamental Rights. The 2016 European Union Minorities and Discrimination Survey collected a wide range of information on education, health, housing, labour market participation, discrimination and living conditions of the Roma population. Within education, they specifically focused on participation, segregation and educational attainment (European Union Agency for Fundamental Rights, 2018[101]).

Specific reviews on equity and inclusion

External evaluations in the areas of equity and inclusion can also come from school evaluation bodies, such as school inspectorates and independent institutions under the ministries of education. These reports often use evidence gathered from school inspection visits, data from administrative sources (e.g., national assessments) as well as international large-scale assessments. In Denmark, the *Danmarks Evalueringsinstitut* (Danish Evaluation Institute) is an independent institution the aim of which is to undertake systematic and mandatory evaluations of teaching and learning at all levels of the education system from pre-school to postgraduate level (The Standing International Conference of Inspectorates, 2021[102]). At the primary level, one of the themes they focus on is "inclusive learning environments" and several reports were published on this topic. One project includes a collection of experiences on the development of inclusive learning environments. More detailed reports by the Institute focused on the co-operation between teachers and special education teachers, and the process of collaborative teaching methods[7] (Danish Evaluation Institute, 2020[103]). Other reviews covered the inclusion of newly arrived students in the country into mainstream classes along with a detailed description of six selected municipalities and a specific review on teaching students with dyslexia (Danish Evaluation Institute, 2019[104]; Danish Evaluation Institute, 2020[105]).

In 2022, the Lithuanian *Nacionalinė švietimo agentūra* (National Education Agency) undertook a review of inclusion in and through education, analysing factors such as the representation of students with SEN in education above lower secondary level, the extent to which teachers are prepared to meet the diverse needs of students through continuous professional learning, and the participation of students with an immigrant and refugee background at various levels of education (National Education Agency, 2022[106]). The review also covered psychological well-being and labour market outcomes of young Lithuanians, as well as geographic disparities in education quality.

In the Netherlands, the *Inspectie van het Onderwijs* (Dutch Inspectorate of Education) covers the topic of inclusion in their annual education review. Progression through education of until the end of the secondary level is covered for students with SEN, with an immigrant background and for students whose parents have a lower level of education. The report also covers school changes, school segregation, school repetition and drop-out. Beyond student outcomes, the review also covers quality assurance and its contributions to inclusive education, the geographic dispersion of teacher shortages, and the general working conditions of school staff (Dutch Inspectorate of Education, 2022[107]).

Use of monitoring results

Education systems use several approaches to utilise and publish the results of their data collections. As elaborated in the previous sections, these include the production of an annual statistical report, a governmental report on the state of education, reports by specific evaluation agencies, summary reports on results from national assessments, national audit reports on the education sector or part of it, and various reports by sub-national educational jurisdictions (OECD, 2013[1]). Countries often use a combination of the formats that vary in design and content significantly (ibid.).

Apart from products delivered in written formats, education systems heighten the accessibility and use of education evaluation results by publishing them in the form of databases and dashboards for a wide range

of stakeholders, including the general public. In the United States, for instance, data from the National Assessment of Educational Progress are summarised in dashboards that disaggregate data, including student learning outcomes, by geographic location, gender, ethnic background and socio-economic background (e.g., parental education level and National School Lunch programme eligibility) (The Nation's Report Card, 2022[108]). The Czech School Inspectorate designed a dashboard that portrays various indicators in a map, such as the number of students by various typologies of SEN (Czech School Inspectorate, 2022[109]). Data can also be visualised by non-public organisations. Prokop Analysis and Quantitative Research (PAQ Research) in the Czech Republic, for example, uses mapping tools to illustrate a wide range of indicators that can cause educational inequities at the regional level, including the number of children in housing needs, the number of children in inadequate of overcrowded dwellings, resourcing per student, early school leaving indicators, grade repetition and many others (PAQ Research, 2022[110]). Data can also be downloaded in user-editable formats for further analyses.

Strengthening the channels between monitoring systems and practices

A considerable challenge for policy makers is to use the full potential of the instruments used to measure progress towards equity and inclusion to inform policy development. However, a systematic review of Roma-inclusion measures in the fields of education, employment, healthcare, housing and non-discrimination/fighting antigypsyism[8] revealed that the results of monitoring and evaluation reports are often not considered due to the lack of co-operation between stakeholders (Fresno et al., 2019[111]). This includes a lack of co-ordination between administrators of the intervention and local authorities, a lack of close co-operation with key stakeholders and the lack of a common understanding of the main goals in the case of several institutions coordinating one project. Furthermore, there is often a disconnect between research and the policy-making process. An obvious, yet often overlooked point is that researchers need to communicate their findings to policy makers in a clear language that can be easily understood by non-specialists (Oliver and Cairney, 2019[112]). Thus, ensuring co-operation between different actors is key in ensuring that the information obtained through monitoring is used to inform policy development.

Some organisations have reflected on these issues and are attempting to make research more accessible to schools. The Education Endowment Foundation/Sutton Trust, for instance, set up the “Research Schools Network”. Schools that are members of the network can benefit from continuous professional learning for teachers and school leaders on how to improve classroom practices based on evidence. Some initiatives that were explored include the support of students with SEN during testing times, the reintegration of disengaged learners, and strategies to reduce the impact of school closures on disadvantaged students during the COVID-19 pandemic (Research Schools Network, 2020[113]; Research Schools Network, 2020[114]; Research Schools Network, 2022[115]).

Co-operation is also important within the public sector, where responsibilities are often strictly divided between ministries and departments. Many issues will necessarily concern multiple agencies and departments and co-operation is important to ensure the development and implementation of an effective monitoring and evaluation framework. Refugee integration in education, for example, often requires co-ordination with the departments responsible for housing, employment and health. In France, all relevant ministries meet every six months to review the implementation of the National Strategy for Refugee Reception and Integration. Moreover, all relevant stakeholders in refugee integration, including local actors, are involved in the interpretation and monitoring of the evidence, and review of the implementation of the strategy at an annual conference organised by the inter-ministerial delegation for the reception and integration of refugees (Siarova and van der Graaf, 2022[84]). The French Council for School Evaluation is another example where stakeholders from different sectors meet to discuss evidence focused around school evaluation while also focusing on equity in education (Box 6.6).

Box 6.6. The French Council for School Evaluation

The main missions of the independent French Council for School Evaluation are to ensure consistency in the evaluation of public education policies; comment on methodologies, tools and results of school assessments; define and comment on tools for school self-assessments, and synthesise research on students' educational achievement.

There are 13 members in the Council, four of whom are members of the parliament, three are senior officials from the Ministry of Education and six are various education experts working under the supervision of the Council's president.

To provide advice on removing inequalities in academic success (whether based on socio-economic status, geographic location or gender), the Council formed a committee that builds an inventory of studies about evaluation techniques on equity and equality in student assessments. The aim of the committee is to develop a targeted evaluation plan in this area, and ultimately implement student assessments that respect the principles of equity and that are adapted to inclusive education (The French Council for School Evaluation, 2021[116]).

Source: Ministry of National Education and Youth (2022[117]), Conseil d'évaluation de l'École [The French Council for School Evaluation], https://www.education.gouv.fr/conseil-d-evaluation-de-l-ecole-305080 (accessed 23 May 2022).

Monitoring systems are also used to provide useful information for the management of local authorities and schools. However, while schools are the primary units that send data to national (or sub-national) authorities, they do not always receive a statistical analysis of their profile to support them in their internal analysis and further planning. One way in which national (or sub-national) authorities can support schools is to compare their data with central-level indicators or with other relevant benchmark groupings (e.g., comparing the outputs with schools with similar inputs), or by providing them with frameworks and guidelines for internal school evaluation. These practices are further elaborated in the section on Supporting schools in improving equity and inclusion practices through evaluation processes.

Evaluating policies, programmes and processes to improve equity and inclusion in education

In line with other OECD definitions, evaluation refers to the structured assessment of policies or programmes to reliably determine their merit and value according to the specific criteria (Golden, 2020[118]). Evaluation can inform policy development, curriculum, planning, reporting, resource allocation decisions and performance management and, in the context of limited resources, can be crucial in ensuring the highest value for money (Cerna et al., 2021[2]).

Evaluation frameworks of policies and programmes in the area of equity and inclusion are shaped by the broader context of education policies as well as existing traditions, values and cultures. While the need for evaluation in the education sector is widely acknowledged, traditions and cultures in education shape the nature and significance of evaluation and assessment activities (OECD, 2013[1]; OECD, 2022[119]). As such, there are no common definitions and concepts of policy evaluation and practices across OECD countries vary (Golden, 2020[118]).

Education system evaluation can be implemented with the aims of accountability, development or diagnosis (OECD, 2013[1]). Accountability relates to measuring student or school outcomes in order to identify underperforming actors in the system. The consequences can then take the form of rewards or sanctions, such as career advancement or salary progression of school staff. Development relates to

identifying the strengths and weaknesses of the system or individual schools. Finally, diagnosis aims to measure the extent to which school outcomes are aligned with objectives.

This section mostly focuses on the development aim of evaluation. Furthermore, while evaluation can also take the form of assessments (such as examinations; see Chapter 5) and appraisals (e.g., judging the performance of teachers), this chapter focuses on judgements of the effectiveness of schools, programmes and policies, with a particular emphasis on equity and inclusion.

Challenges in evaluating equity and inclusion

Despite the fact that the evaluation of policies was among the identified priority areas of many education systems between 2008 and 2019, OECD reviews have continued to identify a possible absence or underdevelopment of system evaluation components, insufficient clarity in evaluation processes, possible gaps in data collections that could inform improvement and issues with quality (OECD, 2019[46]). Across OECD countries, only about one in ten education reforms is followed by any attempt to evaluate its impact (OECD, 2015[120]). Evaluations in the area of equity and inclusion are also rare. Researchers have identified a lack of programme evaluations for LGBTQI+ students, gifted students, and ethnic minorities and Indigenous populations (McBrien, Rutigliano and Sticca, 2022[17]; Rutigliano, 2020[100]; Rutigliano, 2020[100]). This section discusses the different challenges in developing and implementing effective evaluation systems for equity and inclusion in education.

Evaluations for equity and inclusion are often not effectively resourced. The process of evaluation can be resource intensive and often requires specialised tools, skill sets and the involvement of third-party institutions (e.g., from the academic sector). Despite growing investment, funding for education research remains lower than in other comparable sectors (OECD, 2022[119]), also affecting evaluations in the areas of equity and inclusion. Choosing the appropriate methodologies and metrics for evaluation can also be a resource-intensive task. This is particularly true if causal impacts are to be estimated; and incorrect causal conclusions can have significant costs for education systems (Cook, 2002[121]). Indeed, the identification of the quality of research is a recurring theme in education research. For instance, definitions and standards of what merits a high-quality research are often left undefined (OECD, 2022[119]). Consequently, evaluations are often left without causal interpretations or are limited to descriptive analyses (to the extent such analyses can still be considered “evaluations”).

In the area of inclusion of European Roma minorities, Fresno et al. (2019[111]) analysed more than 60 reports in monitoring, assessment and evaluation of programmes in the areas of education, employment, discrimination and others. The authors concluded that evaluations using robust evaluation methods are scarce. While many studies described the socio-economic situation of Roma groups, only a few looked at the effectiveness of measures attempting to alleviate the effect of socio-economic background on outcomes (Rutigliano, 2020[100]).

Similarly, the general lack of data as well as resources results in a low number of policy and programme evaluations related to Indigenous populations. Even when evaluations are conducted, they are often qualitative in nature and small in scale. Furthermore, they often cover communities in specific educational contexts, making generalisations challenging (OECD, 2017[95]).

Evaluations require a commitment to continue in the evaluation process over a longer period of time (Golden, 2020[118]). However, evaluations are often limited in terms in their time scale. For instance, in the area of giftedness, assessment within the field is often related to identification challenges. However, once students are identified as gifted, their progress in education is rarely evaluated over the long-run (Parekh, Brown and Robson, 2018[122]). This prevents a proper evaluation of programmes and policies addressing the needs of gifted students. Thus, in many countries, an additional challenge to adequately identify students’ needs lies in a continuous assessment of their progress.

Socio-political considerations can undermine the evaluation process or even discourage evaluations from taking place (Golden, 2020[118]). Some evaluations can be hampered by a lack of political will, while others might be published during an inconvenient time in the political cycle (Bamber and Anderson, 2012[123]). Fears of policy failure can result in evaluations not taking place at all. Furthermore, given that evaluations can span across political cycles, an incumbent government might not always feel enthusiastic in acknowledging positive evaluation results for a policy introduced and undertaken by a different administration (Golden, 2020[118]).

Moreover, evaluations are often absent for dimensions of sexual orientation and gender identity (McBrien, Rutigliano and Sticca, 2022[17]). A possible reason might be that many initiatives are relatively new and thus cannot be evaluated yet. However, the topic of LGBTQI+ is also considered controversial in public debates in some regions, and initiatives that support LGBTQI+ students are at times contended (McBrien, Rutigliano and Sticca, 2022[17]).

Finally, evaluation results do not always permeate to local and classroom level. Research has identified that a lack of co-operation can result in a barrier between researchers and school staff hindering the process of monitoring and evaluation (Fresno et al., 2019[111]; OECD, 2022[119]). This disconnect between research and schools can have many negative consequences. In regards to students with ADHD, for instance, evidence shows that giving additional time during exams is a widely adopted practice, yet with little support in the academic literature. In contrast, peer-to-peer learning, which has been found effective in terms of improving student well-being outcomes, is less frequently applied (Mezzanotte, 2020[19]).

Enabling factors for evaluation in the area of equity and inclusion

Each education system is unique and shaped by the broader context of education policies as well as existing traditions, values and cultures. This means that there is no one-size-fits-all approach in terms of ensuring the implementation of effective evaluation policies, with the complexities inherent in different education systems requiring consideration of a variety of methods and strategies (Golden, 2020[118]). Despite this, several factors that can help to facilitate the implementation of evaluation policies can be identified. These are discussed below.

Evaluations cannot happen without developing a shared mind-set of evaluative thinking. This means emphasising and valuing a deep and critical enquiry process, question assumptions and the status quo and view mistakes as necessary in the learning process (Golden, 2020[118]). In the area of inclusion this can also entail addressing concerns regarding inclusive practices at all levels of the education system (AuCoin, Porter and Baker-Korotkov, 2020[124]). To address these concerns, stakeholders might need to reflect on public priorities, renew a shared vision, bring diverse perspectives and experiences to the process, and ultimately fundamentally change the attitudes about diversity, equity and inclusion at all levels of society (ibid.). This was the approach taken in several evaluation rounds of the inclusive system in New Brunswick (Canada) (Box 6.7).

Box 6.7. Inclusive reforms in New Brunswick (Canada)

Bill 85, enacted in 1986, gave public schools a mandate to include all students within the education system of New Brunswick (Canada). After two decades, a review of the policy highlighted several challenges, such as the need for clarity in the policies and particularly the need to develop a consensus on the definition of inclusion. As a result, the government adopted a clear definition of inclusive education along with several related terms. Among others, the common learning environment concept was defined which broadened the definition of inclusive education to all students, not just selected groups, e.g., those with SEN.

In 2012, the government mandated another review that focused on approaches at the district, school

and classroom level to better support learners. As a result, Policy 322 was developed to provide guidance and clarity on programmes and procedures to every public school in the province. Given New Brunswick's dedication to inclusive reforms, the province was awarded the UNESCO/Emir Jaber al-Ahmad al-Jaber al-Sabah Prize for "long-standing commitment to a systemic approach to inclusive education for learners with disabilities and for its vision of education as a catalyst for social justice and equity" (UNESCO, 2014[125]).

The evaluations were framed by bringing diverse perspectives and experiences to the process. Apart from deputy ministers, school district officials and parent advocacy groups, they also included school leaders and teachers, and eventually also university faculty and teacher professional associations. The opportunities to engage in the process resulted in a greater commitment on the side of school leaders and teachers, and their subsequent investments into continuous professional learning in the area of inclusion.

Source: AuCoin, Porter and Baker-Korotkov (2020[124]), New Brunswick's journey to inclusive education, 10.1007/s11125-020-09508-8.

Evaluations will not happen without consensus-building through a consultative and co-operative process. Significant divergences and views and interests exist within various stakeholder groups and policy makers need to reconcile these to avoid the perception that evaluation and assessment policy is imposed to other groups in a top-down fashion (OECD, 2013[1]). These collaborative efforts can include expert groups, committees, taskforces or communal efforts by different evaluators (Golden, 2020[118]). Collaborative approaches to evaluation can also promote learning and knowledge transfer between national (or sub-national) authorities and local and regional authorities. For instance, in 2011, Canada upgraded its gender-based analysis and created the Gender-Based Analysis Plus approach (GBA+) (Government of Canada, 2022[126]). This approach is an *ex ante* evaluation budgeting process based on the premise that policy making should consider gender as well as other dimensions of diversity and the interactions between them. To spread the use of the GBA+ approach to all provinces and territories of Canada, the Government engaged sub-national entities in a co-operative process by developing GBA+ awareness weeks. During these events, the participants explore the changing realities and inequalities of diverse groups, and examine how the GBA+ approach can be used to create effective policies, programs and services (Government of Canada, 2022[126]). As a result, various Canadian provinces have already embraced this process (Hankivsky and Mussell, 2018[127]).

The process of evaluation can be streamlined by involving internal administrative and analytical capacities. Many central authorities already have internal monitoring and/or evaluation units, although they often operate in silos (e.g., education management and information systems operate independently of policy analysis units) (Golden, 2020[118]). In the Czech Republic, the inspectorate was involved in two evaluations of the inclusive school reform (Box 6.8).

Box 6.8 Evaluation of inclusive reforms in the Czech Republic

As of 2016/17, the Czech school system assumes that all students are educated in the mainstream school setting (including students with SEN and gifted students). Education in special school/class settings is allowed only in exceptional circumstances when supporting mechanisms are not sufficient. Students are entitled to appropriate supporting mechanisms that address their special needs (understood broadly and include education needs as well as needs resulting from disadvantaged socio-economic, cultural or immigrant background). Supporting mechanisms have different stages (and costs attached to them) and are assigned at the discretion of teachers, schools or special education centres. The Czech School Inspectorate evaluated this policy change at the end of 2016/17 and 2017/18 in the

form of several hundreds of school visits.

The 2016/17 evaluation found that schools were often using individualised teaching methods, co-operation between teachers and teaching assistants had improved, school activities were accessible to all students and after-school activities had also benefited from supporting mechanisms. On the other hand, some schools observed an increased administrative burden. Furthermore, many schools were using supporting mechanisms inefficiently (e.g., buying new school resources even though old ones could have been reused), although the 2017/18 evaluation no longer identified this as a challenge. Few teachers attended continuous professional learning related to the policy change and schools often struggled to find qualified non-instructional staff. In 2017/18, an additional challenge presented the involvement of teacher assistants in the process of teaching. For instance, some school visits revealed that the teaching assistant focused on one particular student and the teacher on the rest of the class, with the effect that the student in question was therefore not fully and equally included in the teaching process.

Source: Czech School Inspectorate (2017[128]), Společné vzdělávání ve školním roce 2016/2017 [Common education in 2016/2017 school year], https://www.csicr.cz/getattachment/7734c437-a133-4411-b8b6-ed11776ad4fe/TZ-Spolecne-vzdelavani-16-10-2017.pdf (accessed 20 May 2022) and Czech School Inspectorate (2018[129]), Vybrané aspekty implementace společného vzdělávání v období 1. pololetí školního roku 2017/2018 [Selected aspects of the implementation of common education in the first half of 2017/2018], https://www.csicr.cz/CSICR/media/Prilohy/2018_p%c5%99%c3%adlohy/Dokumenty/TZ-Vybrane-aspekty-implementace-spolecneho-vzdelavani-v-1-pololeti-2017-2018.pdf (accessed 20 May 2022).

The clarity of purpose of the evaluation and the clear communication of objectives are also key factors that researchers have identified for the development and implementation of effective evaluations (OECD, 2013[1]). A comprehensive evaluation framework and clear guidelines can play a valuable role in this respect (Golden, 2020[118]). Gender policy is an area with many guidelines and frameworks. In fact, the research in the area has permeated into policy making and *ex ante* gender impact evaluations are now sometimes conducted. These aim to ensure that during the policy-making process, disadvantages specific to women, and more recently also non-binary individuals in some jurisdictions (such as in Victoria (Australia)), are not overlooked (European Institute for Gender Equality, 2016[130]; Federal Minister for Women and Civil Service at the Federal Chancellery, 2012[131]; Victoria State Government, n.d.[132]). The development of toolkits for policy makers to conduct gender impact evaluations can help to clarify the purpose and the development of evaluations. The European Institute for Gender Equality, for instance, provides a framework for gender impact assessments (Box 6.9). As a result, gender impact evaluations are not uncommon and interventions have been evaluated in terms of boys' engagement with school (Glass, 2013[133]), impact on students' literacy skills by male as well as female role models (Marx and Roman, 2002[134]; Wood et al., 2016[135]) and others. In some countries, such as Austria, impact assessment on gender equality are even required by law (Federal Minister for Women and Civil Service at the Federal Chancellery, 2012[131]).

Box 6.9. Gender Impact Evaluations: Gender Mainstreaming Toolkit

The European Institute for Gender Equality structures gender impact assessments into five steps grouped in three stages:

- **Gender relevance assessment**: In the first two steps (definition of the policy purpose, checking gender relevance), the aim is to describe the purpose of a policy, law or programme and assess its impact, both direct and indirect, on gender equality;
- **Gender impact assessment**: In the subsequent two steps (gender-sensitive analysis, weighing gender impact), the gender impact analysis is carried out. Such analysis is necessary for the

stakeholders to understand the current situation and how it could evolve without public intervention. Moreover, the analysis should be able to evaluate how the intervention might change the existing situation and how it will impact gender equality and gender relations; and

- **Gender quality assessments**: The last step (findings and proposals for improvement) consists of the formulation of conclusions in terms of the impacts on targeted women and men. Proposals promoting gender equality should be put forward.

Finally, to provide quality assurance to the whole process, it is also recommended to follow up on the gender impact assessment and thus identify potential adjustments needed in policy or law. The Gender Mainstreaming Toolkit is available on the website of the European Institute for Gender Equality in an interactive form so that various stakeholders can integrate it in their frameworks.

Source: European Institute for Gender Equality (2016[130]), Gender Impact Assessment: Gender Mainstreaming Toolkit, https://eige.europa.eu/publications/gender-impact-assessment-gender-mainstreaming-toolkit (accessed 10 May 2022).

Gender impact assessments are also conducted at the regional level. The Swedish Association of Local Authorities and Regions created a set of checklists and guidelines to systematise the decision-making process at the local level and thus clarify the purpose of gender impact assessments (European Institute for Gender Equality, 2016[130]). The aim of these resources is to highlight any possible data gaps, analyse the consequences of the proposed policy for men and women, and describe how the proposed changes lead towards gender equality goals.

Upscaling and institutionalisation following evaluations that improve equity and inclusion

Upscaling or institutionalisation can be viewed as results of an evaluation. Upscaling can be defined as the process of expanding the effects of a practice not only to a larger group of beneficiaries, but also to achieve longer-term changes in practice and belief (depth), continuation of intervention effects after initial implementation (sustainability), and strong ownership of the reform (Coburn, 2003[136]). Upscaling can result in institutionalisation, i.e., the process through which new practices or innovations are integrated into the context of focus and become prevailing practices in an organisation, system or society (Nworie, 2015[137]).

The challenges that prevent the upscaling and institutionalisation of programmes or policies are similar to those of evaluations itself. There is often a lack of resources for the process of upscaling and institutionalisation, such as money, tools, materials and time commitment (Ely, 1999[138]; Koehler, Palaiologou and Brussino, 2022[139]). The broader communities are often not prepared for the scaled implementation of the practice, or lack a shared understanding of the benefits of the programme (de Hoop et al., 2019[140]; Seelos and Mair, 2016[141]). The process often lacks leaders who are equipped with the skills needed to support the upscaling process, and who understand both the local context of the programme as well as broader societal factors that can hinder upscaling (Seelos and Mair, 2016[141]). The process often lacks iteration, i.e., it does not foster a continuous re-examination and evaluation of the interventions before they scaled up (Glennan et al., 2004[142]). Finally, political support is often lacking in the process of institutionalisation (Koehler, Palaiologou and Brussino, 2022[139]).

Despite these challenges, smaller programmes have become more widespread following evaluations, and have led to improved learning and well-being outcomes for diverse students. The Tutoring Online Programme in the city of Milan (Italy), for instance, provided online tutoring by trained volunteers from higher education institutions for lower secondary students (Carlana and La Ferrara, 2022[143]). Students participating in the programme were lagging behind their peers during distance learning as a result of school closures during the COVID-19 pandemic. A large proportion of participating students were

socio-economically disadvantaged, with language barriers, an immigrant background or SEN. The results of the evaluation showed positive effects on learning outcomes as well as student effort, attendance and behaviour. In terms of non-academic outcomes, the evaluation revealed positive effects on students' beliefs in their ability to control the outcome of events in their lives and psychological well-being. Some of these effects were even more pronounced for disadvantaged students, students with an immigrant background or students with learning disabilities. Given the generally positive results, the programme was scaled up to 3 000 students in 2021/22 as part of a wider co-operation with the Italian Ministry of Education.

Successful scaled-up practices can also be found in the area of teacher co-operation and knowledge-sharing. In New Zealand, the Learning and Change Networks initially started as voluntary local networks between schools to boost student achievement, including that of Indigenous students. Teachers came together to analyse data, share classroom practices and students' views on their learning. The successful feedback on this initiative led the government to scale up the practice to a country-wide initiative, Communities of Learning, to incentivise more schools for such knowledge sharing (OECD, 2017[95]).

The *Schlauschule* in Bavaria (Germany) is an example of a programme that started locally and eventually became institutionalised at the federal level. The programme targets refugee students between the ages of 16 and 21, including unaccompanied minors (Koehler, Palaiologou and Brussino, 2022[139]). Each school year, about 300 students are taught in 20 classes. An individualised approach is promoted with the ultimate goal of students becoming more familiar with the Bavarian schooling system and transitioning to the mainstream track. Depending on prior education and learning needs, students spend one to four years in a *Schlauschule*. Besides academic competencies, the programme aims to develop general knowledge and key competences, such as solidarity and equal treatment independent of gender, origin, age and socio-economic status. It started as a small-scale programme responding to the need for education of asylum-seekers in Bavaria. Initially, the programme educated only 20 unaccompanied minors. In 2004, it was approved as a vocational preparation school for refugees by the Bavarian Ministry for Education. This fostered partnerships with new schools and a wider participation of refugees in the programme. Once Germany ratified the UN Declaration of the Rights of the Child in 2010, the programme inspired the Federal State of Bavaria to introduce the *Berufsvorbereitungsklassen* (vocational preparation classes) that follow the example of *Schlauschule*.

Supporting schools in improving equity and inclusion practices through evaluation processes

Interventions to support equity and the inclusion of students are not only managed at the national level, but also at a local and school level. Individual school evaluations can be an important tool that assists with decision making, resource allocation and school improvement. The effective monitoring and evaluation of schools, including the aspects of equity and inclusion, are central to their improvement. Schools need feedback on their practices to identify areas for improvement.

The way in which school evaluations are designed and implemented can have important impacts on efforts to improve equity and inclusion (Cerna et al., 2021[2]). On the one hand, effective systems need to be in place to ensure that local actions are being taken and that they are in line with national requirements (OECD, 2022[21]). On the other hand, disproportionate blame for systemic educational problems on any actor can have serious negative side effects, widening inequality and damaging learning (UNESCO, 2017[144]).

The evaluation at the school level can happen externally (e.g., by school inspectorates) and internally (self-evaluations). In 2018, internal as well as external evaluations were common across OECD countries. More than 94% and 76% of 15-year-old students attended schools whose leaders reported the existence of internal and external evaluations respectively in their schools (OECD, 2020[8]). Individual country

practices, however, vary and there is no "one-size-fits-all" approach that would be applicable to all education systems.

Equity and inclusion in external evaluation processes

The nature of feedback delivered by the evaluation bodies differs across education systems. In some education systems, development processes are encouraged through indirect feedback. In other systems, the evaluation focuses more on whether schools have met pre-defined criteria (Ehren, Perryman and Shackleton, 2014[145]). Education systems can also focus specifically on the topics of equity and inclusion in their policy frameworks for school evaluations. In 2022, 11 out of 34 OECD education systems provided criteria for an assessment of equity and inclusion in their policy frameworks for school evaluation (the Flemish Community of Belgium, France, Iceland, Ireland, Italy, Latvia, Lithuania, New Zealand, Portugal, Spain and Türkiye) (OECD, 2022[16]).

A number of factors can support school evaluation processes in promoting equity and inclusion. First, clear reference standards can be defined with a particular focus on equity and inclusion (Cerna et al., 2021[2]; OECD, 2015[120]). These can be developed in national quality standards that define the characteristics of quality in terms of equity and inclusion in addition to other domains (OECD, 2015[120]). In North Rhine-Westphalia (Germany), for example, addressing student diversity is incorporated within the four domains of the region's quality standards (teaching and learning, school culture, continuous professional learning, and leadership and management) (Ministry for Schools and Education of the North Rhine-Westphalia, 2022[146]). For instance, one indicator focuses on whether diversity is respected and taken into account in schools. Reference standards can also draw from equity and inclusion policies that are currently in place. In Scotland (United Kingdom), for instance, school evaluation guidelines draw on principles and values of the "Getting it right for every child" policy (Education Scotland, 2015[147]). These principles and values place each student at the heart of the learning process, appreciate differences among students, and consider and address inequalities (Scottish Government, n.d.[148]).

Second, benchmark information on key indicators related to equity and inclusion can be offered so that schools can adequately compare themselves to broader averages (Cerna et al., 2021[2]; OECD, 2015[120]). In Portugal, for example, the Equity Indicator measures disadvantaged students' completion of each school cycle in the expected time and with positive scores in national examinations. Each school cluster and municipality can compare their index score with the national average. The values are also used during visits by the school inspectorate (OECD, 2022[21]).

The third important aspect is the training of external evaluators in the area of equity and inclusion so that they can adequately assess a school's performance and potentially offer assistance for improvement (Cerna et al., 2021[2]; OECD, 2015[120]). Through this process and their experience, evaluators can share good school-level practices that are in line with national educational priorities from other schools they have evaluated. Ensuring that the external school evaluators have in-depth expertise in education and teaching so as to be able to guide and support others in the process of school development is also highly important from a legitimacy perspective, which is crucial for the school evaluation process to be effective (OECD, 2013[1]). In Austria, following the 2017 education reform, school quality managers are responsible for external school evaluation (Federal Ministry of Education, Science and Research, 2022[149]). Their roles vary from the implementation of reforms and development targets, through control of regional educational planning, to provision of pedagogical expertise in areas relevant to equity and inclusion (e.g., diversity-oriented pedagogies, co-operation between teachers and support staff) (Federal Ministry of Education, Science and Research, 2022[150]). The Federal Ministry of Education, Science and Research organises training events, specialised courses for school quality managers and an annual school supervisory congress to deepen and expand school quality managers' professional skills (Federal Ministry of Education, Science and Research, 2022[149]).

Lastly, school evaluation needs a clear purpose and to provide clear guidance on how school processes can be improved in terms of equity and inclusion (Cerna et al., 2021[2]; OECD, 2015[120]). To this end, some education systems have created clear guidelines on what is evaluated in terms of equity and inclusion. The aim of these guidelines is to provide a common base for the evaluation and draw attention to the aspects that are important. In Scotland (United Kingdom), these are summarised in the form of several quality indicators and complemented with features of highly effective practices (Box 6.10).

Box 6.10. Evaluation framework in Scotland (United Kingdom)

In Scotland (United Kingdom), the framework for school evaluation is published by Education Scotland, the institution responsible for external school evaluation. The guidelines, questions and indicators outlined in this framework are also used by school inspectors during school visits. The framework is structured around 15 quality indicators within three categories. For each indicator, the framework outlines features of highly effective practices and questions that can guide schools towards improvement.

Leadership and management

This area covers the school leadership and schools' approach to improvement. The indicators include the topics of self-evaluation for self-improvement, leadership of learning, leadership of change, leadership and management of staff, and management of resources to promote equity.

Learning provision

This area covers the quality of care and education. The indicators include the topics of safe-guarding and child protection; curriculum; learning, teaching and assessment; personalised support; family learning; transition; and partnerships.

Successes and improvements

This area covers whether schools are best placed to ensure the best possible outcomes for all learners. The indicators include the topics of well-being, equality and inclusion; raising attainment and achievement; and increasing creativity and employability.

Source: Education Scotland (2015[147]), How good is our school?, https://education.gov.scot/improvement/Documents/Frameworks_SelfEvaluation/FRWK2_NIHeditHGIOS/FRWK2_HGIOS4.pdf (accessed 11 August 2022).

Equity and inclusion in internal evaluation processes

School self-evaluation is a long-established process in OECD education systems. In some, the practice is required by law, while in other countries it is recommended or required only indirectly (e.g., by developing school guidelines) (European Commission/EACEA/Eurydice, 2015[151]; OECD, 2015[120]). Some education systems focus specifically on the topics of equity and inclusion aspects in their policy frameworks for internal evaluations. In 2022, 19 out of 34 OECD education systems provided guidelines for an assessment of equity and inclusion in frameworks for school self-evaluation (Australia, Canada, Colombia, the Flemish Community of Belgium, France, Greece, Iceland, Ireland, Italy, Latvia, Lithuania, New Zealand, Northern Ireland (United Kingdom), Norway, Portugal, Scotland (United Kingdom), Slovenia, Spain and Sweden) (OECD, 2022[16]).

By encouraging school self-evaluations, governments highlight that schools are best placed to analyse their own strengths and weaknesses and identify the main areas for improvement (OECD, 2015[120]). The

objective of a school self-evaluation is in essence similar to that of an external evaluation: to assess the effectiveness of structures and processes, including teaching and community engagement, and ultimately improve the quality of instruction and thereby student achievement (OECD, 2015[120]; OECD, 2015[52]). However, internal evaluation can lead to increased reflection on school quality and intentions to improve, a greater ownership of change, and a greater sensitivity to areas in need of improvement (Godfrey, 2020[152]). It can also help with the identification of continuous professional learning needs for teachers and the subsequent increased use of professional learning.

In the context of equity and inclusion, internal evaluation can lead to revisions in the content or organisation of the curriculum, and the provision of targeted support for groups of students. Self-evaluation can also serve to identify barriers that hinder inclusive education for all students. This can be done by analysing school climate, relationships, learning support, barriers to continuous professional learning and other aspects of the school environment. A useful framework that can guide schools in self-evaluating in this area is the Index for Inclusion (Box 6.11). The Index can also help school leaders to conduct self-evaluations that have a real and lasting impact on school processes – a common challenge for self-evaluations identified in the literature (Nelson, Ehren and Godfrey, 2015[153]; OECD, 2013[1]).

Box 6.11. Index for Inclusion

The Index for Inclusion is a self-evaluation tool for schools to help them identify barriers to and subsequently develop an inclusive school setting. It has been adopted and modified in several countries, and translated into 35 languages (Centre for Studies on Inclusive Education, 2020[154]). The resource is comprised of a set of questions and a comprehensive document that defines the terminology (e.g., inclusion in education) and explains the main concepts. One key characteristic of the Index is that it does not focus on a particular group of students (e.g., those with SEN), but focuses on all students. The Index is structured around three main dimensions of school improvement: creating inclusive cultures, producing inclusive policies and evolving inclusive practices (Figure 6.8). All dimensions are necessary to the development of inclusion at schools. Each dimension is divided into two sections to focus attention on what needs to be done to increase learning and participation in school. Each section contains several statements that schools can self-assess.

Figure 6.8. Dimensions of the Index for Inclusion



Creating inclusive cultures

Building a community indicators focus on co-operation between stakeholders, i.e. between students, between teachers, between students and teachers, between staff and parents, between schools and wider communities, and between schools and other governing structures. Indicators on **establishing inclusive values** then evaluate whether staff and students feel valued, how they treat each other and how the challenges of participation and discrimination are addressed. The principles and values of inclusive school settings should guide day-to-day decisions and should be continuously developed.

Producing inclusive policies

Developing the school for all assesses whether inclusive policies are in place for staff recruitment and student admission. This domain also includes indicators on how newcomers are helped and welcomed in a school and whether all new members are valued. **Organising support for diversity** is concerned with whether there is co-ordination between various stakeholders in school to support the needs of all students, and whether policies designed to promote inclusion take a broad approach or rather target only specific student groups, such as those with SEN. The domain also addresses barriers to attendance and bullying.

Evolving inclusive practices

The **orchestrating learning** domain is concerned with classroom practices, whether they encourage the participation of all students, embrace diversity, co-operation and mutual respect. It also focuses on participation in out-of-school activities, homework and co-operation between teachers to plan lessons. **Mobilising resources** addresses whether students support each other, whether staff share knowledge, advice and practices for the benefit of all students, and whether all school resources are utilised effectively. It also includes indicators on community engagement and distribution of school resources.

Source: Booth and Ainscow (2002[155]), The Index for Inclusion: developing learning and participation in schools, https://www.eenet.org.uk/resources/docs/Index%20English.pdf (accessed 11 April 2022).

Clear reference standards approved by the national authority, which focus on equity and inclusion, are often developed to help schools self-evaluate (Cerna et al., 2021[2]; OECD, 2015[120]). For example, the "Every School a Good School" policy developed by the Department of Education in Northern Ireland (United Kingdom) sets out a series of principles and values that should guide school improvement processes, in line with the overarching vision of ensuring "that every learner fulfils his or her full potential at each stage of his or her development" (Department of Education, 2009[156]). The policy also outlines the roles and responsibilities of different actors in school improvement and specific targets for monitoring and evaluating progress (some of which focus on equity and inclusion).

Some education systems provide schools with self-evaluation guidelines. Guidelines for effective self-evaluation can make the process easier for school staff, who often lack the capacity and time to engage in self-evaluation (Nelson, Ehren and Godfrey, 2015[153]). Time is also needed for collaborative discussions that are important in articulating the goals and questions (ibid.). In Norway, the Ministry of Education provides tools to support schools in conducting voluntary self-evaluation. The goal is to promote common reflections on school practice and help schools prioritise areas for further development, including in the area of inclusion (Directorate of Education, 2022[157]). Similarly, the Irish Inspectorate publishes school self-evaluation guidelines (Department of Education and Skills, 2016[158]). The guidelines outline a step-by-step approach for initiating the self-evaluation process, provide a set of standards that can assist schools in making judgements about the quality of teaching and learning, describe a range of evaluation approaches, provide guidance about recording the self-evaluation process, and outline a framework with domains and standards to enable schools to evaluate teaching and learning. Standards in the "leading learning and teaching" domain include whether school leaders foster a commitment to inclusion, equality of opportunity and the holistic development of each student.

Tools to support schools' evaluation can also be provided by other public bodies. Statistics Norway, for instance, is responsible for publishing value-added indicators for schools (Statistics Norway, 2017[159]). Compared to more traditional measures of equity that disaggregate outcomes by student characteristics, value-added indicators attempt to consider the composition and level of skills of students when they started their study at a particular school. By comparing each school's actual results with expected results based on the level of skills and characteristics of the student intake, they can determine whether the school exceeded the expectations, performed *at par* with expectations or underperformed. This provides schools with an indication on the extent to which they are supporting students' learning.

Improving equity and inclusion as a result of school evaluation

Whether school evaluation leads to improved progress towards equity and inclusion depends on numerous factors. It is important to consider that school evaluation impacts each school differently and various conditions determine whether and to what extent schools accept and act on the results from the analyses (OECD, 2013[1]).

Finding a common language can help translate evaluations into improved processes

The extent to which feedback obtained through the process of evaluation is actually implemented is a widely debated question. Due to resistance from schools, lack of capacity or lack of communication on the part of the evaluators, school evaluation often does not motivate schools to improve (Ehren et al., 2013[160]). Internal evaluations often suffer from poor quality and sometimes fail to answer the questions that were set at the beginning of the evaluation process (Nelson, Ehren and Godfrey, 2015[153]).

One important enabling factor to help ensure that evaluation leads to school improvement is the alignment of views and beliefs on what constitutes a "good education", and finding a common language between the evaluators and schools (Ehren et al., 2013[160]). Within schools, it is important that any differences in the meanings of inclusion are resolved and school staff arrive at a shared understanding that draws them around a common purpose (Azorín and Ainscow, 2018[161]). Shared understanding of the goals of an evaluation can foster evaluative thinking, reasoning and decision making within schools, and focus attention on the aspects relevant to equity and inclusion, such as outcomes for diverse students, school conditions that promote equity, and relationships with diverse communities. Building a common language between evaluators and schools is not an easy task. One approach is to work with schools in a cyclical process of evaluations and conversations that emphasise schools' priorities and the specific needs of individual school communities (Box 6.12). This process fosters an environment where evaluators work closely with schools. Research shows that evaluations that were followed by schools' improvement often included a close co-operation between evaluators and schools (Ehren and Visscher, 2008[162]).

Box 6.12. School evaluation in New Zealand

In New Zealand, schools are expected to take part in an "ongoing, cyclical process of evaluation and inquiry for improvement" (Education Review Office, 2016, p. 6[163]). This process is intended to be participatory and collaborative, and includes schools' self-reviews and the specific needs of individual school communities.

The Educational Review Office uses two types of indicators: outcome and process indicators. Outcome indicators concern student achievement, progress, and related goals, but broaden the focus from learning outcomes to well-being, social and emotional learning, and resilience. For instance, one of the indicators asks whether students "feel included, cared for, and safe and secure" or whether Māori students "enjoy education success as Māori".

Process indicators are divided into six domains each of which contains indicators related to equity and/or inclusion. For instance, the second domain focuses on whether school leadership pursues not only excellence, but also equity (e.g., in allocation of resources or alignment of teachers' continuous professional learning and student learning needs). The third domain also explores whether schools involve diverse communities in the school life (with a particular focus on Māori communities), and whether students have tools that support learning at home. The fourth domain focuses on culturally responsive curriculum, effective teaching and opportunity to learn.

The process of evaluation starts with noticing (e.g., examination of the outcome indicators) and investigating (e.g., examination of the process indicators). The process then continues with

collaborative sense making through conversations on effective and meaningful practices to meet the school community's specific aspirations. The conversations continue in selecting the most appropriate actions to take. The evaluation concludes with monitoring and evaluating the impact. Outcome indicators are applied to see the effect and the process restarts.

The co-operative and investigative nature of the school evaluation process is illustrated by the fact that there are many more process indicators compared to outcome indicators. The indicators are provided to schools as a source for dialogue and planning rather than to impose policy or make summative judgements. The inquiry thus focuses on identifying which school conditions are contributing to poor performance, and, conversely, which school processes and activities are contributing to excellence.

Source: Education Review Office (2016[163]), School Evaluation Indicators, https://ero.govt.nz/how-ero-reviews/schoolskura-english-medium/school-evaluation-indicators (accessed 18 November 2022) and Gergen and Gill (2020[164]), *Beyond the Tyranny of Testing*.

Co-operation can foster inclusive environments

Co-operation in school evaluations can be fostered between researchers and schools. Co-operation with academia can foster the development of evaluation literacy among teachers, by, e.g., providing training and facilitating collaborative discussions (Nelson, Ehren and Godfrey, 2015[153]). Co-operation between "outsiders" (such as academics) and practitioners can also contribute to the development of better understandings of educational processes that transform the values of equity into practice (Ainscow, 2010[165]). External support can also produce honest feedback that is not biased by internal school structures (ibid.). However, a reorientation of values and goals might be required for a fruitful co-operation (Hiebert, Gallimore and Stigler, 2002[166]). Teachers, for instance, may need to be encouraged to be more open to sharing their successful practices across the board and to view teaching as an activity that can be continuously improved (ibid.). Teachers are in the unique position of having tested the programmes and can thus describe their experiences to researchers first-hand (Link Engineering Educator Exchange, 2017[167]). Furthermore, if teachers share ownership of a research, they might find it more relevant and applicable for their practice (OECD, 2022[119]). Teachers can also help researchers to refine hypotheses so that they are relevant, while researchers can ensure their suitability for research (ibid.). School leaders, in turn, are crucial in setting the vision of the evaluation process, managing collaborative discussions, allocating resources (including time) and developing a culture that is inquiry and improvement oriented (Nelson, Ehren and Godfrey, 2015[153]).

In England (United Kingdom), a co-operation initiative between schools and a university focused on ways to support students from disadvantaged socio-economic backgrounds. The programme used a collaborative inquiry to identify the issues schools are facing. Subsequently and in co-operation with university researchers, evidence on how schools' practices could be developed was collected. The research was then applied to stimulate new thinking, continuous professional learning, and to identify appropriate response strategies to diverse student needs. The initiative developed close links between schools and the academia in order to improve student learning opportunities and outcomes of students, and enabled schools to develop more inclusive practices tailored to the strengths and weaknesses of each school (Ainscow et al., 2016[168]).

In Murcia (Spain), researchers applied a co-operative and evaluative research methodology to facilitate a self-assessment process (Arnaiz, De Haro and Guirao, 2015[169]). The purpose of the study was to help schools identify the barriers to participation and learning of all students, and to evaluate how inclusive the processes in the schools were. The researchers helped with the co-ordination and facilitation of the discussions among school leaders, psychologists, counsellors, teachers and special education teachers (from the schools as well as nearby psycho-pedagogical centres). These discussions led to suggestions

on continuous professional learning for teachers, collaborative teaching practices and school self-evaluation methods.

"School to school" approaches that invest into capacity-building and continuous professional learning of teachers and school leaders by sharing knowledge and best practices have been promoted as strategies that can foster a productive evaluation process and the development of policies and practices to advance student outcomes, including in schools with large proportions of diverse students and in schools facing challenging circumstances (Ainscow, 2012[170]; Ehren et al., 2017[171]; OECD, 2015[120]; West, 2010[172]). These collaborative approaches can take the form of schools getting together to learn from each other and provide support in the process of self-evaluation (Nelson, Ehren and Godfrey, 2015[153]). A shared leadership is a crucial factor in developing these networks. Shared leadership challenges the notion that schools compete with each other, and instead builds trust and fosters collaborations that can improve inclusive practices in schools (Ainscow, 2010[165]). For instance, Ainscow et al. (2016[168]) set up an equity research network in which each school team gathered evidence about students identified as being "most vulnerable to underachievement, marginalisation or exclusion". Subsequently, the teams shared their findings with colleagues in the partner schools as well as researchers to deepen understandings of practices, beliefs, assumptions, and organisational processes (Ainscow et al., 2016[168]). As a result, school staff had a clearer focus and plan on what they wanted to achieve. Causal inferences are difficult to make, but teachers also felt that overall school performance increased as a result of this approach (ibid.).

An evaluation of an initiative that focused on collaboration of schools in Wales (United Kingdom) also showed improved results for all students, including socio-economically disadvantaged students (Box 6.13).

Box 6.13. Central South Wales Challenge

The Central South Wales (CSW) Challenge was an initiative in Wales (United Kingdom) launched in 2014. The government invested large amounts of additional resources in schools with particularly high proportions of disadvantaged students. The schools chose one of four strands of collaborative activities:

- **Pathfinders** focused partnerships on building partnerships between schools identified as being high performing and those identified as being low-performing. The intent was to accelerate improvement in schools facing particularly challenging circumstances.
- **Hubs** provided continuous professional learning activities for teachers and school leaders based on regional needs. After two years, the hubs also focused on bringing schools and practitioners into collaborative networks and groups.
- **School Improvement Groups** were designed to break down barriers among schools and among local authorities.
- **Peer enquiry** was developed by school leaders in high performing schools who felt that they lack support. Senior leaders supported one another in a process of mutual enquiry. Eventually, peer enquiry also included a wider range of lower performing schools.

While causal implications are difficult to make, the evaluation revealed that student scores in all five local authorities that were part of the CSW Challenge improved at the fastest rate of all Welsh regions. The two most underperforming local authorities improved to the greatest extent. Moreover, average progress among socio-economically disadvantaged students (those eligible for free school meals) also revealed encouraging trends by exceeding government targets.

Source: Hadfield and Ainscow (2018[173]), Inside a self-improving school system: Collaboration, competition and transition, 10.1007/s10833-018-9330-7.

Some education systems' external evaluators already focus specifically on whether schools foster co-operations. In Northern Ireland (United Kingdom), every post-primary school is a member of an area learning community (ALC). The aim of the ALC is for schools to come together (along with further education colleges and other training providers) and plan a broad and balanced area-relevant curriculum (Department of Education, n.d.[174]). Inspections also focus on whether the ALCs meet these goals. According to some inspectors, the ALCs improve collaboration and facilitate better transition between primary and lower secondary schools, among other positive impacts. Inspections have also shifted their focus from accountability to the use of self-evaluation and help to facilitate strategic planning and "joined-up thinking" (Ehren et al., 2017[171]).

In the Netherlands, mainstream and special schools are required to work together to provide inclusive education for all children (Ehren et al., 2017[171]). As such, several dozens of school networks have been formed and are governed by new education authorities to facilitate the provision of high-quality education to all students. The inspectorate evaluates not only individual schools, but also the networks. In particular, the inspections focus on how each school, in collaboration with other schools in the network, provides adequate support to all students and suggests areas for improvement (ibid.).

Pointers for policy development

This chapter has reviewed the available evidence and country approaches relating to the monitoring of progress towards equity and inclusion and to the evaluation of policies and practices that seek to promote equity and inclusion. The policy pointers that follow are drawn from analytical work, country reviews and the available research literature. It should be stressed that there is no single model or global best practice of a monitoring and evaluation framework. The development of practices always needs to consider country-specific contexts and features of the respective education systems. Consequently, the following pointers for future policy development will not be of equal relevance for different countries. In some systems, the policy pointers might already be implemented while in others, they might not apply due to different social, economic and educational structures and traditions.

Design monitoring systems that assess progress towards equity and inclusion

Education systems differ in how they collect data on diversity in schools. In some education systems, data are collected on a small set of dimensions of diversity. In others, a wide range of student characteristics is considered in policy making. In some education systems a limited set of data is available at the national (or sub-national) level, while a broader selection of student characteristics is available at the school level. Some education systems are moving away from collecting data on dimensions of diversity and, instead, focus on support measures.

Monitoring systems should be designed with the aim of informing stakeholders whether progress towards equity and inclusion is being achieved and, if not, what improvements can be made in this respect. Progress in improving equity and inclusion in education can be measured using a wide range of instruments (indicator frameworks, national assessments with background data, longitudinal/ key stakeholder/international surveys, or specific reviews on equity and inclusion). In combination, these have the potential to provide a complex picture on the state of progress in improving equity and inclusion education. As such, the education system should not be focused solely on learning outcomes of students. After all, academic outcomes are only one aspect of the overall school experience. It is equally important to understand how happy and satisfied students are with different aspects of their life, how connected they are to others, and whether they enjoy a good physical and mental health. This understanding can be developed through collecting data on a range of student well-being outcomes, including academic, psychological, physical, social and material.

At the same time, monitoring systems should not be entirely focused on student outcomes. In considering equity and inclusion, it is important to take into account inputs and processes that also create equitable and inclusive school environments. Inputs can consider resources, access to continuous professional learning and others. Processes can include school climate, teaching practices etc. A comprehensive data collection supports decision-makers in informing improvements across the whole system.

Consider monitoring equity and inclusion in education in a comprehensive strategy

The monitoring of progress in improving equity and inclusion in an education system can be key to a better understanding of the needs of students, teachers, school leaders and other stakeholders involved in creating an equitable and inclusive school environment. Without relevant information on the diversity within the system or the progress in improving equity and inclusion, policy makers might judge the system according to the often-imperfect data they have available. This might misdirect them or, in the case of absence of data, may mean that they are unaware of challenges that need action.

Instruments that are used to measure progress towards equity and inclusion can be embedded in a strategy with clearly stated long-term goals for the education system. This can help to align the views of various stakeholders. Short- and medium-term priorities, in turn, can help identify the intermediary steps. Progress of the education system to reaching these can be monitored using indicators that can contain specific target values that a policy or a set of policies is aimed to achieve. When developing these indicators, it is important to consider the purpose of each of them so that it is carefully designed with the goal to measure what is valued, rather than value what is measured. That way, policy makers and other stakeholders can limit the possibility that the measure itself becomes the target. In ensuring that the information obtained through monitoring is used to inform policy development, it is important to form co-operative relationships between different actors and within the public sector.

Leverage evaluations to identify policies, programmes and processes that best address the needs of students

Apart from monitoring, education systems should evaluate the effectiveness of implemented policies, programmes and processes. Evaluation is a necessary pre-requisite for informing evidence-based policy development, curriculum, planning, reporting, resource allocation decisions and performance management. In the context of equity and inclusion, evaluations help with the identification of policies, programmes and processes that address the needs of students most effectively. Subsequently, evaluation can be instructive in identifying initiatives that can be scaled up and potentially institutionalised. Despite many challenges, some education systems engaged in evaluations that have led to improvements in equity and inclusion.

The process of evaluation should be approached with a mind-set that addresses concerns regarding inclusive practices at all levels of the education system. This entails bringing diverse perspectives and experiences to the process, and ultimately changing the attitudes about diversity, equity and inclusion at all levels of society. Indeed, the process of evaluation needs to be based on a consultative and co-operative process with a wide range of stakeholders. Clarity of purpose and the use of available resources can help to streamline the process of evaluation.

Ensure school evaluations can be used for improvements in equity and inclusion

School external evaluation (e.g., by school inspectorates) and internal evaluation (self-evaluation) have the potential to identify barriers in the processes that hinder equitable or inclusive education for all students by analysing school climate, relationships, learning support, barriers to continuous professional learning and other aspects of the school environment. The effective monitoring and evaluation of schools, including

around the aspects of equity and inclusion, are central to their improvement. Schools need feedback on their practices to identify, and address, areas for improvement.

Several practices can improve equity and inclusion as a result of school evaluation. First, it is important to find a common language on what constitutes a good education, clarify the meaning of inclusion and reach a shared understanding that draws school staff around a common purpose. Second, co-operative approaches can foster better understandings of educational processes that transform the values of equity and inclusion into practice. They can lead to the exchange of good practices, peer reviews and other environments in which schools are motivated to learn from each other. These approaches are increasingly common not only among schools, but also between external evaluators and schools, as well as researchers and schools.

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Notes

[1] See Annex in Chapter 1 for more information about survey methodology.

[2] Gender was not considered in the Survey question.

[3] Total difficulties score is a measure of five aspects of children's development: emotional symptoms; conduct problems; hyperactivity/inattention; peer relationship problems; and pro-social behaviour. The results are collected in the Strengths and Difficulties Questionnaire in the Scottish Health Survey. The questions cover themes such as consideration, hyperactivity, malaise, mood, sociability, obedience, anxiety and unhappiness (The Scottish Government, 2016[176]).

The most deprived areas are defined as those in the bottom quintile of the Scottish Index of Multiple Deprivation. The Index ranks several thousands of areas in Scotland based on income, employment, health, education, access to services, crime and housing (The Scottish Government, 2016[176]; The Scottish Government, 2020[177]).

[4] "Early leaver from education and training, previously named early school leaver, refers to a person aged 18 to 24 who has completed at most lower secondary education and is not involved in further education or training; the indicator 'early leavers from education and training' is expressed as a percentage of the people aged 18 to 24 with such criteria out of the total population aged 18 to 24" (EUROSTAT, 2019[179]).

[5] In the 2021/22 edition for lower secondary students, immigrant status can be inferred based on the question whether the student was born in Canada or not, and the socio-economic background can be proxied based on students reporting "Always" or "Often" going to school or to bed hungry because there is not enough food at home.

[6] Canada being one of the few exceptions. The Canadian 2021 census included questions on both sex at birth and gender identity. While only two options were provided for sex at birth, the gender question also included an "other" text box (Statistics Canada, 2020[175]).

[7] See Chapter 4 for more information on collaborative teaching.

[8] Structural and institutional racism and discrimination against Roma people (European Network Against Racism, 2022[178]).

7 The key steps to equity and inclusion in education

This chapter provides some conclusions and particularly discusses six key steps that are universally relevant for education systems striving towards equity and inclusion. These include developing a framework on equity and inclusion and embedding it in all areas of education policy; ensuring that the education system is flexible and responsive to the needs of students; including equity and inclusion as principles of both the main resource allocation mechanisms and targeted funding of the education system; engaging all relevant stakeholders in implementing the policy framework in schools and classrooms and strengthening coordination; preparing and supporting teachers and school leaders in developing the competences and knowledge areas for promoting equity and inclusion; and identifying students' needs, supporting them and monitoring their progress.

There is not a single pathway that all education systems should follow towards equity and inclusion. The journey and challenges for each education system will be different, shaped by their unique histories, cultures and population demographics. However, while the appropriate policy interventions for advancing equity and inclusion will thus depend on the individual context, the report highlights some general lessons and core elements to be incorporated in the development of education reforms.

This chapter discusses the key steps, summarised below, that are universally relevant for education systems striving towards equity and inclusion. These steps should be undertaken in parallel, reflecting the fact that advancing equity and inclusion in education requires a holistic approach involving different policy areas.

Six key steps to foster equity and inclusion in education

- Develop a policy framework on equity and inclusion and embed it in all areas of education policy.
- Ensure that the education system is flexible and responsive to the needs of students.
- Include equity and inclusion as principles of both the main resource allocation mechanisms and targeted funding of the education system.
- Engage all relevant stakeholders in implementing the policy framework in schools and classrooms, strengthening coordination.
- Prepare and support teachers and school leaders in developing the competences and knowledge areas for promoting equity and inclusion.
- Identify students' needs, support them and monitor their progress.

Develop a policy framework on equity and inclusion and embed it in all areas of education policy

Developing an equitable and inclusive education system requires a holistic approach. This implies the need for education systems to look beyond policy silos and connect them through a policy framework linking key areas for equity and inclusion (Cerna et al., 2021[1]). The principles of inclusion and equity are not only about ensuring access to education, but also about developing quality learning spaces and pedagogies that enable students to thrive, and to contribute to shaping a more just and inclusive society (UNESCO, 2017[2]). A comprehensive policy framework can ensure that education systems incorporate equity and inclusion in all relevant areas, from the design of curricula, to the conception of teaching practices, the capacity building of teaching staff, to the design of data collections and monitoring of student outcomes. A policy framework can also highlight the importance of fostering student well-being along with their achievement, and emphasise the role of schools in the development of inclusive environments.

Policy frameworks should also include a monitoring and evaluation component. Monitoring and evaluation is key to assessing and understanding the needs of both students and school staff and to identifying areas where policy interventions or adjustments are necessary. Monitoring and evaluation systems can be embedded in the policy framework with clearly stated long-term goals, and medium- or short-term priorities, so that the progress of the education system is monitored using these indicators.

Finally, policy frameworks should pay attention to the intersecting needs of students. Intersectionality highlights that student characteristics can interact to create unique student needs to be addressed by schools as well as the education system as a whole. Moreover, intersectionality also considers how students' needs and experiences are shaped by their environment and social contexts (including the school climate) (Varsik and Gorochovskij, Forthcoming[3]).

Ensure that the education system is flexible and responsive to the needs of students

Demographic trends and economic and social changes are resulting in increased diversity in the classroom and requiring education systems to be flexible and responsive to a range of student needs, adopting strategies that are sensitive to the specific local contexts and have equity and inclusion as their guiding principles (OECD, 2018[4]).

Responsiveness and flexibility need to permeate different education policy areas, from study pathways and school choice, to curriculum and teaching strategies. Indeed, flexibility is one of the key principles in designing an inclusive curriculum (OECD, 2021[5]), which does not assume identical outcomes for all learners but respects and responds to each student's unique needs, talents and aspirations. Curriculum flexibility also enables schools and teachers to make local decisions about the curriculum, create spaces for innovation, and allows schools to develop local solutions for local challenges.

The study pathways available both at the primary and secondary levels can have significant impacts on students' trajectories, influencing their access to tertiary education and transition to the labour market. Offering students and families a variety of educational pathways and parallel programmes can help ensure an educational provision that matches each student's interests and potential. However, it may lead to increased segregation, mismatches in students' pathway choices and a fragmentation of the educational offer (OECD, 2018[4]). It is important that study pathways are organised and implemented in a way that responds to the needs of both students and the labour market, with a flexible combination of vocational and academic choices, and that they are equivalent and consistent in quality (OECD, 2012[6]).

The practices that teachers adopt in the classroom also play an important role in the learning of their students. Students have different learning needs and styles and may benefit from various approaches and teaching strategies - which teachers should leverage to foster their learning potential. Different pedagogies, such as culturally responsive teaching, can support teachers in adapting to a range of diverse needs and supporting all students in their classrooms. Differentiated instruction, as in adopting a range of teaching formats – from one-on-one tuition to small group approaches – can also help teachers support the needs of students.

Overall, the responsiveness of the system, including its individual parts such as school leaders and teachers, is important to address the different needs of its students. Furthermore, the ability to be flexible in the ways of responding to such needs is key to developing an education system that promotes equity among its students and fosters the inclusion of all.

Include equity and inclusion as principles of both main resource allocation mechanisms and targeted funding of the education system

The way funding is allocated to schools and students has fundamental implications for the equity and inclusion of an education system (OECD, 2017[7]). It is therefore important to ensure that both main allocation mechanisms and targeted funding are designed with the explicit goals of fostering equity and inclusion in education. These two funding methods can serve these objectives through different means and entail different risks (OECD, 2017[7]). On the one hand, targeted funding allows education systems to better steer and monitor the use of public resources to foster equity and inclusion, but may entail risks such as the multiplication of programmes, a lack of coordination, and inefficiencies. On the other hand, leveraging main allocation mechanisms can reduce transaction costs and streamline the resourcing system. In countries that afford greater discretion to schools regarding the use of funding, the provision of equity funding through main allocations can give school professionals more flexibility in allocating funds to address particular local challenges. However, if not accompanied by strong accountability measures, main

allocation mechanisms may only offer governments limited oversight and control regarding how, and to what extent, funds are actually allocated towards equity and inclusion. Education systems should therefore carefully leverage both funding systems to foster equity and inclusion, taking into account and weighing up the challenges they entail.

With main allocation mechanisms, education systems can incorporate relevant parameters in their central allocation mechanisms' funding formulas to target resources to address specific needs or issues relating to equity and inclusion. For instance, including parameters such as the number of immigrant students or students with special education needs in a funding formula can also be implemented to target additional resources to specific groups.

With targeted funding, there are a variety of resources that can be targeted to support student needs or achieve particular goals. These range from financial transfers (e.g., for the provision of meals or transportation) to the allocation of physical and human resources. Additional funding for specific student groups can also allow educational authorities to address specific needs or goals (OECD, 2012[6]). This includes scholarships for socio-economically disadvantaged students or transportation for students with physical impairments.

Engage all relevant stakeholders and strengthen coordination across the education system

A range of stakeholders – including teacher unions, local authorities, parents and students, and organisations representing specific groups – contribute to shaping and implementing policies to promote equity and inclusion in education, and should be engaged meaningfully throughout the policy cycle. Initially, this entails involving them in the development of the policy framework to ensure a shared understanding of the goals, means and concepts adopted by the education system. Then, it translates into building partnerships to ensure the implementation of the framework across different government levels (from central to local) and to secure the collaboration with other government areas (e.g., health and social services), and non-state institutions (e.g., teacher unions and employers). Considering the feedback of different stakeholders is also key for education systems to identify challenges, and consequently address them. Stakeholder engagement should thus take the form of partnerships and co-creation activities, going beyond the mere communication of information. Meaningful stakeholder engagement is crucial for promoting equity and inclusion, as a lack of co-operation can lead to barriers in the achievement of policy objectives.

In addition to involving stakeholders in the design and implementation of policies, education systems need to understand and account for the interests of the different stakeholders. In decentralised systems, for instance, central authorities need to evaluate the incentives that drive local education providers and evaluate how their policies may be affecting them. A key step of stakeholder engagement is the analysis of their needs, incentives and likelihood of support – and accounting for these throughout the whole policy cycle.

Engaging stakeholders at the school level is also key in creating a positive school climate that supports all learners in achieving their educational potential. The involvement of parents, guardians and community members in students' learning and school activities has been shown to have a positive impact on students' educational outcomes and on their overall well-being. Parents, guardians and community members can also play an important role in supporting, driving and promoting the successful implementation of initiatives and policies to facilitate the inclusion of diverse students.

Raising awareness of diversity is a foundational step in engaging different stakeholders in policies and practices to advance equity and inclusion in education. It is crucial to mitigate stereotypical or discriminatory beliefs that may impact diverse students in the classroom, ensuring that different

stakeholders recognise the importance of advancing equity and inclusion. This can occur through the promotion of education campaigns and the provision of information resources that can help challenging stereotypes and prejudices in society and to promote values of acceptance and inclusion.

Prepare and train teachers and school leaders in the area of equity and inclusion

Teaching is a complex, multifaceted task, and even more so in a context of increasingly heterogeneous societies where students from a diverse range of experiences and with a variety of lived experiences and learning needs come together in the classroom. In order to be able to create equitable and inclusive learning environments that support all learners in achieving their educational potential, teachers need to be equipped with a range of competences, knowledge and attitudes (Cerna et al., 2021[1]). Knowledge areas for equitable and inclusive teaching are wide-ranging and may encompass cultural anthropology, social psychology, child cognitive development, integrated learning and second language acquisition (OECD, 2017[8]). These areas are in addition to a strong understanding of the different dimensions of diversity and of how they may intersect, which is a crucial foundation for the creation of equitable and inclusive learning environments (Cerna et al., 2021[1]). Supporting the learning and well-being of all students also requires teachers to have strong theoretical knowledge of differentiated instruction and the skills to put this into practice (Brussino, 2021[9]). In fact, to create positive learning environments, teachers should go beyond learning outcomes, create inclusive environments and foster students' sense of belonging.

Research shows that without adequate learning opportunities throughout the teaching life-course, teachers often feel unprepared to address the diverse needs of students (OECD, 2019[10]). It is therefore important that education systems prepare and support teachers to promote equity and inclusion, through initial teacher education (ITE) and continuous professional learning. As ITE plays a critical role in shaping teachers' values, competences and knowledge before their entry into the profession, ensuring that equity and inclusion are embedded as core, underlying themes within ITE curricula is vital to ensure that teachers have the knowledge and competences required to create inclusive learning environments that enable all learners to achieve their educational potential. Moreover, ensuring that teachers have opportunities to update and refresh their knowledge and reflect on good practices for equitable and inclusive teaching is crucial in a context of increasing student diversity and other global trends that are changing the nature of the classroom environment. It is therefore important for education systems to provide a wide range of high-quality professional learning options that allow teachers to develop the knowledge and competences necessary for equitable and inclusive teaching.

Ensuring the diversity of school staff is another important component in creating more equitable and inclusive learning environments. Research demonstrates that increased diversity among teachers is important for the learning and well-being of diverse students, with studies showing a range of positive impacts of teacher-student congruence in terms of shared belonging to ethnic groups or national minorities and gender. Greater diversity among teachers can also promote more equitable and inclusive classroom environments, with positive impacts for the student body as a whole. Attracting diverse candidates into ITE programmes is a key step to enhancing the diversity of the teaching workforce, as is ensuring diverse teachers are adequately supported, to promote their retention in the profession. This involves understanding and addressing the specific challenges diverse teachers may face, on top of the stress and demands associated with the profession generally.

Furthermore, school leaders play an important role in facilitating equitable and inclusive teaching, and are central actors in shaping and driving the effective implementation of policies and practices for equity and inclusion. Furthermore, school leadership is crucial in the creation of a positive school climate in which teachers feel supported and collaborate with one another, parents and guardians engage in school life and activities voluntarily, and students feel a sense of belonging.

Identify students' needs, support them and monitor their progress

Identifying students' specific needs is fundamental to promoting equity and inclusion in education. Diagnostic assessments are often used to identify students who are at risk of failure, uncover the sources of their learning difficulties, evaluate their learning needs, and plan for appropriate interventions or remediation strategies (OECD, 2013[11]). Generally, diagnostic assessments focus on specific areas of learning and produce fine-grained information about individual student strengths, weaknesses and learning needs. Moreover, many diagnostic tools are designed to uncover the causes of students' learning difficulties, and their results are often used to support the students. This support is developed through informing future programme planning, designing differentiated instruction and delivering remedial programmes.

Having identified the needs of students, education systems must then ensure that these needs are addressed in each school and classroom. This entails providing the tools for teachers to help their students, such as Individual Education Plans, and curricular accommodations and modifications. Individual Education Plans are tailored programmes designed on the basis of the individual student's difficulties and strengths, and often prescribe the use of accommodations and modifications. While accommodations help students access the curriculum through instructional or environmental adjustments, modifications involve adjustments to the curriculum to support students' educational progress. Ensuring that students receive the appropriate support can also include the provision of relevant digital and assistive technology, which can aid students in overcoming learning barriers, while also supporting their well-being. Teachers might also need to alter their pedagogical approaches to respond to students' needs. A useful tool that supports teachers and education stakeholders in designing and implementing inclusive teaching through curricula modifications, assessments and pedagogies is the Universal Design for Learning (UDL). The UDL is particularly helpful in increasingly diverse classrooms, as it provides the flexibility necessary to support diverse learning needs, and dismantles barriers to participation and learning for all.

The identification of student needs should not focus solely on learning needs. Schools can play a crucial role in providing access to psychological services (such as counselling or psychotherapy), particularly for students who may otherwise face barriers in obtaining the support they need in this regard. Schools can also help support the well-being of diverse learners through social and emotional learning programmes and trauma-informed teaching strategies.

The assessment of student progress is another key step. In the classroom, the way in which student assessments are designed, implemented and used can have a strong impact on student engagement, motivation and learning outcomes. Assessments should be implemented so as to allow all students to show what they have learned and understood, without being disadvantaged by individual characteristics that are irrelevant to what is being assessed, or by the evaluator's biases. Guidelines for equitable and inclusive assessment design can be developed at the system level that set out how to avoid bias in aspects such as content validity, item selection and method choice. Ensuring equity and inclusion in student assessment processes also entails offering students a variety of ways to demonstrate their knowledge by employing multiple assessment forms and techniques.

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Equity and Inclusion in Education

FINDING STRENGTH THROUGH DIVERSITY

Governments and education policy makers are increasingly concerned with equity and inclusion in education due to several major global trends such as demographic shifts, migration and refugee crises, rising inequalities, and climate change. These developments have contributed to increasing diversity within national populations and flagged some concerns around the ability of education systems to be equitable and inclusive of all students.

This report by the Strength through Diversity project examines how education systems can respond to increasing diversity and foster greater equity and inclusion in education. Based on a holistic framework for studying diversity, equity and inclusion in education, the report examines five key policy areas (i.e., governance; resourcing; capacity building; school-level interventions, and monitoring and evaluation), provides examples of policies and practices, and offers policy advice on promoting more equitable and inclusive education systems.

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