

CHAPTER-V

EDUCATION AND ECONOMIC EQUALITY

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5.1 INTRODUCTION

It is universally recognized that the earnings of individuals are positively related with their educational attainment. Each level of education is believed to add to the productive skills thus enhancing income potential. The higher incomes received by the more educated are, thus seen as a reward for their superior productivity and a return on investment in education.

Given the general relationship between education and income levels it is plausible to hypothesize that education could be an important instrument to bring about reduction in inequality of incomes which arises basically due to uneven distribution of ownership of material resources. On the other hand, if the pattern of educational opportunity conforms to the pattern of existing asset and income distribution; the positive association between education and earnings would lead to increasing inequality with educational expansion.

The human capital theory also suggests that the education acts as an equalizer of income distribution through promoting the education among population with limited or no physical capital and other income-generating resources. The higher economic status of certain groups of population is seen partly to be a function of the degree of their participation in the utilisation of educational opportunities.¹

Analysing the enrolment rates and the pattern of income distribution in different countries the studies of Adelman² and

Chenery³ have noticed negative relationships between enrolment rates and inequality in the pattern of income distribution in almost all the countries. On the other hand, correlating the literacy rates and income distribution, Ahluwalia⁴ finds that the higher levels of literacy are associated with lower levels of income inequalities in developing as well as in developed countries. Chiswick⁵ in his study of nine countries also noticed that there is a significant relationship between income inequality and inequality in the pattern of educational attainment among population in different countries. Analyzing the data related on income and educated population for eleven developed and thirty-eight developing countries the study by Psacharopoulos⁶ reveals that the inequalities in the participation of population in education are positively and significantly related with the Gini Co-efficient of income inequalities in different countries. Thus, the greater expansion and equitable accessibility of population with comparatively lower income group to educational facilities may be regarded an effective measure for mitigating the extent of inequalities in the pattern of income distribution.

Visualising education as an important instrument for improvements in socio-economic condition and bringing about a reduction in income inequalities, a great significance is attached in all countries to the expansion and development of educational facilities. Besides, subsidized educational opportunities are also provided in many cases for economically and socially disadvantaged groups of population. Inequality in income distribution itself impedes the role of education in reducing them as educational opportunities get only unequally utilized by different socio-economic groups. Studies pertaining to the relationship

between socio-economic origin and utilisation of educational opportunity highlight that all income groups have registered significant progress in the utilisation of education at different levels. The problem of equality in income distribution is found to be less acute in countries with larger extent of educational facilities.

5.2 EQUALITY

Inequality based on social statuses and income that are evaluated as higher or lower gives rise to inequality. Economic inequality means that some individuals or groups are disadvantaged in the matter of access to and possession of societal resources or values and, therefore, they remain relatively deprived. Modern societies are very much concerned about inequality as social and economic issues. Economic equality has been accepted as an important societal goal in most modern societies. The educational system is generally looked up on as one of the potent factors that will positively contribute to the efforts in the pursuit of this goal. It is the societal evaluation attached to differences, whether natural (as in case of ascribed statuses) or social (as in the case of achieved statuses), that is the critical factor in inequality. As long as there are resources or things (material and non-material) that are differentially valued in society, differences based on access to or possession of these resources or things will give rise to inequality. If societal evaluation of resources cannot be eliminated; then the option in pursuit of economic equality is to redistribute the valued resources. Since equal distribution of all societal resources in a mathematical equation is not a realistic proposition, social equality in fact pursues some kind of redistribution of resources that will result in the reduction of the existing

inequality. Thus, economic equality does not mean equal sharing of the societal resources that determine efficiency among individuals. The goal of economic equality in operational terms, therefore, is often termed as equity or distribution of societal resources in a more desirable or less unequal manner. Perceived as less unequal, the resulting social order is accepted as a fairer one. Two major principles are applied in the distribution of societal resources in modern societies in pursuit of social equality. These are the individual based equality of opportunity and the group-based representation.

Equality of opportunity is based on the premise of the existence of some kind of equality among individuals with regard to eligibility or right to societal resources, akin to equality before law. Equality before law accepts that no distinction can be made between individuals because as human beings, they have the same intrinsic worth. Irrespective of the differences in natural talents and abilities or ascribed and achieved social statuses, all human beings are equal and share the same rights. Equality of opportunity literally means that all individuals are given an equal chance to have access to societal resources. Economic inequality is viewed as absence of equality of opportunity, wherein some individuals are deprived of at least some of the societal resources that accord them higher social status because of the social evaluation of the statuses already ascribed to them. Thus, ensuring that these individuals are in no way prevented from access to societal resources on account of their ascribed statuses is perceived as a fair way of dealing with social inequality. The notion of equality of opportunity, therefore, is accepted as a goal in pursuit of economic equality. The reference point in the notion of equality of opportunity is the individual and not the group. "The

principle of equality of opportunity derives from a fundamental tenet of classic liberalism: that the individual and not the family, community, or the state is the singular unit of society, and that the purpose of societal arrangements is to allow the individual the freedom to fulfill his own purposes - by his labour to gain property, by exchange to satisfy his wants, by upward mobility to achieve a place commensurate with his talents" (Bell, 1977: 616).⁷

The essence of the principle of equality of opportunity is equality in the chance to acquire resources and not necessarily redistribution or equitable distribution of resources. Equality of opportunity does not ensure redistribution of societal resources towards reduction in inequality because it is based on individual inequality (or differences) and sanctions fair competition for societal resources among individuals with different natural endowments and acquired capabilities. Acceptance of individual inequality means that certain individual characteristics (including inborn ones) of differentiation are subjected to social evaluation. What probably is not accepted is social evaluation of ascribed statuses that arise from primordial group identity. In other words, equality of opportunity in effect accepts rating or social evaluation of some differences (such as natural talents and abilities, and acquired skills and capabilities of individuals). Those who are rated higher on these characteristics or individual endowments may have better access to statuses that are rated higher. This is the paradox of the notion of equality of opportunity, viz, it treats all individuals as equal (human beings) and, at the same time, it is operated on the basis of its opposite, viz, all individuals are unequal (in their capabilities). However, if equality of opportunity enables those who have been deprived of societal

resources on account of their ascribed statuses to acquire the scarce resources, then it can result in the redistribution of resources in their case. In such instances, it is presumed that, since the constraining factors of ascriptive identities are removed, individuals on the strength of their capabilities will acquire new positions. If and when this happens, equality of opportunity contributes to economic equality (or reduction in inequality) to that extent

Equality of opportunity seeks to ensure that no individual is unfairly deprived of her/his chance to have access to societal resources for acquiring higher statuses, or that every individual is given a fair chance to acquire them. What is fair or unfair is relative and depends on societal definition. For instance, within the pure strict notion of equality of opportunity, social rating of individual differences (i.e. inequalities) is fair, while that of group differences is unfair. In so far as equality of opportunity seeks to make ascriptive factors irrelevant to the acquisition of societal resources, individuals are supposed to acquire them on the strength of their abilities, or rather, individuals achieve them or receive them as rewards they deserve or merit. Equality of opportunity, therefore, accepts competition for societal resources wherein distribution of resources is based on the individual's achievement (that is dependent on impersonal individual endowments). This form of distribution of resources based on equality of opportunity is known as meritocracy.

Meritocracy, based on the concept of equality of opportunity, has found wide acceptance in modern societies. However, it has had its drawbacks, too, from the point of view of social equality. The first question is to what extent the actual distribution of societal resources

under meritocracy takes place on merit basis and is free from ascriptive factors. In other words, has meritocracy replaced ascription with achievement in the distribution of societal resources? The second issue is regarding the social order that is the product of meritocracy. To what extent is the social differentiation resulting from the merit-based distribution of societal resources morally right? In other words, is inequality based on meritocracy justifiable? Debates on these issues surrounding meritocracy have been unending. They indicate that equality of opportunity or meritocracy is not an incontrovertible solution to the problem of social inequality. Equality of opportunity, the underlying principle of meritocracy, in reality means none—discrimination on the basis of ascriptive criteria in the matter of access to resources and not social equality in result or actual redistribution of resources. Another issue emerging out of the merit-based distribution of resources (which results in inequality) is whether the unequal distribution of resources as deserving rewards (on account of meritorious achievement) is morally justifiable. “Desert is not the only criterion thought relevant to the distribution of resources — for example, needs and rights are also often invoked; and it would, moreover, appear that even in terms of desert a majority would still regard existing inequalities as too extreme” (Goldthorpe, 1997:675)⁸. However, despite the drawbacks, meritocracy remains a socially and morally acceptable principle in modern society. J. H. Schaar observes that rejection of meritocracy would open the door for all kinds of discriminatory practices in education and employment. He, therefore, treats meritocracy as a “necessary myth” (Goldthorpe, 1997: 676).

The critique of equality of opportunity and meritocracy shows that they offer equal chance for access to resources to individuals who are unequal in their potential to actually acquire the resources. The result is obviously inequality (maybe, of a different kind). In this context, the concern for equality in results has led some societies to introduce the system of representation (or reservation) on the basis of (primordial) group identity as a means to achieve social equality or equitable distribution of resources. The concept of equality (or rather equity), which underlies this system for fairer distribution of resources, does not go along fully with the concept of equality of opportunity under liberalism. While the industrial economy and liberal philosophy contributed to the emergence of equality of opportunity and meritocracy as an acceptable system of resource distribution, socio-political processes have led to the introduction of representation or reservation based on ascriptive group identities as a criterion in the distribution or redistribution of societal resources. But the concepts of equality of opportunity and meritocracy are still relevant and operational in the access to, or distribution of, societal resources. Modern society has not devised a system that can satisfactorily replace them altogether. But their function has been variously regulated by the socio-political concept of equity (which recognises primordial group identities as relevant criteria in providing access to, or distributing, societal resources) and the socio-economic context (wherein primordial group identity and market factors continue to affect distribution of resources in different ways). While the industrial economy relied on equality of opportunity and meritocracy in the differential distribution of resources and rewards, the political ideologies of the post-industrial situation have redefined the concept of social equality and reformed the system of distribution of societal resources.

With the concepts of individual centered equal opportunity and meritocracy, and group-based equity (or reservation) remaining operational, societies like India present a mixed system of resource distribution based on a highly complex concept of social equality. It is a system of equality of opportunity and meritocracy (based on the recognition of difference in individual capabilities) and at the same time regulated by a system of equitable distribution of resources (based on the acceptance of ascriptive group inequality in access to resources). The emerging situation is considered to be fairer or less unequal, although the distribution of resources continues to be dependent on differences in individual capabilities and affiliation to socio-culturally differentiated groups. Individuals belonging to the upper Sections (by virtue of the group affiliation) and those from the protected groups (by virtue of representation) may have the advantage over others in the competition for resources. But it may not be individual capabilities and affiliations to relevant groups that largely or critically provide the access to societal resources in individual cases. While these factors are important, what finally accounts for access to the resources seems to be a complex mix of known and unknown factors, including luck (Bell, 1977: 620). Whether the societal resources are distributed or redistributed on the basis of equality of opportunity (or giving each one according to capability) and/or equity (or giving each one according to need), the emerging social order is bound to be unequal. In accepting a system of distribution as justifiable in a society, it is important that the social order be considered by socio-political evaluation to be less unequal. The realistic goal in the pursuit of social equality would be another order of inequality (which is considered more acceptable or less unequal). It is possible to enter into a (probably

non-conclusive) debate on whether the differential form of competition (reservation) and the very merit-based competition promote or violate the principle of equality of opportunity. It is necessary for society to have an acceptable system of distributing scarce resources. The very concepts of equality and merit are subject to societal judgment. Within the context of the meanings of institutionalised values, each society adopts an acceptable system of resource distribution in accordance with those values.

As social institutions in interaction with each other, social stratification and education have mutual impact. In its impact on the educational system, the stratification system is seen to affect the individual's access to and performance in education. Individuals belonging to the lower sections of society are found to be lagging behind their upper section counterparts in the matter of entry in the formal system of education and performance in actual learning. At the same time, education is looked upon as a potent factor that has some impact on the stratification system in so far as education can contribute to improvement in the status of the individuals. Obviously, education can have its impact on stratification only when the impact of stratification on education is controlled or regulated to the effect that the individuals of the lower sections of society are enabled to have access to education, and thereby achieve change in their social status. Thus, the interaction between education and stratification can be understood in terms of two main issues, viz, inequality in education (as the impact of stratification on education) and equality through education (as the impact of education on stratification).

5.3 INEQUALITY IN EDUCATION

Those who belong to the socially and economically backward sections of society, the poor and the disadvantaged minorities in all societies, are found to be relatively deprived of education as compared to their upper class and majority community counterparts. These disadvantaged sections suffer from lack of access to and drop out from formal education. Those who manage to enter the formal system of education and stay on, tend to have low achievement in the learning process. What the children have acquired from the process of socialisation within their family and community provides the base appropriate for the kind of learning offered in the formal system. The capital (knowledge, skills, values, attitudes and behavior patterns) the children of the disadvantaged groups carry with them may be unsuited, irrelevant or inadequate to meet the requirements of the system of formal education. The status roles in the formal educational institutions are generally defined as per the cultural traits of the upper sections of the society. In most cases, the teachers themselves are from the upper sections of society. The contents and methods of the teaching—learning process are likely to suit the upper sections, the traditional beneficiaries of the formal system. For instance, in most societies, the language of the minorities or the disadvantaged groups is neglected in the formal educational system. The upper sections of society are in an advantageous position to benefit from the teaching-learning process that is based on their own language. It is, therefore, much easier for the children from the upper sections to respond to the demands of the formal system of education and to adjust to the formal classroom situation. For the very

same reason, the lower sections of society (first-generation learners in particular) find it difficult to cope with the demands of the formal system of education.⁹ Consequently, the poor tend to record lower levels of achievement in education or drop out without completing the course. Thus, social stratification has its impact not only on access to education, but also on learner achievement.¹⁰

A manifestation of the impact of social differentiation on education in some societies like India is the division of educational institutions on the basis of the social differentiation of the student population. Vast differences in the quality of education are found between the educational institutions that serve the upper and lower sections of society in most democracies. Educational institutions attended predominantly by the upper sections have better infrastructure facilities, and human and none-human inputs so that they provide qualitatively better education. Consequently, students from the upper sections who attend these educational institutions are in a position to have higher learner achievement, the immediate function of the teaching-learning process in the educational system. To that extent, social differentiation existing in the larger society is being replicated in the educational system. As the children go through this dual system of education, they get confirmed in their socialisation into the dual social system outside the educational system. Children enter the educational system with a difference in their capabilities (socio-cultural capital) to benefit from the teaching-learning process in the educational system. In addition, the difference in the quality of education available in the educational institutions they attend affects the level of their performance in the learning process. In other

words, they are likely to have differential (or lower) levels of learner achievement in the educational system. Difference in learner achievement means difference in the chance for occupational placement or social mobility, one of the ultimate functions of education for the individual. Thus, the interaction between the systems of social stratification and education, which affects the learning of individuals, operates in a vicious circle and exists in different degrees in different societies¹¹. The above discussion on the interrelationship between stratification and education shows that the educational system presents inequality of two forms. First, difference in the socio-cultural capital possessed by the students contributes to unequal access to and performance in education. Second, the dual system of education, wherein unequal packages of educational services (in terms of human and non-human inputs in the educational institutions) are provided to beneficiaries endowed with unequal socio-cultural capital, contributes to inequality in learner achievement. This form of inequality within the educational system is more or less parallel to the system of social differentiation existing outside the educational system. Hence maintenance or reproduction of the system of social differentiation (or inequality) existing in the larger society is at times attributed to education as its function. However, it would be inappropriate to speak of reproduction or reinforcement of social inequality as a function of education problem here. Existence of inequality within the educational system is more the impact (or function) of social stratification on education than the function of education on stratification. Stratification is an inevitable part of the social context in which the educational system functions.

5.4 ECONOMIC EQUALITY THROUGH EDUCATION

Education is considered to have the potential to effect change in the system of social stratification. But it needs to be reiterated that the educational system exists within the social situation of which the system of stratification is a constituent part. Education does not do away with inequality. In the interaction with social stratification, education at best may contribute to alter the nature or extent of inequality in appropriate situations. It is in this limited sense that the function of equality (or equity) or change in the prevailing unequal system of social differentiation is attributed to education. The equality or change in the system of social differentiation envisaged here is in the form of the change experienced by individuals from a relatively low social status to a higher one by virtue of the immediate and ultimate functions of education. Where education itself is a criterion of social rating of status, any level of education acquired by an individual contributes to enhancing her/his economic status. To the extent that education raises one's status, it can be perceived as performing a function of equality, viz. improving the status or reducing the extent of inequality. Occupation and/or the economic return from education is a very important criterion of social status. Occupational status is often equated with social status, especially in a society where achieved status is accepted as the criterion of one's social position. In so far as education enables an individual to assume occupations that are rated higher, education is considered to have the function of social (or occupational) placement and/or social mobility. It is in this sense that one speaks of education as a means of achieving equality or reducing inequality (or in reality changing the existing distribution of individuals on the hierarchy of social statuses). Raising

the status of the individuals who are lowly placed in the social hierarchy means changing the nature of the existing system of social inequality or a change towards equality (or a less unequal system).¹² Occupational placement and social mobility as ultimate functions of education are dependent on the immediate function of learner achievement. Acquisition of the knowledge, skills, attitudes and behavior patterns appropriate for occupational positions transmitted through education is a pre-condition for its functions of social placement and social mobility. This is why when one speaks of equality through education; one is concerned about equality in access to as well as achievement in education. Obviously, those who are disadvantaged on account of social differentiation in the first place should have access to education or be enabled to enter the educational system. It is equally important that they attain a satisfactory level in learner achievement, viz, learn what is taught in the educational system. Thus, when one speaks of equality and education, it may refer to equality in access to education, equality in learner achievement and/or equality in social placement/mobility (or educated employment). When the relatively lower sections of society have access to education in large numbers, perform satisfactorily in learner achievement and thereby get into higher occupational positions, the nature of the existing social differentiation may change towards a more equitable distribution of societal resources. If the resulting change in economic status reduces the extent of inequality, it may be understood as a process towards economic equality. In this manner, it makes sense to speak of education as a means of pursuing the goal of equality.

In attributing to education a contributory role towards equality, it is presumed that interventions to deal with the deterministic impact of

the stratification system on the educational system are possible so that the educational system is not totally at the receiving end in its interaction with the stratification system. As already mentioned, social stratification and education function in a vicious circle so that inequality in education reflects the social differentiation outside the educational system and vice versa. In such a situation, education cannot play its potent role of changing social status without the socio—political intervention that regulates the impact of social stratification on education. Action for regulating the impact of stratification on education should enable individuals of the lower sections of society to have access to education, perform satisfactorily in the learning process and achieve occupational status by virtue of the education they acquire. It should also deal with the influence of ascriptive factors on access to education, so that no individual is discriminated against in education on grounds of primordial identities or personal disabilities. It is in this perspective that the socio—political intervention in the form of special educational schemes, reservation in access to education and remedial programmes for the deprived sections of society, and institutionalisation of the general principle of equality of opportunity in education is to be understood. The objective of these measures is to enable the relatively disadvantaged to achieve a satisfactory level of access to and performance in education, the two basic issues of equality within the educational system.

5.5 GOAL OF EQUALITY

In the sphere of social stratification, education has been accepted as an important means of achieving the goals of equality and justice enshrined in the Constitution of India. It has been realised that practices

of discrimination, injustice and exploitation cannot be removed by enacting legislation alone and that a change in the attitude of the people is necessary. Education plays its role in changing the attitude of people when it inculcates the appropriate knowledge and values. Today, a lot of emphasis is given to educating the masses to acquire certain basic knowledge, values and attitudes that are required for creating a social situation of equality and justice. Concepts such as social awareness have been used in this context. It is this development perspective that prompted the policy makers to include social awareness and functionality as contents of adult education in India in addition to literacy. Education for liberation or empowerment of the discriminated sections of society has become a programme of action towards social development in India. For instance, the National Policy on Education (1986) speaks of empowerment of women through education.¹³ The role of education in this context is perceived to be that of providing the value-knowledge base for inter-personal and inter-group relationships (such as those based on equality and justice) that are considered to be desirable or in accordance with a better system of social order. Obviously, the value-knowledge base by itself would not bring about social development in the form of change in the social order. However, education through the inculcation of the value-knowledge base makes its own contribution which gets realized when it is utilized (or people behave in their interaction with individuals and groups in accordance with the knowledge and values).

An educational scheme that has been introduced as a direct development measure in India is the programme for the welfare of scheduled castes and scheduled tribes. It is a scheme that is based on the theoretical position that education, in so far as it equips the individual

with knowledge and skills for social placement and mobility, functions as an "equalizer" (or to raise the social status). It is designed to intervene in the situation of influence exercised by the stratification system on education so that education does not reproduce the existing stratification system as pointed out by scholars.¹⁴ The special Programmes for the education of the scheduled castes and scheduled tribes include reservation of seats in institutions of higher education and incentives such as scholarships and free books to enable these weaker Sections of the society to benefit from education and thereby improve their social status. These measures have been recognised as development oriented programmes for realising the goal of equality (or equity). But it needs to be reiterated that what really contributes to development is the acquisition of knowledge and skills on the part of the individuals belonging to the weaker sections of the society and not merely their enrolment in educational institutions. While reservation and the different incentives may be accepted for promoting education of the weaker sections of the society, education can play its contributory role of development (or equaliser) only if the weaker sections obtain an adequate level of achievement in education. It seems that the welfare programmes in education so far have been focussed on enrolment and have not paid adequate attention to achievement in learning among students from the weaker sections of the society (Aikara, 1996).¹⁵ It may also be pointed out that successful education of the weaker sections of the society need not necessarily result in equity because education by itself does not guarantee occupational placement and enhancement of social status. Education can only make its contribution of equipping the individual with the knowledge and skills for occupational placement.

Actual achievement of occupational placement is dependent also on factors other than education.

The socio-political scheme of representation or reservation in jobs has been instituted in India as a measure to help the educated among the weaker sections achieve occupational mobility and thereby to have some impact on the stratification system in the country. Obviously, it has facilitated occupational placement of the educated from the weaker sections. However, from the point of view of change in the stratification system through equitable distribution of resources, the question may be asked to what extent the results of the scheme have contributed to the realisation of the goal of equity. Special facilities and programmes have enabled several members of the weaker sections to acquire education and get into occupational positions that were traditionally inaccessible to them. In so far as education has been instrumental in making inroads into this structure of exclusion (however low may be its degree), education can be credited with some contribution towards affecting the stratification system. Since social differentiation cannot be altogether eliminated, what is possible in the pursuit of equality is to bring about changes within the stratification system. Whether the emerging new form of stratification will be more acceptable from the point of view of the value of equality will depend on the societal evaluation. In the case of the weaker sections in India, the welfare programmes in education have at least reduced the level of their exclusion from educational and occupational positions. But the process is giving rise to a form of stratification that is creating increasing differentiation within the weaker sections themselves. The schemes have benefited the relatively advanced sections or groups among the weaker sections and have hardly

reached the lower sections. As a result, new forms of inequality in access to resources (including education and occupation) have emerged within the weaker sections)¹⁶ perspective of development is that there has been an overemphasis on higher education. It has contributed to production of an elite within the weaker sections. It is mass education more than elite education that contributes to the overall development of the relatively deprived communities. From the point of view of development, higher education should have a strong base of elementary education for the masses (Aikara, 1996: 12-13). Education, aided by the scheme of reservation in jobs, has contributed to making some impact on the relative exclusion of the weaker sections from certain higher rated occupations. This is indeed an impact on the stratification system. The question is whether the emerging system of stratification can be accepted as more desirable from the point of view of social development.

CONCLUSION

Economic Equality through education as a means of bringing about change in the economic system. This is possible only when equality (or reduction of Inequality) in education is achieved. Education can make its contribution to equality, when individuals and different sections of the society have access to education and obtain reasonably good achievements in the learning process the immediate out come of education

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