

Freedom of education index. Correlations with selected indicators

Alfred Fernández †

Director of OIDEL

Ignasi Grau

Deputy Director of OIDEL

In 2016, OIDEL published the first Education Freedom Index (FEI) to assess the situation of freedom of education in the world. Two years later, OIDEL publishes a new report that allows us to relate the FEI to other indicators such as public spending and social cohesion. The objective of this research is to highlight the role of freedom of education in the construction of democratic and inclusive societies, thus laying the foundations for future research that correlates the FEI index with the democratic level of a country, or with its indicators of good governance.

Introduction

In 2016, OIDEL published the Freedom of Education Index (FEI) to study the situation of freedom of education around the world with a human rights-based approach. Our intention was to shed light on the role of this freedom in building inclusive democratic societies.

In line with the focus of Education 2030 on the importance of greater participation of civil society, we thought it was important to develop a tool to measure the participation of civil society in the provision of the right to education.

The 2030 Agenda for Sustainable Development is a universal and ambitious agenda that aims to eradicate poverty through sustainable development by 2030. The ambitions for education are synthesized in the Sustainable Development Goal 4 which aims to ensure quality, inclusive and equitable education, and to promote lifelong learning opportunities for all. The present work has taken into consideration in particular two of the three principles formulated in The Education 2030 Action Plan. First, education is a fundamental human right and an enabling right, which is why countries must ensure universal equal access to inclusive and equitable quality education and training (UNESCO, 2016, par.28).

Secondly, education is a public good, of which the State is the duty bearer (GPE, 2016). However, this second principle does not imply that education must be supported exclusively by the State. The role of the State is essential in setting and regulating standards and norms. This is why the document recalls that education requires a collective effort that civil society, families, communities can take part in, as they all have an important role to play (UNESCO, 2016, par. 10). Indeed, Education 2030 stresses that: Education is a shared societal endeavour, which implies an inclusive process of public policy formulation and implementation.

In addition, Education 2030 recalls that: Civil society organizations (CSOs) - including representative, broad-based coalitions and networks, play essential roles - need to be engaged and involved at all stages, from planning through monitoring and evaluation, with their participation

institutionalized and guaranteed (UNESCO, 2016, par. 80). Freedom of education has an important role to play in achieving Goal 4 of the Sustainable Development Goals (SDGs). It is also important to remember in this regard two key elements to implement this goal. The first involves creating effective learning environments. In this regard, non-governmental schools¹ because of its closeness to communities can play an essential role in creating this type of environment. The second concerns, the financial component of the right to education which is a cornerstone for the realization of this right. The State has a fundamental role to play in using public resources - which belong to all citizens - for all citizens. By funding only governmental-schools, the State will not guarantee an accessible and acceptable education for all. The characteristics of education in line with the right to education are contained in the General Comment on Article 13 of the Committee on Economic, Social and Cultural Rights (Economic and Social Council- United Nations, 1999, par.6). These characteristics are interdependent, we do not see how we can speak of an endowment that would not be acceptable to parents and students.

As the Special Rapporteur noted in her report to the Human Rights Council of 2017 national budgets for education must recognize incremental costs based on particular circumstances. The educational needs of children (...) belonging to minorities may require additional resources to ensure that the quality of education provided to them is aligned with national standards (BOLLY, 2017, par. 21). Indeed, school choice must be understood as a human right and not a consumer good (GLENN, 1999: 71). In the same spirit, the jurisprudence of the Constitutional Courts of Spain (5/1982 and 77/1985) and France (23 November 1977) stresses that in the field of education, the State must ensure equality before the law for all citizens, in particular by providing financial resources to the various schools without discrimination in order to guarantee the practice of freedom of education.

In the same line, the Resolution of the European Parliament on Freedom of Education in the European Community (March 1984) states in paragraph 9:

« The right to freedom of education implies the obligation for States to make also possible financially the practical exercise of this right and to grant schools public subsidies necessary for the exercise of their duties and fulfilling their obligations in conditions equal to those enjoyed by the corresponding public institutions, without discrimination against organizers, parents, students or staff; However, this does not preclude that some personal contribution is claimed from the pupils of the schools created by the private initiative, this contribution reflecting their own responsibility and aimed at strengthening their independence.»

Freedom of education is at the core of the right to education. Indeed, it appears in paragraph 3 of Article 26 of the Universal Declaration, in the paragraphs 3 and 4 of the International Covenant of Economic, Social and Cultural Rights and finally in Article 5 of the Convention against Discrimination in Education. Also, the most recent Human Rights Declaration, the UNESCO Universal Declaration on Cultural Diversity (2001) points out that “(...) all persons are entitled to quality education and training that fully respect their cultural identity (art. 5)”. Regionally, it is also recognized by the article 2 of the first Protocol to the Convention for the Protection of Human Rights and Fundamental Freedoms.

In the same vein, the Paris Declaration of 17 March 2015 on the promotion of the common values through education emphasizes cooperation with parents and families in order to root these fundamental values that enable young people to become active, responsible and broad-minded members of society.

Methodology

The aim of our research is to work on the relationships of our Index with other indicators related with good governance in the broad sense of the expression.

Indeed, the main objective of this report is to verify certain hypotheses of our research:

- a) Public freedoms form a whole, the FEI should be able to be correlated with other indicators relating to freedoms. Freedom in the World (FIW) is an indicator of Freedom House that assesses for each country the degree of political and civil liberties. We analysed the link between freedom of education and freedom of opinion, conscience and expression, which are essential for the preservation of democratic and pluralistic societies. In order to evaluate the potential link between freedom of education and freedom in the countries, we crossed the FEI data with those of the FIW 2017.
- a) Freedom of education is at the root of pluralism, an essential component of democracy. Therefore, the FEI should also have a positive correlation with the EIU (Economist Intelligence Unit) Democracy Index (hereinafter EDI). The EDI is a report that The Economist publishes regularly to evaluate the quality of different democracies. We used the 2016 report. This indicator ranks countries to a scale of 1 to 10. It is important to recall what the European Court of Human Rights held concerning freedom of education: « It is on the fundamental right to education that is grafted the right of parents to respect for their religious and philosophical convictions, and the first sentence doesn't distinguish, any more than the second, between State and private teaching. The second sentence of Article 2 of Protocol nº1 aims in short at safeguarding the possibility of pluralism in education which possibility is essential for the preservation of the « democratic society » as conceived by the Convention » (Folgerø v. Norway, 2007, par. 84).
- b) The active role of civil society should promote quality of education by diversifying the offer and allowing better adaptation to the needs of the student. The FEI should have a significant correlation with PISA. PISA assesses student performance in mathematics, science and reading. This study is to this day considered the most influential and reliable evaluation of quality in education.

We are aware that the quality in education cannot be reduced to the indicators proposed by PISA. Again, according to the Special Rapporteur Mr. Singh, « a holistic conceptual framework of quality education comprises: i) a minimum level of student acquisition of knowledge, values, skills and competencies; ii) adequate school infrastructure, facilities and environment; iii) a well-qualified teaching force; iv) a school that is open to the participation of all, particularly students, their parents and the community. » (Human Rights Council, 2011, par. 21(A/HRC20/21)).

In a similar way, the UNESCO document “Rethinking education: towards a global common good?” highlights that the right to quality education implies the right to relevant learning, tailored to the needs of students. Therefore, to be qualified as relevant, learning should reflect what each culture and each human group defines as the conditions necessary to live in dignity (UNESCO, 2015: 32).

We compared the FEI results with those of PISA – which, despite its limitations, remains an excellent tool for assessing the quality of education – in order to analyse the effects that freedom of education has on the quality of education. It should be noted that in a recent study on the essential factors explaining the improvement of school results, L. Woessman emphasizes that this is due to freedom of education among other

factors such as school autonomy, external examinations and a greater commitment on the part of families (Woessman, 2016).

Finally, we wanted to evaluate the accuracy of two arguments frequently raised against the implementation of freedom of education.

- a) Freedom of education would necessary imply an increase in public spending. The indicator we compared with the FEI was the share of public spending on education as a percentage of total expenditure. The goal was to see if a higher level of freedom of education implies or not an increase in public spending on education.
- b) Freedom of education would harm social cohesion. We also compared the FEI with the Social Cohesion Indicator of the OCDE to observe if freedom of education has an explanatory value on the social cohesion.

Results

FREEDOM IN THE WORLD

Freedom in the World 2017 is a report carried out by Freedom House (Freedom House, 2017). The report assesses the state of freedom in 195 countries in 2017. According to the Freedom in the World 2017 Methodology, “Each country and territory is assigned two numerical ratings—from 1 to 7—for political rights and civil liberties, with 1 representing the most free and 7 the least free. The two ratings are based on scores assigned to 25 more detailed indicators. The average of a country or territory’s political rights and civil liberties ratings determines whether it is Free, Partly free, or Not Free.” However, the way the FIW is designed allows us to enlarge the scale of points from 0-7 to 0-100. The FIW is based on two sub-categories: Political Rights (scale 0-40) and Civil Liberties (scale 0-60). The research understands political rights as the rules of the democratic game: elections, role of the opposition or the protection of pluralism. The research understands civil liberties as the guarantee of rights and individual liberties such as the freedom of press and freedom of religion.

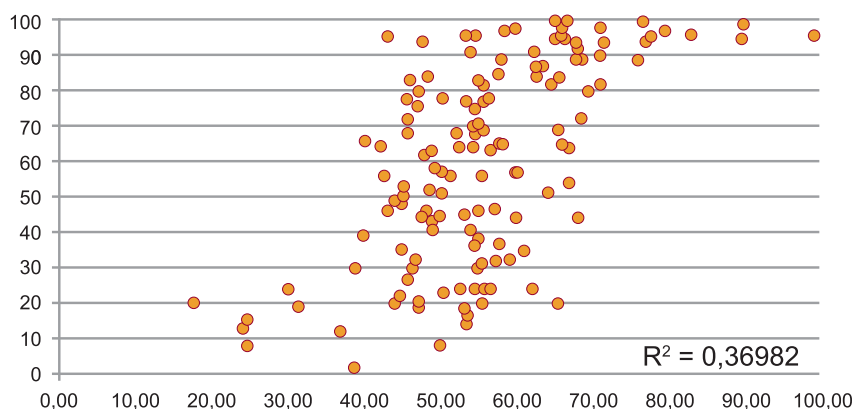
In order to assess the possible link between freedom of education and the state of freedom of a country, we have crosschecked the FEI with the data of the FIW 2017 report.

As it is possible to see in the global graphs, there is an appreciable correlation between the overall FIW and the FEI ($r^2= 0.37$). This means that, from a global perspective, to a higher level of political rights and civil liberties corresponds a higher level of freedom of education.

Moreover, if we assess the correlation of FIW – FEI of the ten countries with the highest and the lowest FEI punctuation, the correlation that results is more significant ($r^2= 0.87$).

However, when analyzing the different regional groups, the correlation is not always that strong. Concerning the relation between the FIW and FEI in the different regions, in all the cases the tendency is positive; nevertheless, we only observe significant correlations in the case of Latin America & the Caribbean ($r^2= 0.37$) and Asia & the Pacific ($r^2= 0.3$).

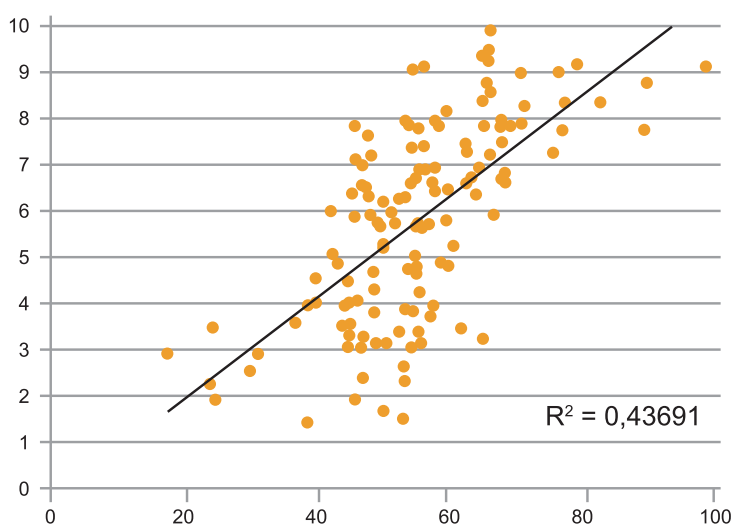
FEI / Freedom in the World



DEMOCRACY INDEX (EDI)

The Democracy Index (EDI) is an indicator that assesses the state of democracy throughout the world (The Economist Intelligence Unit, 2016). The score of a country in this Index (from 0 to 10 points) is determined by the 60 indicators distributed among five categories: electoral process and pluralism, civil liberties, the functioning of government, political participation and political culture. The aim of this analysis is to assess if there is a correlation between democracy and freedom of education. We will compare, for each country and region, the results of the EDI and the FEI to establish the correlation between democracy and freedom of education. From a worldwide perspective, data shows a significant correlation ($r^2= 0.44$) between the EDI and the FEI. In most regions, higher scores in the EDI translate into a higher score in the FEI. On this regard, we can observe significant positive correlations in the following regions: Asia & Pacific ($r^2= 0.41$), Arab States ($r^2= 0.3$), and Latin America and the Caribbean ($r^2= 0.4$). In conclusion, it can be seen that the countries where pluralism, civil liberties, political participation and political culture are respected the most, freedom of education is the highest.

FEI / EDI



PISA 2016

The aim of this section of our research is to observe the relation between FEI and PISA. PISA assesses the school performance of students of 15-year-old on science, mathematics and reading.

Before to start talking about the assessment itself, some methodological clarifications are required. First is that not all the countries of the FEI have done the PISA test. Either, not all the PISA countries are included in the FEI. Therefore, we only have compared the countries that appeared in both indicators. Secondly, considering China, PISA makes a distinction between China, Hong Kong and Macau. For this assessment we are going to take into consideration only China. Thirdly, PISA consists of three separate indicators based on science, mathematics and reading, all of them with the same scale of values. The aim of this comparison is to compare the FEI with PISA as a single indicator of quality of education. What we have done in order to have a single PISA indicator is to sum the three indicators (science, mathematics and reading) and then divide the amount by three.

Once again we have compared through a linear regression.

If we fit a classical linear model to look at the Freedom of Education Index –aka oidel index- as a possible explanatory variable of PISA (*Figure 1. Output of the regression*).

Figure 1. Output of the regression

```
##
## Call:
## lm(formula = TOTAL ~ Index, data = oid_pisa_correct)
##
## Residuals:
##      Min       1Q   Median       3Q      Max
## -103.073  -32.784   4.043   24.851   88.370
##
## Coefficients:
##              Estimate Std. Error t value Pr(>|t|)
## (Intercept)  316.5934    31.4579   10.064 1.17e-14 ***
## Index         2.3174     0.4913    4.717 1.40e-05 ***
## ---
## Signif. codes:  0 '***' 0.001 '**' 0.01 '*' 0.05 '.' 0.1 ' ' 1
##
## Residual standard error: 43.13 on 62 degrees of freedom
## Multiple R-squared:  0.2641, Adjusted R-squared:  0.2522
## F-statistic: 22.25 on 1 and 62 DF,  p-value: 1.404e-05
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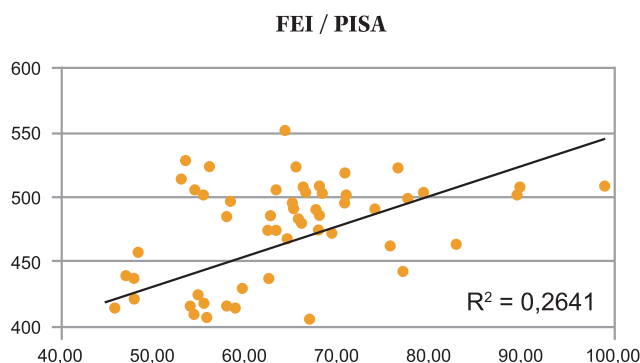
We have evidence of the significance of PISA as an explanatory variable but the low r^2 (i.e. 0.2522) tells us that this relationship is not so strong. However, we have to notice that the presence of outliers may influence our poor result and that, in the social science field, there is a tendency to accept low r^2 values due to the complex nature of the phenomena analyzed.

We have performed a statistical test (i.e. Wilcoxon test) in order to observe if there is a significant difference in the PISA total score depending on the value of the FEI. We split the countries in two balanced groups depending on the result of the FEI. The aim of this division is to get evidence for the positive difference between “High FEI index” group – countries with a higher FEI punctuation- and “Low FEI index” group – countries with a lower FEI punctuation- in terms of the PISA total score (*Figure 2. Output of the test*).

Figure 2. Output of the test

```
## Warning in wilcox.test.default(high_oidel_index, low_oidel_index,
## alternative = "greater", : cannot compute exact p-value with ties
##
## Wilcoxon rank sum test with continuity correction
##
## data:  high_oidel_index and low_oidel_index
## W = 807.5, p-value = 3.726e-05
## alternative hypothesis: true location shift is greater than 0
```

We reject at a 5% level of significance that the two groups have the same average and thus we conclude that being in the category of “High FEI index” will on average assure you a higher result in the PISA total score with respect to the “Low FEI index” group. On the complementary side, we can also affirm that being in the “Low FEI index” group will on average get you a lower PISA total score, with respect to the countries that belong to the “High FEI index” group.



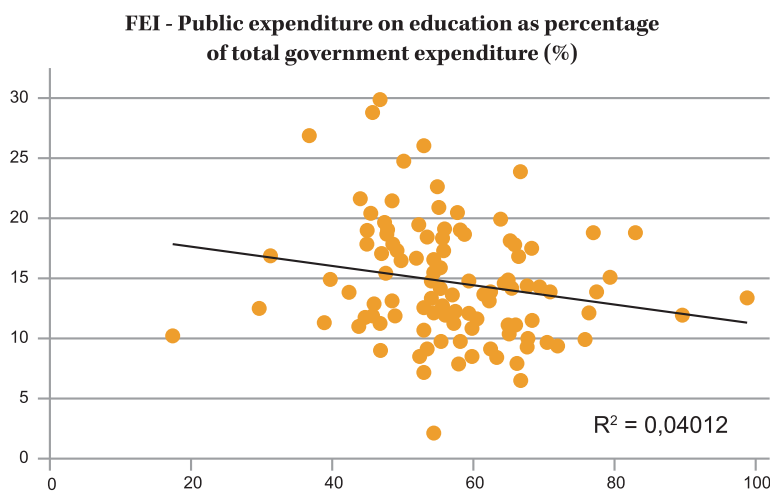
PUBLIC EXPENDITURE ON EDUCATION

The aim of this analysis is to determine if there is a correlation between the percentage of public spending on education and the freedom of education. From the comparison between these factors we will be able to determine if freedom of education implies an increase of public spending.

From a worldwide perspective, data show that there is no correlation between the public expenditure on education as percentage of total government expenditure and the score in the FEI. The lineal comparison shows that there is a negative tendency between the variables.

From a regional perspective, analyzed data shows that there is no correlation between the public expenditure on education as percentage of the total government expenditure and the FEI score in the following regions: Europe and North America, Latin America and the Caribbean. There is not enough data of the Arab countries to analyze possible correlation between variables.

The mean of the public expenditure on education as percentage of the total government expenditure in the region of Europe & North America is 12.33%, 2.24% less than the global mean.



SOCIAL COHESION

One of the reasons used against freedom of education is the negative effect in social cohesion.

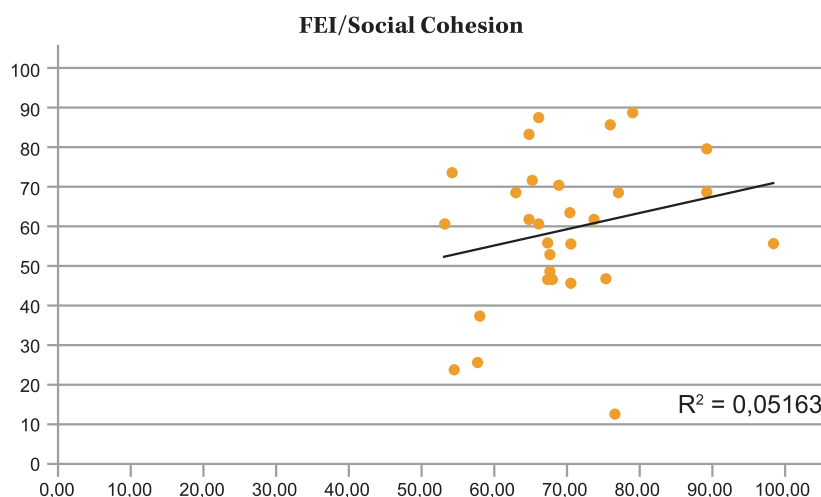
The aim of this comparison is to observe the relation between the FEI and social cohesion. It is difficult to find a unique definition of social cohesion. We will use the concept of trust used by the OCDE in the framework of Social Cohesion indicators to measure it. According to Algan and Cahuc a society with strong social cohesion is one where citizens have trust in other ones and in public institutions (Algan & Cahuc, 2013).

The concept trust is a cornerstone of social cohesion as it has been pointed out by many specialists. For instance Chan points out that “social cohesion is a state of affairs concerning both the vertical and the horizontal interactions among members of a society, as characterized by a set of attitudes and norms that include trust, a sense of belonging, and the willingness to participate and help, as well as their behavioral manifestations” (Chan et al. 2006: 290).

The OECD indicator assesses the answers of the following question: “Generally speaking would you say that most people can be trusted or that you need to be very careful in dealing with people?” The scale of this indicator ranges from 0 to 100 points.

The Freedom of Education Index includes 136 countries, however, the OECD indicator on trust only include 20 countries. We have compared only the countries that appeared in both indicators. One of the strengths of comparing only member States, countries of the OECD, is that they have certain common characteristics. OECD countries included in this indicator adhere to market-based economy and democracy, which enables to exclude variables related to poverty or lack of democracy.

We can observe that there is a positive tendency but with a low correlation. We cannot affirm that freedom of education has a negative effect on social cohesion.



CONCLUSIONS

The aim of the report is to verify hypotheses through significant statistical correlations. In short, it hopes to contribute to base educational policies on evidences, as set out in Education 2030 (UNESCO, 2016, par.64).

Freedom of education can help estimate the quality of democracies, as it is a way to observe the trust of the governments towards citizens and civil society. In this regard, we have assessed the relationship between the FEI and three important indicators.

Firstly, we have crossed the FEI with the Freedom in the World (FIW). We can observe a significant positive correlation between the FEI and the FIW. Moreover, we can highlight that regionally this correlation is also observed in the regions Arab States, Asia & the Pacific and Latin America & the Caribbean.

Secondly, we can observe a strong relationship between the Democracy Index and the FEI. Regionally we can observe a significant positive correlation between these two variables in the Arab States, Asia & the Pacific and Latin America & the Caribbean.

Finally, we have compared the impact that the educational policies with a freedom approach have had on the last edition of PISA, published on the 6th of December 2016. Indeed, we can observe a positive tendency between FEI and PISA. Moreover, with a 5% level of significance, the countries with a higher FEI punctuation have on average higher results in PISA than countries with a lower FEI punctuation.

Finally, we have evaluated the accuracy of two arguments frequently used against freedom of education.

Firstly, we have used the Social Cohesion indicator of the Organization for Economic Co-operation and Development (OCDE) and we have compared this indicator with the FEI. On this regard, the conclusion we have reached after mixing these two variables is that we cannot affirm that freedom of education has a negative effect on social cohesion.

Secondly, one of the most intense discussions in the political debate concerns the public funding for non-governmental schools. This funding is essential to guarantee parental rights as well as equity. One classical argument against the implementation of a freedom approach in educational policies is that it implies an increase on public expenditure. However, when we have crossed the results of the FEI with the percentage of public spending on education, the tendency between these two indicators is negative. Moreover, there is no correlation between these two variables, neither at the regional level. Therefore we cannot affirm that the development of freedom of education implies an increase in public funding.

Biographical note:

OIDEL: OIDEL is a non-profit, non-governmental organisation, with consultative status with the United Nations, UNESCO and the European Council. It is legally recognized as a public interest association under Swiss law. The primary objective of OIDEL is the promotion of the right to education as a fundamental human right. Such a right cannot exist without the pre-

sence of State benefits and the protection of individual liberties. The action of OIDEL is mainly based on article 26 of the Universal Declaration of Human Rights and article 13 of the International Covenant on Economic, Social and Cultural rights. OIDEL was created in 1985, by forty political personalities, educational experts and parents. It has consultative status with the United Nations, UNESCO and the European Council, and collaborates with the European Union and international non-governmental organisations.

Alfred Fernandez: PhD on Philosophy by the Universidad Complutense de Madrid. He has been the General Director of OIDEL for more than 30 years and the director of the Collège Universitaire Henry Dunant for more than 20 years. Also he has been the Chief of the NGO Platform on the Right to Education of the United Nations in Geneva and a member of the Chair UNESCO in democratic citizenship and cultural

freedom of the University of La Rioja. He did more than 20 publications on the right to education and educational freedom. He recently passed away.

Ignasi Grau: He studied Law at the Universitat Pompeu Fabra and Economics at the Universitat Oberta de Catalunya. He is currently studying a Master in Political Science at the Université de Genève. For five years he has been working at OIDEL, an NGO he represents before the United Nations, the Council of Europe and the European Parliament in the field of freedom of education. In particular, he has drafted the 2016 Freedom of Education Index and other scientific documents developed by OIDEL. Recently, he has collaborated with a chapter in the book: *Derechos Humanos del S. XXI – 50° Aniversario de los Pactos Internacionales de Derechos Humanos*. Edited by the professor A. M. Vega Gutierrez (Aranzadi, Thomson)

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