

EXECUTIVE SUMMARY

Introduction

This report contains the results of an Equality Impact Assessment of proposals for changes to the arrangements for financial support for students, carried out by the Department for Employment and Learning DEL (formerly known as the Department of Higher and Further Education, Training and Employment) under the terms of its Equality Scheme.

Background

A Review of student finance in Northern Ireland was initiated by the Minister for Employment and Learning, Dr Sean Farren MLA, in February 2000. The scope of the Review included the financial support arrangements for both undergraduate Higher Education and Further Education and covered both full-time and part-time students. The objective of the Review was to develop greater equality of opportunity and promote lifelong learning, in the interests of economic competitiveness and social inclusion as well as the pursuit of learning, through increasing participation in both FE and HE.

The Review process involved an initial, wide-ranging consultation with interested individuals and groups, including student representatives, the universities and FE institutions. Some 55 written responses were received and oral evidence taken from 10 bodies directly engaged in higher and further education. The Assembly's Employment and Learning Committee submitted its own report and recommendations for change.

Proposals for Change

As the outcome of the Review, Dr Farren, with the endorsement of the Executive, announced a package of proposals in March 2001, representing an additional investment of over £20m in a full year, and designed to provide greater equality of opportunity and greater equity of treatment for those from poorer backgrounds and to widen access and increase participation in FE and HE from those groups and individuals that are currently under-represented.

The main elements of his package of proposals are:

In Higher Education

- The raising of the tuition fee threshold to a residual income of £20,000 pa;
- The introduction of means-tested non-repayable bursaries of up to £1,500 pa for full-time undergraduates whose personal or family residual income is below £15,000 pa;
- The introduction of a childcare grant for those students on low incomes with dependent children; and
- An increase in domestic HE places by 1,000 over three years.

In Further Education

- The abolition of tuition fees for those over 19 on full-time vocational programmes;
- The introduction of discretionary Access Bursaries on the same basis as for HE; and
- An increase in Access (Support) Funds by £0.5m pa.

Equality Impact Assessment

As required by the Department's Equality Scheme, DEL conducted a Preliminary Impact Assessment, followed by a comprehensive equality consultation to determine whether the Minister's proposals contained any elements which would have a direct and adverse impact on the equality of opportunity for the nine groups identified in section 75 of the Northern Ireland Act 1998. In addition to responses from the consultation process, the Department considered a wide and comprehensive range of quantitative and qualitative data. However, relevant information is not currently available on all nine groups. The Report discusses the issue of data unavailability and measures that are being put in place to ensure future collection.

The equality consultation process was initiated in April 2001 with a closing date of 15 June 2001. Comments were received from 16 bodies. The majority of respondents welcomed the proposals, however, a number of returns contained:

- Criticisms of the consultation process undertaken by the Department and, in particular, the consultation document;
- Suggestions for additional changes which respondents would have wished the Minister to include within his proposals; and
- Identification of potential areas of adverse impact within the actual proposals.

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The Department has indicated that, in its view, it complied with central guidance on the evolving equality assessment process available at the time, but it has undertaken to discuss further aspects of the process with the Equality Commission.

The Minister will consider suggestions for additional further changes raised by respondents in time for the Spending Review 2002/03.

Potential Adverse Impacts of Proposals and Departmental Response

The Department's analysis of the proposals, supported by some respondents, identified the following potential areas of adverse impact.

Persons of different religious belief

- It was considered that the use of a means test for tuition fee contribution, bursaries and childcare grant and related changes to loan may impact adversely on Protestants because of their higher income levels.

The Department considered alternative approaches but decided to retain the proposals which are in support of New TSN.

- It was noted that the loan system could have an adverse effect on some Moslem students whose religious beliefs did not support loans.

The Department's consideration of alternative approaches concluded that changes could only be made at excessive cost, and, if implemented, might create inequality for a far greater number of students.

Persons of different age

- A potential adverse impact on over 55s was identified in respect of student loans and supplementary grants.

The Department considered that it had no option but to retain the arrangements for loan availability, but will extend eligibility for the supplementary childcare grant to those aged over 55 by September 2002.

- The requirement for 50-54 year olds to prove their intention to return to work after receiving a student loan.

The Department will draw this issue to the attention of the UK group considering the social security dimension of student support.

Persons of Different Gender

- The targeting of new HE places on skill areas of science, engineering and technology, which are predominantly male orientated, may have an adverse impact on women.

The Department will adopt wider access as a factor in the allocation of places and will consider how to attract more women to enter courses in the necessary skill areas.

- The introduction of a childcare grant may potentially impact adversely on men.

The Department will ensure that there is equality of opportunity within the scheme, but does not wish to restrict the opportunities, especially for women who are lone parents, to enter HE.

- The repayment of loans may impact adversely on women due to differential salaries.

The Department will seek information on this issue from the Student Loans Company and the Inland Revenue.

Persons with Disability and Persons without

- The focus of fee abolition and bursaries in FE on full-time students may have an adverse effect on people with a disability, because the part-time mode was a more likely access route for this group.

The Department has other support mechanisms in place for disabled students and Individual Learning Accounts are available for certain part-time courses. The Department will, however, consider the issues raised in taking forward the Bill on disabled access to third level education.

Conclusions from Equality Impact Assessment

The Department has subjected the proposals, which are very complex and inter-related, to a rigorous assessment of their equality impact on the nine groups identified in Section 75 of the Northern Ireland Act. This assessment has been informed by an equality consultation seeking views from outside the Department, especially those with a direct interest in and knowledge of the relevant issues.

The Minister has considered carefully the views expressed during the consultation. Having balanced the various opinions proffered, having considered alternative and mitigating approaches and having taken into account the wide range of implications involved the Minister has decided to take forward his proposals with the undertakings and changes set out above.

RESULTS OF THE EQUALITY IMPACT ASSESSMENT

1. INTRODUCTION

1.1 The Department for Employment and Learning's Equality Scheme was approved by the Equality Commission on 15 April 2001. This committed the Department to making publicly available the outcome of any equality impact assessment. The purpose of this paper is to publish the results of the Department's equality impact assessment of the Minister's Student Support proposals in line with Stage 6 of the Commission's Equality Impact Assessment (EQIA) process. The structure of the paper is based on that recommended by the Equality Commission in its "Practical Guidance on Equality Impact Assessment". Section 1 provides an introduction. Section 2 of the report provides details of the background to the student support policy, identifies the policy aims, context, scope and refers to the data sources which informed the policy review process. Section 3, Data Collection and Consultation, identifies and describes the main sources of information which were used to conduct the equality impact assessment. Section 4, sets out the Key Findings and provides an assessment of the equality impact of the new student support proposals across the nine equality categories. In the case where an adverse equality impact is identified, it considers alternative options or proposals for mitigation. Section 5, Conclusions, sets out the conclusions of the process and the decisions of the Minister. It also provides details on the monitoring and evaluation of the policy, particularly with regard to the equality impact.

1.2 Section 75(1) of the Northern Ireland Act 1998 requires public authorities, in carrying out their functions relating to Northern Ireland, to have due regard to the need to promote equality of opportunity between certain different individuals and groups, namely:

- between persons of different religious belief, political opinion, racial group, age, marital status or sexual orientation;
- between men and women generally;
- between persons with disability and persons without; and
- between persons with dependants and persons without.

1.3 In addition, without prejudice to the above obligation, DEL should also, in carrying out its functions relating to Northern Ireland, have regard to the desirability of promoting good relations between persons of different religious belief, political opinion or racial group.

- 1.4 The primary function of the Equality Impact Assessment is to determine the extent of differential impact upon the relevant groups listed above and to determine whether the impact is negative on these groups or individuals, the extent of this impact and whether this can be justified in policy terms. This assessment has to be set out in a context where the proposals are designed, from the outset, to provide greater equality of opportunity and greater equity of treatment for those from poorer backgrounds and represent an additional investment of over £20m in a full year to assist that extension. The Department's student finance proposals are specifically focused at providing greater assistance to students from low income family backgrounds and are designed to ease any practical or perceived financial barriers to entering further or higher education (HE/FE), part-time or full-time. The Department's proposals are intended to widen access to and increase participation in FE and HE from those groups and individuals that are currently under-represented.
- 1.5 Underpinning the Department's proposals is the intention to address problems related to the income background of students and potential students. It is inevitable, however, that some groups or individuals may benefit more and some may benefit less, depending on their income, background and personal circumstances.

2. BACKGROUND

Introduction

- 2.1 The Review into Student Finance in Northern Ireland was announced by the Minister for Employment and Learning, Dr Farren, on 10 February 2000. It was conducted by DEL officials and encompassed a widespread consultation exercise, including presentations from those bodies most closely involved in student support such as the NUS/USI, the universities and FE Institutes. The scope of the Review was to include the arrangements for both undergraduate Higher Education and Further Education and to cover both full-time and part-time students. The Minister, with the full endorsement of the Executive, announced the detail of his proposals in March 2001.
- 2.2 The main aims of the new student support proposals are social, economic and educational and may be expressed as follows, to:
- widen access to further and higher education, especially to HE places in Northern Ireland, and to provide greater equality of opportunity and greater equity of treatment by reducing the barriers to participation and retention for those from lower socio-economic groups;
 - increase the contribution which HE and FE make to economic development in Northern Ireland and, in particular, the enhancement of the skills base; and
 - promote lifelong learning through increasing participation in both HE and FE.
- 2.3 The Terms of Reference for the Review are set out in Annex 1 and the Minister's proposals are set out in Annex 2.

Policy Context

- 2.4 In Higher Education, the present arrangements for student support were determined by the UK Government in 1997. The Government's announcements followed, in time but not in recommendations, the 2-year UK-wide review carried out by the National Committee of Inquiry into Higher Education under the chairmanship of Sir Ron Dearing. In terms of Further Education, the main resource available for student support comes from the funding of discretionary awards by the Education and Library Boards.
- 2.5 Since 1998, there has been additional change to the student support system in the UK. The student support arrangements in Scotland, have changed with the tuition fee contribution in higher education being replaced by a Graduate Endowment to be paid after graduation. In addition, in Scotland, bursaries have been introduced in HE for those on low incomes and other measures have been put in place to facilitate access to HE by those from certain targeted groups. The results of a review of student support arrangements by the Welsh Assembly have just been announced. For their part, Ministers in England have decided to retain the current arrangements for tuition fee contributions in higher education and are adopting a range of measures to provide targeted support for particular disadvantaged and under-represented groups.

- 2.6 Further and higher education are increasingly important in Northern Ireland as agents for sustaining and increasing economic development. The regional economic role of the universities was emphasised by Dearing in his review of higher education and the growing economic importance of further education was defined clearly in "Lifelong Learning: A New Learning Culture for All" (1999) and in Strategy 2010 (published in 1999). These both supported increased participation in third level education and the widening of access to such education from those previously under-represented. In defining the importance of the knowledge-based economy they also confirmed the provision of highly skilled people as a central role for both the further and higher education sectors. Skills provision and economic development were, in consequence, essential contextual elements of the review.
- 2.7 The Executive is also committed to greater social equality, in particular, through New TSN. The first New TSN Annual Report was published in November 1999 and focused on targeting resources and assistance, at those people who are in social need. DEL has published its New TSN Action Plan which includes, inter alia, the objectives of widening access to HE and FE by the socially disadvantaged, the socially excluded and significantly increasing adult participation in vocational education and training. New TSN has a particular focus on tackling the problems of unemployment and on increasing people's knowledge and skills so that they are motivated and feel more confident in accessing whatever employment opportunities are available to them. New TSN therefore formed an important strategic context for the review of Student Support.
- 2.8 The Programme for Government provides the most recent strategic context for the work of the Executive. In terms of "Making a Difference" it promotes the concept of a cohesive, inclusive and just society where "everyone enjoys equality of opportunity whatever their own personal background". It commits the Executive, through New TSN, to redirect resources and efforts "towards people, groups and areas in greatest need". In "Education for All" its aim is to allow everyone "to fulfil his or her personal development". DEL is charged by the Programme of Government with increasing participation in HE and FE, widening access to HE and FE from among the under-represented in meeting skill needs in order to foster social inclusion and to develop Northern Ireland's human resources for economic purposes. The Student Support Review was conducted within this strategic context which promotes greater equality of opportunity for social and economic purposes.

Data which have Informed the Policy

- 2.9 During the policy review process a wide and comprehensive range of quantitative, qualitative and consultative data were carefully examined. The consideration of this information was instrumental in the identification of the need for change and the ultimate determination of the new policy proposals. The main sources are summarised below.

Quantitative Data

HE and FE Enrolments. DEL collects information on an annual basis on enrolments in HE and FE and this has been examined carefully as part of the policy review process. Summary enrolment statistics are attached at Annex 3.

Income Data. Information on household income levels in Northern Ireland as sourced from the Family Expenditure Survey was examined.

School Leavers Survey. The Department of Education's School Leavers Survey identifies students who are entitled to Free School Meals and this was cross-referenced to students examination performance and the probability of enrolling in HE.

The Labour Force Survey. Identifies the proportion of the population of working age who have no qualifications.

Qualitative Data

Work by Osborne, Cormack, Gallagher and others in the 1990s provided a valuable quantitative and analytical framework on the religious and social nature of the student body in Northern Ireland and on the issues surrounding the migration of so many young people for their higher education.

Metcalfe (1997) reflected on the differences in participation in university education between those students from the higher socio-economic groups and students from the lower socio-economic classes.

Callender C. and Kemp M. (2000) outlined the current patterns of student income and expenditure and drew attention, in particular, to the difficulties faced by students from social classes IV and V, who were most likely to have taken out a loan and had taken out the largest loans; worked longer hours than their better off peers; and were provided with less financial support from parents. The survey found also that debt aversion is concentrated among those from the lower social classes.

The Northern Ireland Skills Monitoring Survey (2000). This survey identified the existence of 'skill gaps' among both applicants for employment and existing employees in certain priority skills areas.

Harmon C. and Walker I. (2000) noted that increasing the education of some can have benefits in terms of increasing the productivity of others, suggesting that there are wider economic benefits associated with education. They take the view that the sustained high rate of return to education would indicate the existence of barriers to Higher Education and suggest that there is a case for expanding provision of HE in Northern Ireland.

Consultative Information

2.10 As part of the review of student support the Department conducted a comprehensive consultation exercise. The written consultation process and the follow-up presentations gave rise to a number of clear messages. The consultation elicited responses from a number of institutions and organisations with a good knowledge of and interest in the student support arrangements. Many of the responses received corroboration from evidence of the existing system and its impacts.

Generally, the returns from the consultation highlighted a range of concerns, including:

- concerns over the adequacy of the current amount of loan for living costs;
- support for bursary provision for mature students, lone parents, those with dependants and for FE students over 19;
- greater support for part-time students;
- moves to greater parity of support for FE students;
- support for research into the income and expenditure patterns of students in NI;
- support for a review of the link between student support and the benefits system;
- a call for additional HE places within NI; and
- support for simplification of the application process.

The Proposals

2.11 Given the terms of reference and aims of the Review, the strategic context within which it was conducted, the returns from consultation and consideration of the data, the Minister set out a range of proposals for change to the current arrangements for HE and FE student support which are attached at Annex 2.

2.12 The policy intention is to widen access to HE and FE to those from lower socio-economic backgrounds; to provide greater equality of opportunity and equity of treatment for students from those backgrounds; to increase participation and promote lifelong learning and to enhance the skills base. The Minister has proposed, in HE, to raise the threshold for fee contribution to a residual income of £20,000 pa; to introduce means-tested non-repayable bursaries of up to £1,500 pa for full-time undergraduates whose personal or family residual income is below £15,000 pa; to introduce a childcare grant for those students on low incomes with dependant children; to reduce the loan available to those on incomes over £46,000 pa by up to £250; to extend Individual Learning Accounts to vocationally relevant part-time HE courses; to increase domestic places by 1,000 over three years and to improve the information and guidance available to students, especially mature students. In FE, the Minister proposes to abolish tuition fees for those over 19 on full-time

vocational programmes; to introduce discretionary Access bursaries on the same means-tested basis as for HE; to increase Access (Support) Funds by £0.5m and to introduce a consistent fee remission policy for part-time students across the sector. In addition to these changes the Minister wishes to re-engineer the administrative system for student loans.

- 2.13 This document considers whether the changes to student support decided upon by the Minister contain any elements which would have a direct and adverse impact on the equality of opportunity for the groups identified in Section 75 of the Northern Ireland Act 1998.

3. Data Collection and Consultation

- 3.1 The information upon which this Equality Impact Assessment is based has been drawn from a wide and comprehensive range of sources. The following identifies and describes the main information sources which were considered. They are split into three broad categories: quantitative data; qualitative data; and responses to the consultation process. However, relevant information is not currently available for all nine equality categories. The issue of data unavailability and the measures that are being put in place to ensure future collection are discussed below.

Quantitative Data

- 3.2 A summary of the quantitative information collected as part of this equality impact assessment is included at Section 4 of this report. The main sources are as follows:

Participation in HE and FE

Higher Education Statistics Agency: The HESA database contains information on students, staff and finance at the HE Institutions in the UK. Information is collected by the institutions and returned to HESA. DEL holds information on NI Institutions and on NI domiciled students studying HE in GB. The individualised student record contains information on a student's total programme of study from enrolment to qualification and contains both student and programme related data. It also contains a substream on the First Destinations of Students gaining qualifications from Higher Education Institutions.

Further Education Statistical Record: The FESR database contains information on course enrolments in the Further Education sector. Information is collected by DEL from the college management information systems. Historically the return was a snapshot of enrolments on 1st November each year but DEL now also collects information on a 'whole year' basis. The FESR return includes all vocational and academic enrolments on Higher and Further Education level courses in the 17 Institutes of Further and Higher Education in NI.

Further Education Leavers Survey: The FELS return contains information on all leavers from the Institutes of Further and Higher Education in NI. Leavers are defined as those in the final year of their programme of study. The purpose of the return is to record achievement of full or partial success by all those on all vocational and academic courses.

The following examines the extent to which each of the three HE/FE databases provides information across the nine equality categories.

Age	Information excellent for all three (HESA, FELS and FESR) data sets.
Gender	Information excellent for all three data sets.
Marital Status	Information was first sought for FESR and FELS from 1999/2000 and it is still too early to assess the coverage and response rates attained. Currently HESA do not collect marital status.
Religion	Community background information is collected. Coverage in FESR and FELS is good although there are a significant proportion of people who refuse to state their community background. In the HESA data information on community background is only sought from NI domiciled students.
Racial Group	Ethnicity (as opposed to race) is collected for all 3 data sets and the coverage in each is good.
Disability	Information is collected for all 3 data sets but relies on declared disability. Often a student will not declare an 'unseen' disability if they feel that it will not impede their studies.
Dependants	Information was first sought for FESR and FELS from 1999/2000 and it is still too early to assess the coverage and response rates attained. Nil response assumes that there are no dependants whereas the student may simply be declining to declare the information. Currently HESA do not collect data on dependants.
Political Opinion	Information is not collected for any of the 3 data sets because of the sensitivity associated with eliciting such information.
Sexual Orientation	Information is not collected for any of the 3 data sets because of the sensitivity associated with eliciting such information.

Income data

- 3.3 Elements of the new student support proposals will, for the purposes of eligibility, require the application of a means test. Consequently, the Department has examined data from a range of official sources to provide an evidence base to assess whether means testing is likely to have a differential and adverse impact across the equality categories. These data sources are as follows:

The New Earnings Survey. The Department of Enterprise, Trade and Investment (DETI) collects earnings data annually for NI employees who are members of the Pay As You Earn tax scheme. The Department has considered information from this database on earnings by gender and by age.

The Labour Force Survey. The Department of Enterprise, Trade and Investment (DETI) collects a range of information on the characteristics of the Northern Ireland labour force via this sample survey. The Department has used information from this database to examine earnings by marital status, disability and by those with dependant children. However, because of sample size, reliable earnings information is not available by racial group.

The Northern Ireland Family Expenditure Survey. This is a sample survey which is conducted by the Central Survey Unit throughout the year. It gathers information on household spending patterns and income together with demographic and socio-economic characteristics. The Department has considered data from this source to identify income levels by religion.

Currently reliable data is not available on earnings/income by racial grouping because of small sample size. However it is possible that the 2001 Census of Population, when published, could be used to identify racial grouping by social class. In addition there is no official source for earnings or income data by political option or sexual orientation due to the sensitivities associated with its collection.

Other Quantitative Data

- 3.4 The Continuous Household Survey. The CHS is an annual sample survey which provides a wide range of socio-economic and demographic data on Northern Ireland households and individuals living with them. In order to analyse the equality impact associated with the proposed introduction of the new childcare grant, the Department has considered data from this source. In particular, the Department has examined the number of households with dependant children that are headed by a couple, a lone mother or a lone father.

Qualitative Data

- 3.5 The Department has considered data from a wide range of recently published sources to assess the needs of existing and potential students. This information also provides a basis for the consideration of the equality impact of the new student support proposals. The main evaluative studies which are relevant in this context are listed and described below.

Callender C. and Kemp M. (2000) *“Changing Student Finances: Income, Expenditure and the Take-Up of Student Loans Among Full-Time and Part-Time Higher Education Students in 1998/99”* DfES. This UK study provides information on HE student income and expenditure split by age, gender, dependants and, to a lesser extent, by racial grouping. However, while the study includes Northern Ireland domiciled students, the sample size is not sufficiently large to draw reliable conclusions in the NI context.

Harmon C. and Walker I. (2000) *“Education and Earnings in Northern Ireland”* DEL. The focus of this research is on the impact education has on earnings. It is principally based on data extracted from the NI Family Expenditure Survey and the NI Continuous Household Survey and provides details of earnings by gender and by religion.

Osborne R. (1999) *“Higher Education Participation in Northern Ireland”* Journal of the Statistical and Social Inquiry Society of Ireland Vol XXVIII, Part 1. This paper provides an overview of higher education participation in Northern Ireland. The Higher Education Statistics Agency Database is the primary data source for this study. It provides a qualitative analysis of participation by age, gender and religion.

Responses to the Equality Consultation Process

- 3.6 As is required by the Department’s Equality Scheme, DEL conducted a comprehensive equality consultation process on the new Student Support proposals. Annex 4 provides a list of the organisations and representative bodies which DEL consulted during that process. Annex 5 provides a list of those organisations which provided a response. The following section of this report provides an examination of the responses to the equality consultation.

KEY FINDINGS

- 4.1 The purpose of the Preliminary Impact Assessment and of the Consultation at Stage 4 of the process was to identify those categories of students or potential students on whom the proposals may have a differential and adverse impact; the extent of this; whether this can be mitigated or alternatives sought; or whether this can be justified in policy terms.
- 4.2 The responses to the consultation can be defined in four broad themes:
- (i) either broad support for the proposals or more qualified support for particular elements of the proposals;
 - (ii) criticisms of the process undertaken by the Department and, in particular, of the consultation document;
 - (iii) identification of a number of changes which respondents would have wished the Minister to include within his proposals; and
 - (iv) potential areas of adverse impact within the actual proposals.
- 4.3 This section highlights the key findings that have emerged from the Department's own preliminary impact assessment and the views expressed in relation to 4.2 (iv) above. The criticisms of the process are set out in Annex 6 and the additional changes sought in Annex 7; the Department's response to the points raised is included in both these annexes.
- 4.4 As indicated in the Consultation Document the Minister's proposals are designed, inter alia, to promote equality of opportunity for those from less well off backgrounds, who have been traditionally under-represented in further and higher education. It can be argued that those from the various categories identified for the purpose of Section 75 and who are from this background, can benefit directly and positively from changes such as the introduction of means-tested bursaries in HE, childcare grant in HE and from the discretionary bursaries in FE. This is an important context when considering any potential adverse impacts.
- 4.5 The implementation of the Minister's proposals for student support involves a number of changes in the ways in which individual students are treated. These changes involve considerable complexity, for example, in the inter-action between the fee contribution and the access bursaries in HE. The following paragraphs set out the potential adverse impacts identified by the Department and by respondents to its consultation and outlines how each impact has been considered. Annex 8 provides a more detailed assessment of adverse impact and examines further the options which were considered for mitigation. As indicated in the previous section the Department has used the information available to it, with the qualifications as to coverage and robustness which that implies.

4.6 In the Department's view the following proposed changes should not impact adversely on any of the groups covered by Section 75:

- (i) the commissioning of a guidance service for mature students by EGSA and NUS-USI – these organisations will wish to consider the appropriate ways of reaching the potential audience but neither organisation denies access to any of the groups identified in Section 75;
- (ii) the reviewing of financial information provided to students, potential students and parents by ELBs, assisted by the NUS-USI – this review will wish to reflect on the forms and nature of information provided to students but, again, neither the Boards nor the NUS-USI will deny access to any of the groups identified in Section 75 and will wish to make the information as accessible as possible to all of them;
- (iii) to open discussions with the ELBs and the Student Loans Company with a view to re-engineering the administrative system for HE loans – in considering changes to the administrative system the Department will keep in mind the commitments under its Equality Scheme and will work to ensure that there is no adverse impact on the groups identified as a consequence of any resulting changes.

4.7 There were comments made in the responses in respect of these matters. They covered:

- the importance of good quality advice and guidance;
- welcoming the idea of partnership involving the students' representatives;
- seeking more information on what is intended;
- offering support in principle but emphasising that all those in the groups covered by Section 75, either as parents or individuals, should have access to the improved service and requesting consultation with the appropriate groups/bodies.

Since no adverse impact has been identified in respect of these proposed changes, they are omitted from the rest of the analysis.

4.8 Moving to the nine categories identified for the purposes of Section 75, the Department considers that, given the information currently available, it is not possible to identify any adverse impact on:

- persons of different political opinion; or
- persons of different sexual orientation.

None of the responses to the Stage 4 consultation raised adverse impacts in respect of these groups. Information in respect of these matters is not included in any of the current HE and FE databases and it is doubtful if students would be willing to provide the information. Furthermore, no adverse impact has been identified in relation:

- to people of different marital status; or
- to people with dependants or without.

4.9 Persons of Different Religious Belief

Given the comparative income levels of Protestants and Catholics as evidenced by the Northern Ireland Family Expenditure Survey, the use of a means test in the proposals for fee contribution, HE and FE bursaries and for childcare grant may impact more positively on Roman Catholics than on Protestants. More Roman Catholics may access the bursaries and childcare grant and be taken out of fee repayment. In addition, and for the same reasons, the proposed reduction in the level of the loan available to those on incomes over £46,000 may also impact more adversely on Protestants. It is not possible to arrive at a scale for this because we do not know, in detail, the religious breakdown across existing and potential HE and FE students in the various residual income bands up to £15,000 for the bursaries and £20,000 for fee contribution. However, given that there is, and will be, equality of treatment for those on the same income level; the Minister's intention to target resources for those on low incomes; and the implication of New TSN in relation to this use of resources it is an unavoidable and defensible outcome. The Department could consider the possibility of targeting low income families on a pro-rata or quota basis to reflect the relative proportions of the different religious groups in the overall population but this would be rejected on the grounds that it would be contrary to the main aim of the policy change, would be administratively difficult and costly to apply and would treat individuals with the same income backgrounds differently.

- 4.10 The present loan system, with its interest bearing loan element, has an adverse impact on students of the Moslem faith since some Moslems believe that it is against Islamic law to take out a loan where there is an interest element, notwithstanding its index-linked nature. It is difficult to get a scale of the problem but within the overall full-time Northern Ireland under-graduate population of c. 34,000 (UCAS figures on Ethnicity 1999), there were 21 students who were identified as having an ethnic origin which was likely to be Moslem with 50-100 students with origins which might, conceivably, be Moslem. The problem is, therefore, likely to be comparatively small in nature.

In respect of alternatives and/or mitigation the Department has considered the introduction of an administrative charge instead of interest but set at the same level. Having carefully considered the implications it is regretted that this measure, even if regarded as acceptable, could only be adopted at a disproportionate and excessive cost. The Department also considered the possibility of disapplication; for which legislation would be required. That is likely to be susceptible to legal challenge since it gives preferential treatment to one group over others on religious grounds and, therefore, introduces a wider degree of unfairness. There are, in addition, practical difficulties around the assessment of eligibility, the calculation of the potential administrative charge and whether the latter would be accepted, in any case, as the avoidance of interest.

4.11 Persons of a Different Racial Group

The information collected from HE students by HESA categorises ethnicity but there is no robust information available which relates ethnicity to income levels. It is therefore impossible to determine specific adverse impact on those of a different racial group and no respondent has identified any such impact. The Department has considered the issue of travellers, a New TSN priority group. There is, however, no firm data available on travellers in HE and in FE; the existing data would suggest that the scale of access by travellers is minimal. The Department will seek to address this information deficiency in the HE data in consultation with the sector. In FE the Department has already put in place a wide range of measures to encourage access to FE from under-represented groups. In addition travellers will have equal access to the new student support measures.

4.12 Persons of Different Age

The Department drew attention in its Stage 4 Consultation Document to a potential difficulty in relation to the age (over 55) at which childcare grant will not be available. A small number of respondents also pointed this out and one, in particular, extended the issue to student loans, which are also not available to those over the age of 55. There were, in November 2000, 12 Northern Ireland domiciled full-time students, over 55 years, at university. The policy, which is UK-wide, is based on the principle that students should be eligible for loan and any supplementary grant on the same basis. Students over 55 are not eligible for loan and, therefore, for other grants on the basis that loans are advanced on the understanding that they will be paid back out of future earnings. Since the repayment of all loans is cancelled at 65, it would be inappropriate to make income contingent loans available to students who would not be able to repay them by that time. The upper age of 55 has been set based on the likely duration of a course together with the period of employment required, after graduation, likely to be necessary to generate full repayment. This policy will be retained on the grounds of seeking the most efficient use of existing resources. With regard to the link between the loan and childcare grant eligibility, having considered alternatives and mitigation, the Minister has decided to make the Childcare Grant available to over 55s despite the fact that they will not be entitled to a Student Loan. This will take effect, for legislative reasons, from 2002/03.

One respondent has raised the issue of the requirement on students aged 50-54 to prove their intention to return to work after receiving a student loan; this, the respondent argues, effectively excludes those who have been in receipt of Incapacity Benefit. The Department will ensure that this is brought to the notice of the UK group's current review of the links between social security and student support.

4.13 Persons of Different Gender

The Department's Stage 4 consultation document drew attention to two potential areas of adverse impact. These were the possible targeting of higher education places to skill areas in science, engineering and technology which are predominantly male and the introduction of a childcare grant which may impact more positively on women. In the case of the former the Department will focus a significant element (the scale of which is yet to be determined) of the 1,000 new places on increasing access to HE in a manner which also promotes a broad range of skills. The Department will also consider with the sector ways in which more women can be attracted into the skill needs areas. In the case of the latter there will be equality of opportunity between men and women in terms of access to the grant; the Department would not wish to affect negatively the opportunities for lone or married women with dependent children to access HE by establishing quotas or setting limits.

- 4.14 One respondent has raised a further issue though it is not related to the changes proposed by the Minister. Under the existing loan arrangements women may be adversely affected in terms of the repayment of the loan since their salaries, in work, are lower than men and lower in Northern Ireland than in the rest of the United Kingdom. This may mean, in consequence, that women may take longer to repay than men. The loan system has not been in existence long enough to achieve a sense of scale in this regard. The Department will, however, seek information from the Student Loans Company/Inland Revenue after an appropriate period to determine the position.

4.15 Persons with Disability and Persons without

Those groups with a particular interest in students with disabilities or learning difficulties drew attention in their responses to the particular problems of access facing these groups of students. While welcoming some of the Minister's proposals they felt in particular that, notwithstanding the introduction of Individual Learning Accounts, the emphasis on full-time study for fee abolition and bursary provision in FE would impact adversely on these students because the part-time mode was a more likely access route for these groups. The Department has put in place a support mechanism in FE and Disabled Student Allowances have been extended, in HE, to part-time students (on a course which is over 50 per cent of a full-time course) and to post-graduate students. The move to a more consistent fee remission policy in FE will take into account the opportunities for disabled students in particular. The Department will seek to consider these issues further in relation to its proposed legislation on disabled access to further and higher education, consequent upon the recommendations of the Disability Rights Task Force. The Department will wish to consult with the main representative groups in taking forward this consideration.

- 4.16 No adverse comments have been made by respondents nor does the Department consider that there is a negative impact in respect of its responsibility to have regard to the desirability of promoting good relations between persons of different religious belief, political opinion or racial group. The Department, therefore, considers that the proposals for change will not detract from this responsibility.

SUMMARY OF STATISTICAL INFORMATION CONSIDERED

GENDER PROFILE

TABLE 1A: Further Education Level Vocational Enrolments Aged 19 and Over At NI Further Education Colleges 1999/00

Gender	Full-Time		Part-Time	
	Numbers	Percent	Numbers	Percent
Female	1,105	48%	28,091	69%
Male	1,205	52%	12,798	31%
Total	2,310	100%	40,889	100%

Note 1: Figures relate to a snapshot of enrolments at 1st November 1999.
Source: FESR

TABLE 1B: NI Domiciled Higher Education Undergraduate Enrolments on HE Level Courses 1999/00

Gender	Full-Time		Part-Time	
	Numbers	Percent	Numbers	Percent
Female	20,869	57%	12,051	62%
Male	15,875	43%	7,316	38%
Total	36,744	100%	19,367	100%

Note 1: Information on HE includes UK universities, colleges of education and NI FE colleges.
Source: HESA; FESR

TABLE 1C: Further Education Level Vocational Enrolments Aged 19 and over at NI Further Education Colleges on keyskill courses 1999/00

Keyskill area	Mode of Attendance	Gender			
		Female		Male	
ICT/Software Engineering	Full-time & Sandwich	48	34%	93	66%
	Part-time	6,568	69%	2,950	31%
Tourism & Hospitality	Full-time & Sandwich	192	66%	99	34%
	Part-time	767	67%	385	33%
Electronics	Full-time & Sandwich	0	0%	33	100%
	Part-time	37	6%	560	94%
Construction	Full-time & Sandwich	3	1%	292	99%
	Part-time	19	2%	822	98%
Manufacturing/Engineering	Full-time & Sandwich	1	4%	25	96%
	Part-time	105	34%	204	66%
Total	Full-time & Sandwich	244	31%	542	69%
	Part-time	7,496	60%	4,921	40%

Note 1: Figures relate to a snapshot of enrolments at 1st November 1999.
Source: FESR

TABLE 1D: NI Domiciled Higher Education Undergraduate Enrolments on HE Level courses by Keyskill area 1999/00.

Keyskill area	Mode of Attendance	Gender			
		Female		Male	
ICT/Software Engineering	Full-time & Sandwich	942	33%	1,892	67%
	Part-time	740	49%	765	51%
Tourism & Hospitality	Full-time & Sandwich	948	76%	301	24%
	Part-time	139	67%	69	33%
Electronics*	Full-time & Sandwich	72	12%	513	88%
	Part-time	10	4%	218	96%
Construction	Full-time & Sandwich	189	13%	1,243	87%
	Part-time	32	8%	378	92%
Manufacturing/Engineering	Full-time & Sandwich	64	39%	100	61%
	Part-time	5	7%	67	93%
Total	Full-time & Sandwich	2,215	35%	4,049	65%
	Part-time	926	38%	1,497	62%

*excludes HZ Engineering group.

Note 1: Information on HE includes UK universities, colleges of education and NI FE colleges.

Source: HESA; FESR

TABLE 1E: Average Gross Weekly Earnings by Gender

Year	Male	Female	All
1996	£337.5	£256.6	£306.2
1997	£356.0	£265.4	£319.9
1998	£367.7	£277.6	£332.6
1999	£376.8	£295.1	£344.9
2000	£393.3	£307.3	£360.4

Source: New Earnings Survey, DETI

Note 2: There are approx. 1000 NI domiciled HE students at Rol Institutions. These have been excluded from all HE tables as a breakdown is not available.

Note 3: There are approx. 200 NI domiciled HE students at GB FE Institutions. These have been excluded from all HE tables as a breakdown is not available.

RELIGIOUS PROFILE

TABLE 2A: Further Education Level Vocational Enrolments Aged 19 and Over At NI Further Education Colleges 1999/00

Religion	Full-Time		Part-Time	
	Numbers	Percent	Numbers	Percent
Protestant	636	28%	13,681	33%
Roman Catholic	1,229	53%	13,785	34%
Other	48	2%	841	2%
Not stated/unknown *	397	17%	12,582	31%
Total	2,310	100%	40,889	100%

* Includes those who respond 'No Religion'.

Note 1: Figures relate to a snapshot of enrolments at 1st November 1999.

Note 2: FE Colleges use 'Community Background' to access Religion information.

Source: FESR

TABLE 2B: NI Domiciled Higher Education Undergraduate Enrolments on HE Level Courses 1999/00

Religion	Full-Time		Part-Time	
	Numbers	Percent	Numbers	Percent
Protestant	7,762	21%	3,653	19%
Roman Catholic	10,691	29%	3,795	20%
Other	543	1%	255	1%
Not stated/unknown *	17,748	48%	11,664	60%
Total	36,744	100%	19,367	100%

* Includes those who respond 'No Religion'.

Note 1: Information on HE includes UK universities, colleges of education and NI FE colleges.

Source: HESA; FESR

TABLE 2C: Religious Profile of all Northern Ireland Households (1998/99)

Religion	%
Catholic	30
Protestant	50
Other *	3
Unwilling to answer	16
Base Number of Households	2809

* Includes respondents stating no religious denomination.

Source: Continuous Household Survey

TABLE 2D: Average Gross Weekly Household Income by Religion of Head of Household**

(All households 1996/97 – 1998/99)

Religion of head of Household	Average gross weekly household income	Households in Sample
Catholic	£316	676
Protestant	£359	1,037
All households*	£347	1,824

* Including households whose head gave a religious denomination other than Protestant or Catholic, or who stated that they did not belong to any religious denomination, or who refused to answer the question

** Figures averaged over the last three years of the survey.

Source: NI Family Expenditure Survey

AGE PROFILE

TABLE 3A: Further Education Level Vocational Enrolments Aged 19 and Over At NI Further Education Colleges 1999/00

Age	Full-Time		Part-Time	
	Numbers	Percent	Numbers	Percent
19 and 20 inclusive	1,509	65%	3,926	10%
21 to 24 inclusive	399	17%	5,487	13%
25 to 54	390	17%	27,969	68%
55 and over	3	0%	3,093	8%
Unknown	9	0%	414	1%
Total	2,310	100%	40,889	100%

Note 1: Figures relate to a snapshot of enrolments at 1st November 1999.
Source: FESR

TABLE 3B: NI Domiciled Higher Education Undergraduate Enrolments on HE Level Courses 1999/00

Age	Full-Time		Part-Time	
	Numbers	Percent	Numbers	Percent
Under 19	7,001	19%	458	2%
19 and 20 inclusive	17,396	47%	1,295	7%
21 to 24 inclusive	10,148	28%	2,781	14%
25 to 49	2,118	6%	12,803	66%
50 and over	47	0%	1,745	9%
Unknown	34	0%	285	1%
Total	36,744	100%	19,367	100%

Note 1: Information on HE includes UK universities, colleges of education and NI FE colleges.
Source: HESA; FESR

TABLE 3C: Average Gross Weekly Earnings by Age (2000)

Age Group	£
18 to 20	£189.8
21 to 24	£228.1
25 to 29	£288.6
30 to 39	£365.3
40 to 49	£417.3
50 to 59	£403.2
60 to 64	£354.8
65 and over	*
All ages	£360.4

* Too few in sample to provide reliable estimate
Relates to average gross weekly earnings of all employees whose rates of pay were unaffected by absence
Source: New Earnings Survey, DETI

DISABILITY PROFILE

TABLE 4A: Further Education Level Vocational Enrolments Aged 19 and Over At NI Further Education Colleges 1999/00

Disability	Full-Time		Part-Time	
	Numbers	Percent	Numbers	Percent
Declared Disability	169	7%	997	2%
No Declared Disability	2,141	93%	39,892	98%
Total	2,310	100%	40,889	100%

Note 1: Figures relate to a snapshot of enrolments at 1st November 1999.

Note 2: For the disability category, unknown cases have been assumed to have no disability.

Source: FESR

TABLE 4B: NI Domiciled Higher Education Undergraduate Enrolments on HE Level Courses 1999/00

Disability	Full-Time		Part-Time	
	Numbers	Percent	Numbers	Percent
Declared Disability	1,716	5%	508	3%
No Declared Disability	35,028	95%	18,859	97%
Total	36,744	100%	19,367	100%

Note 1: Information on HE includes UK universities, colleges of education and NI FE colleges.

Source: HESA; FESR

TABLE 4C: Incidence of Disability in Population of Working Age

Disability	Numbers	Percent
Disability*	194,000	19%
No Disability	827,000	81%
Total	1,021,000	100%

*Comprises those either currently DDA disabled or with a work limiting disability.

Source: Labour Force Survey

TABLE 4D: Average Gross Weekly Earnings (Winter 2000/01)

	As percentage of overall average Gross Weekly Earnings* (average =100%)
Disability: Disabled**	86.6%
Not Disabled	101.6%

* *Main job only*

** *Comprises those either currently DDA disabled or with a work limiting disability.*

Source: Labour Force Survey

MARITAL STATUS

TABLE 5A: Average Gross Weekly Earnings (Winter 2000/01)

	As percentage of overall average Gross Weekly Earnings* (average = 100%).
Marital Staus: Married	109.5%
Single, Widowed or Divorced	83.8%

* *Main job only*

Source: Labour Force Survey

Note: Information on marital status will become available for the FE sector when data for the 2000/01 academic year is published.

Data on marital status is not yet collected by the Higher Education Statistics Agency.

PERSONS WITH DEPENDANTS

TABLE 6A: Average Gross Weekly Earnings (Winter 2000/01)

	As percentage of overall average Gross Weekly Earnings* (average = 100%)
Dependants:	
Persons with Dependant Children	94.3%
Persons without Dependant Children**	106.4%

* Main job only

** Dependant children are those less than 16 or aged 16 to 18 in full time education.

Source: Labour Force Survey

TABLE 6B: Percentage of Households by Type

Year	Married/ Cohabiting Couple with Dependant Children*	Lone Mother with Dependant Children*	Lone Father with Dependant Children*	Households without Dependant Children ***	All (100%)
1995/96	31.0	8.0	**	61.0	100.0
1996/97	31.0	8.0	**	61.0	100.0
1997/98	30.0	8.0	**	62.0	100.0
1998/99	28.0	9.0	**	63.0	100.0

* Dependant Children are persons under 16, or aged 16 to 18 in full-time education, in family unit and living in the household.

** Significantly less than 1% of all households.

** Includes one person households, households with 2 or more adults, married or cohabiting couples and lone parents without dependant children.

Source:- Continuous Household Survey

Note: Information on Dependants is not currently collected by the Higher Education Statistics Agency.

Comprehensive data relating to dependants will be available for the Further Education sector when 2000-01 information is published.

ETHNIC ORIGIN

TABLE 7A: Further Education Level Vocational Enrolments Aged 19 and Over At NI Further Education Colleges 1999/00

ETHNICITY	Full-Time		Part-Time	
	Numbers	Percent	Numbers	Percent
White	1,192	51.6%	26,480	64.8%
Black Caribbean	-	0.0%	3	0.0%
Black African	1	0.0%	10	0.0%
Black Other	-	0.0%	5	0.0%
Indian	3	0.1%	24	0.1%
Pakistani	-	0.0%	6	0.0%
Bangladeshi	-	0.0%	15	0.0%
Chinese	12	0.5%	94	0.2%
Other	10	0.4%	61	0.1%
Information not known	1,092	47.3%	14,191	34.7%
Total	2,310	100.0%	40,889	100.0%

Note 1: Figures relate to a snapshot of enrolments at 1st November 1999.
Source: FESR

TABLE 7B: NI Domiciled Higher Education Undergraduate Enrolments on HE Level Courses 1999/00

ETHNICITY	Full-Time		Part-Time	
	Numbers	Percent	Numbers	Percent
White	31,493	85.7%	10,613	54.8%
Black Caribbean	5	0.0%	1	0.0%
Black African	19	0.1%	10	0.1%
Black Other	16	0.0%	9	0.0%
Indian	60	0.2%	11	0.1%
Pakistani	19	0.1%	2	0.0%
Bangladeshi	4	0.0%	0	0.0%
Chinese	94	0.3%	6	0.0%
Other	116	0.3%	49	0.3%
Information not known	4,918	13.4%	8,666	44.7%
Total	36,744	100.0%	19,367	100.0%

Note 1: Information on HE includes UK universities, colleges of education and NI FE colleges.
Source: HESA; FESR

Note: Income data on ethnicity is not available from official sources due to small sample size

5. CONCLUSIONS

5.1 The review of student support and the policy proposals emanating from it are designed to enhance equality of opportunity and equity of treatment in further and higher education for those, in particular, from lower income backgrounds. It has not been possible, given the financial constraints and competing Executive priorities, to satisfy every proposal for change put forward in the Review by the Assembly Committee Report or by other respondents. It has not been possible, for example, due to resource limitations to abandon the loans based system of maintenance nor, at one step, to match the resources in FE with those in HE. The Minister has had to determine priorities and balance competing demands and has set out his proposals within a context of improving social cohesion and justice and seeking to promote economic development.

5.2 The proposals, which are very complex and often inter-related, have been subjected to a rigorous assessment of their equality impact on the nine groups identified in Section 75 of the Northern Ireland Act by the Department. This has been followed up by an equality consultation seeking views from those outside the Department, especially those with a direct interest in and knowledge of the relevant issues. Full consideration has been given to the responses received both in this and in the earlier consultation. The key findings of the equality impact assessment have been set out in Section 4.

5.3 A number of issues arising have been brought to the attention of the Minister, Dr Farren:

- (i) the criticisms of the process undertaken by the Department;
- (ii) the additional changes which respondents would wish to have included in the proposals;
- (iii) the potential areas of adverse impact identified in the Key Findings.

In addition, the Minister's attention has been drawn to deficiencies in the data available.

The responses to (i) and (ii) are set out in the appropriate annexes; the responses to (iii) are set out in Section 4 and summarised below.

5.4 The following outcomes have been agreed in response to the Equality Impact Assessment:

<u>Broad Issue</u>	<u>Response</u>
Gaps in the data in respect of the nine categories.	How to take this forward will be discussed with the Equality Commission, the ELBs and the institutions – decisions by December 2001.
Criticisms of the process undertaken by the Department.	The Department acted on the information available to it at the time of preparation, following advice from its Equality Unit and in line with its Equality Scheme. The Department will comply with the advice and guidance offered by the Equality Commission.
Additional changes which respondents would have wished to include in the Minister's proposals.	The Minister will consider matters raised by respondents – decisions in time for the Spending Review 2002/03.

<u>Potential Adverse Impacts</u>	<u>Response</u>
Religious belief – means test for fee contribution, bursaries and childcare grant and changes to loan may impact adversely on Protestants because of their higher income levels.	The Department has considered alternative approaches but has decided to retain the proposals which are in support of New TSN.
Religious belief – loan system has an adverse impact on Moslem students whose religious beliefs do not support loans.	The Department has considered alternative approaches but changes could only be made at excessive cost and could lead to greater unfairness.
Age – potential adverse impact on over 55s in respect of student loans and supplementary grants.	The Department will retain the arrangements for loan availability but will make the Childcare Grant to those aged over 55 by September 2002.
Age – requirement of 50-54 year olds to prove their intention to return to work after receiving a student loan.	The Department will ensure that this matter is brought to the notice of the UK wide group currently exploring the social security issues relating to student support.

Potential Adverse Impacts

Response

Gender – targeting of skill areas may impact adversely on women.

The Department will adopt wider access as a factor in the allocation of places and will consider, with the sector, how to attract more women to enter courses in the necessary skill areas – decisions by March 2002.

Gender – childcare grant may potentially impact adversely on men.

The Department will ensure there is equality of opportunity within the scheme but does not wish to affect the opportunities, especially for women who are lone parents, to enter HE.

Gender – potential adverse impact on women in repayment of loans due to differential salaries.

The Department will seek information on this issue from the Student Loans Company/Inland Revenue – discussion in Spring 2002.

Disability – focus of response on full-time has a potentially adverse impact on people with a disability.

The Department has other support mechanisms in place for disabled students and ILAs are available for certain part-time courses. The Department will, however, consider the issues raised in taking forward the Bill on disabled access to third level education – consideration in 2001/02.

5.5 This Report on the Equality Impact Assessment will be issued to the Department's list of consultees. On request it will be made available on audio-tape, in Braille, large print and minority languages for those not fluent in English. To obtain a copy please contact Alan MacDonald, Student Support Branch, DEL Tel 028 90 257741. In addition, the report will be published on the Department's website at www.nics.gov.uk/mainfe.htm

5.6 Having considered carefully the responses from the consultation process, the Minister has decided to respond to the issues raised in the manner outlined in para 5.4 and to take forward his proposals on that basis. The timetable for implementation is:

2000/2001

Introduction of HE Individual Learning Accounts.

Introduction of FE Individual Learning Accounts.

2001/2002

Higher Education

Raise the tuition fee threshold to £20,000.

Introduce a Childcare Grant.

EGSA/NUS/USI to provide an enhanced guidance service for mature students.

Discuss return to work requirement for 50-54 year olds with DHSSPS and other jurisdictions.

Further Education

ELBs/NUS/USI to review financial information for potential students.

Abolition of FE tuition fees for students aged over 19.

Introduce discretionary Access Bursaries.

Increase FE Access (Support) Funds.

Introduce consistent fee remission policy for part-time students.

Consider access issues for disabled students as part of DE/DEL Bill.

Review

Consider, discuss and agree information requirements.

2002/2003

Higher Education

Begin increasing HE places by 1,000 (over 3 years from 2002/2003) – on basis of skill needs and access.

Introduction of means-tested HE Access Bursaries.

Reduce amount of loan available to students with parents' income greater than £46,000 pa.

Extend childcare grant to over 55s.

Seek information on loan repayment from Inland Revenue.

ADMINISTRATION

To re-engineer the administrative system for HE loans. Discussions will begin shortly with ELBs and the Student Loans Company to explore alternative delivery mechanisms for student loans. Until this has been done and the practical issues explored it is not possible to estimate when any new system could be introduced. At this point, therefore, all that can be said is that September 2002 is the earliest possible date.

Monitoring and Evaluation

- 5.7 Plans for the evaluation of the new student support policy have been put in place. The evaluation will measure the effectiveness and efficiency of the policy in delivering the stated policy aims. The Department is committed to completing a full evaluation report by January 2008 and conducting preliminary assessments in 2004 and 2006. These assessments will be informed by relevant monitoring data and the Department is currently putting in place arrangements for the ongoing collection of that information. As part of this monitoring and evaluation process, DEL will also collect data to monitor the equality impact of the new student support arrangements across the equality categories and will pay particular regard to areas where the potential for adverse impacts have been identified.

Section 3 of this report identified a number of gaps in the data in respect of some of the categories covered in Section 75. The Department will consider how this should be addressed in consultation with the Equality Commission, the Education and Library Boards and the institutions with decisions reached by December 2001. These issues are discussed more fully at Paragraph 5.4 of this report. The Department will, in line with its equality scheme, publish the outcomes of the equality monitoring process on its website at www.nics.gov.uk/mainhfe.htm.

Annex 1	Terms of Reference of Review
Annex 2	Minister's Proposals
Annex 3	HE and FE Enrolment Statistics
Annex 4	List of Organisations and Representative Bodies that DEL consulted during the Equality Consultation Process
Annex 5	List of Respondents to the Equality Consultation Process
Annex 6	Criticism of the Process and Department's Response
Annex 7	Additional Changes Sought and Department's Response
Annex 8	Detailed Assessment of Adverse Impacts

ANNEX 1

Terms of Reference

To review tuition fees and financial support for students normally resident in Northern Ireland participating, part-time or full-time, in further and undergraduate higher education courses in Northern Ireland and elsewhere, taking account of affordability and value for money.

To have regard to the desirability of promoting access to further and higher education, particularly for those groups currently under-represented, while taking account of the need to maintain and develop quality and standards, and the position of Northern Ireland's further and higher education in the wider United Kingdom system.

To have regard to the changes in student financial support arrangements elsewhere in the UK.

To have regard to new developments in support of lifelong learning such as Individual Learning Accounts.

To make recommendations for any changes to the current system, which would better target existing financial provision and, if appropriate, to provide costed options where these may require additional financial resources.

ANNEX 2

PROPOSALS FOR CHANGES TO THE ARRANGEMENTS FOR STUDENT FINANCIAL SUPPORT

Higher Education

1. To raise the residual threshold at which a student contribution (maximum £1,050 in 2000/01) towards tuition fees becomes due from £17,800 to £20,000.
2. To introduce a childcare grant to assist students on low incomes with dependant children.
3. To introduce means-tested, non-repayable Access Bursaries of up to £1,500 per annum for full-time undergraduate students £10,000 or less.
4. To reduce the loan available to students whose parents or spouses have residual incomes of over £46,000 a year by up to £250 to enable resources to be targeted on assistance for students from lower income families.
5. Individual Learning Accounts were introduced in September 2000 to encourage lifelong learning by helping those aged 18 and over, to meet the cost of a wide range of part-time courses.
6. To increase domestic HE places by a further 1,000 over 3 years from 2002-03.
7. To commission Educational Guidance Service for Adults to provide a guidance service, in co-operation with student representatives, to ensure that mature students receive full information about the costs and other aspects of entry into higher education.
8. To commission the Education and Library Boards, assisted by student representatives, to review the nature and distribution of the financial information they provide to students, potential students and parents.

Further Education

9. To abolish tuition fees for full-time students, over 19, on vocational FE courses.
10. To introduce around 3,000 discretionary Access Bursaries of up to £1,500 for full-time students, over 19.
11. To increase the Access (Support) Funds administered by the FE colleges by a further £0.5m.
12. To introduce a consistent fee remission policy for part-time students across the FE sector.
13. To provide Individual Learning Accounts, to help pay course fees of part-time FE students.

Administration

14. To open discussions with the Education and Library Boards and the Student Loans Company with a view to re-engineering the administrative system for HE loans in order to make the processes simpler and more transparent and to develop its capacity for the electronic delivery of services.

ANNEX 3

NI domiciled students in Higher Education Institutions in the UK by level of study, mode of study and gender 1996/97

LEVEL OF STUDY	Full-time & Sandwich			Part-time			Total		
	Female	Male	Total	Female	Male	Total	Female	Male	Total
First Degree	15,408	13,084	28,492	3,134	2,567	5,701	18,542	15,651	34,193
Other Undergraduate	921	1,021	1,942	2,532	1,564	4,096	3,453	2,585	6,038
Postgraduate	1,673	1,674	3,347	2,861	2,700	5,561	4,534	4,374	8,908
Total	18,002	15,779	33,781	8,527	6,831	15,358	26,529	22,610	49,139

NI domiciled students in Higher Education Institutions in the UK by level of study, mode of study and gender 1999/00

LEVEL OF STUDY	Full-time & Sandwich			Part-time			Total		
	Female	Male	Total	Female	Male	Total	Female	Male	Total
First Degree	17,161	13,489	30,650	2,686	1,345	4,031	19,847	14,834	34,681
Other Undergraduate	2,004	928	2,932	4,678	2,955	7,633	6,682	3,883	10,565
Postgraduate	1,931	1,473	3,404	2,902	2,637	5,539	4,833	4,110	8,943
Total	21,096	15,890	36,986	10,266	6,937	17,203	31,362	22,827	54,189

Source: Higher Education Statistics Agency database

NI domiciled students enrolled in NI Institutes of Further & Higher Education by level of study, mode of study and gender: 1996/97

Level of Course	Full-Time			Part-Time			Total		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Post-Grad Degree	28	41	69	35	41	76	35	41	76
Sub-Degree	1,255	1,623	2,878	2,261	2,621	4,882	3,516	4,244	7,760
FE	10,846	10,162	21,008	18,635	35,479	54,114	29,481	45,641	75,122
Total	12,129	11,826	23,955	21,018	38,411	59,429	33,147	50,237	83,384

NI domiciled students enrolled in NI Institutes of Further & Higher Education by level of study, mode of study and gender: 1999/00

Level of Course	Full-Time			Part-Time			Total		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Post-Grad Degree	49	107	156	29	76	105	29	76	105
Sub-Degree	1,409	1,597	3,006	2,860	4,248	7,108	4,269	5,845	10,114
FE	10,586	9,535	20,121	20,479	35,921	56,400	31,065	45,456	76,521
Total	12,044	11,239	23,283	23,524	40,684	64,208	35,568	51,923	87,491

Source: Further Education Statistical Record

ANNEX 4

LIST OF ORGANISATIONS/REPRESENTATIVE BODIES/INDIVIDUALS THAT DEL CONSULTED WITH DURING THE EQUALITY CONSULTATION PROCESS.

- The Equality Commission for Northern Ireland
- The Human Rights Commission
- The Community Relations Council
- The Northern Ireland Statistics and Research Agency

RELIGIOUS BELIEF

- The main churches
- Co-operation Ireland
- Counteract

POLITICAL OPINION

- The Northern Ireland Political Parties
- Co-operation Ireland
- Counteract

GENDER

- NI's Women's European Platform
- Opportunity Now
- Press for Change
- Training for Women Network
- Women's Information Group
- Women into Trades and non-Traditional Occupations
- Women's Resource & Development Agency
- Women's Support Network
- Youth Action NI Gender Equality Unit

RACE

- Chinese Welfare Association
- Indian Community Centre
- Multi-Cultural Resource Centre
- NI African Cultural Centre
- NI Council for Ethnic Minorities
- Travellers Movement NI

DISABILITY

- Action Mental Health
- British Deaf Association
- The Cedar Foundation
- Disability Action
- Employers Forum on Disability
- MENCAP
- NI Association for Mental Health
- NI Union of Supported Employment
- Praxis
- RNIB (NI)
- RNID (NI)
- Sense NI
- Skill NI

AGE

- Age Concern
- Help the Aged NI
- Youth Action NI
- Youth Council for Northern Ireland
- Putting Children First

MARITAL STATUS

- Gingerbread NI

DEPENDANTS

- Age Concern
- Gingerbread NI
- Carers' National Association NI
- NI Anti-Poverty Network

SEXUAL ORIENTATION

- Cara-Friend
- Coalition on Sexual Orientation
- Gay and Lesbian Youth NI
- Lesbian Line
- NI Gay Rights Association
- Queer Space

GOOD RELATIONS

- INCORE
- Counteract

OTHER ORGANISATIONS

- Association of Chief Officers of Voluntary Organisations
- NATFHE
- NIC/ICTU
- NI Council for Voluntary Action
- NI Voluntary Action
- NI Voluntary Trust
- NIPSA
- UNISON

EDUCATIONAL INTERESTS

- NUS/USI
- Open University
- University of Ulster
- Queens University Belfast
- Stranmillis University College
- St Mary's University College
- Ulster People's College
- EGSA
- WEA
- BELB
- NEELB
- WELB
- SELB
- SEELB
- NI Anti-Poverty Network
- Belfast Centre for the Unemployed
- Extern
- CBI
- Institute of Directors
- CCMS
- NI Business Education Partnership
- Armagh College of Further & Higher Education
- BIFHE
- Castlereagh College of Further & Higher Education
- Causeway Institute of Further & Higher Education
- East Antrim Institute of Further & Higher Education
- East Down Institute of Further & Higher Education
- East Tyrone College of Further Education
- Fermanagh College of Further Education

- Limavady College of Further Education
- Lisburn College of Further & Higher Education
- Newry & Kilkeel College of Further & Higher Education
- North Down & Ards Institute of Further & Higher Education
- North East Institute of Further & Higher Education
- North West Institute of Further & Higher Education
- Omagh College of Further Education
- Upper Bann Institute of Further & Higher Education
- Northern Ireland Hotel and Catering College
- SKILL

Plus all the individuals and organisations issued with the original Student Finance Review consultation document in March 2000 and not included in the above list.

ANNEX 5

LIST OF RESPONDENTS TO THE EQUALITY CONSULTATION PROCESS

British Deaf Association

Committee on the Administration of Justice (CAJ)

Down District Council

East Down Institute of Further and Higher Education

Educational Guidance Service for Adults (EGSA)

Equality Commission for Northern Ireland

Employment and Learning Assembly Committee

Mencap

NATFHE

Newry & Kilkeel Institute of Further and Higher Education

North East Institute of Further and Higher Education

North West Institute of Further and Higher Education

NUS-USI

Skill Northern Ireland

Strabane District Council

Stranmillis University College

Transferor Representatives Council

University of Ulster

ANNEX 6

CRITICISMS OF THE PROCESS

The way in which the Department undertook the process received criticisms from:

The Equality Commission;
The Assembly Committee for DEL;
The Committee on the Administration of Justice;
The University of Ulster;
The NUS-USI; and
Skill Northern Ireland.

The criticisms focused on:	The Department's response:
<ul style="list-style-type: none"><li data-bbox="304 913 836 1055">(i) lack of clarity about the stage of the Equality Commission's seven stage process at which the Consultation took place;<li data-bbox="304 1093 836 1193">(ii) concern that the full range of data used by the Department for its assessment had not been included;<li data-bbox="304 1232 836 1373">(iii) concern that the alternatives or possible mitigations to any potential adverse impacts had not been considered.	<ul style="list-style-type: none"><li data-bbox="836 913 1358 1093">(i) the Department carried out the earlier stages of the EQIA internally in line with the advice given by its Equality Unit. The consultation was at Stage 4 of the process;<li data-bbox="836 1131 1358 1310">(ii) the Department used data that was, almost totally, already published material. A summary of the information has been included in this Report;<li data-bbox="836 1348 1358 1516">(iii) the Department reported in the document on the outcomes of its preliminary consideration. The alternatives or mitigations are covered in this Report.

ANNEX 7

ADDITIONAL CHANGES SOUGHT AND DEPARTMENT'S RESPONSE

A number of respondents indicated other changes which they would have wished the Minister to include in his proposals either for their intrinsic merit or because respondents believed that they would promote even greater equality of opportunity. Within the review the Minister had to make difficult choices about priorities and could not satisfy all calls for change. The Minister will, however, consider these ideas for future reference:

Would have liked:

In Further Education:

- free course provision for those with literacy difficulties;
- inclusion of A levels for fee abolition/bursary in FE;
- removal of flags and emblems from venues;
- assistance with transport costs for adult part-time learners;
- extension of childcare support to family carers;
- extension of access funds to part-time non-vocational programmes;
- inclusion of registration/exam/assessment fees within fee remission policy colleges;
- childcare grant for FE;
- insufficient consideration of those with learning difficulties – eg omission of part-time non-vocational from fee abolition; access bursaries in FE only for full-time; Access Funds administered by colleges will not ensure inclusion; extension of childcare to carers;

In Higher Education:

- incentives for those wishing to enter ITT;
- HE bursaries set at Scottish levels;
- a review specific to disabled students;
- consideration of social security issues – interaction of housing benefit/disabled living allowance;
- more information on DSA;

- more on meeting needs of the deaf;
- same threshold for HE bursaries as for fees;
- have audit statements of income for Access Funds;
- changes to fee policy in respect of BEd, which, it is argued works against females who take BEd route and mature students and those with dependants;
- students with a disability – current rules in relation to part-time study for DSA excludes those who cannot study 50% or more of a full-time course.

In general:

- more emphasis on female lone parents, especially in respect of childcare grant;
- need for more specific information on the Section 75 groups;
- support for mature students for childcare should be comparable with that available in New Deal.

ANNEX 8

DETAILED ASSESSMENT OF ADVERSE IMPACTS

Paragraph 6.8 of the Equality Commission's Practical Guide to Equality Impact Assessment indicates that in cases where a decision is made to introduce measures to mitigate an adverse equality impact then it would be appropriate to address each of the following questions:

How does each option for mitigation further or hinder equality of opportunity?

How does each option reinforce or challenge stereotypes which constitute or influence equality of opportunity?

What are the consequences for the group concerned and for the public authority of not adopting an option more favourable to equality of opportunity?

How will the relevant group be advised of the new or changed policy or service?

What are the costs of implementing each option? Will the social and economic costs and benefits to the relevant group of implementing the option outweigh the costs to the public authority or other relevant groups? An evaluation of net social benefits achieved by adopting each option must be considered.

Does the public authority have international obligations which would be breached by, or could be furthered by, each of the options?

The Department, after a thorough examination of the available data and consideration of the responses to the equality consultation exercise, has identified several areas in the new student support proposals where adverse impacts could occur. These are, the objections which Moslems have to the loans system on religious grounds; loans and Childcare Grant not made available to those students over the age of 55; the requirement for those between the ages 50 to 54 to prove their intention to return to work when applying for the loan; and the targeting of support for skill relevant areas through new places in HE and the abolition of fee in FE. The following provides a detailed analysis of the alternative courses of action which were considered by the Department during its assessment of the above issues and in each case the above six questions are addressed.

1. Moslem Objection to the Loans Based System in HE

Some Moslems believe that it is against Islamic Law to take out a loan where there is an interest element. Moslem students who take this view may therefore feel that it is contrary to their religious beliefs to take out student loans, notwithstanding the link to general inflation. For such students, a loans based student finance system may have an adverse impact. The Department has considered the economic and social costs and benefits associated with three options in relation to this adverse impact. These are: retain current loan based system but introduce bursaries for those from low income backgrounds; replace interest element with an administrative charge; and provide an exemption from the interest charge for Moslem students.

How does each option for mitigation further or hinder equality of opportunity?

Retaining the current loans system would not fully mitigate this adverse impact. However, the new student support proposals include the introduction of means tested bursaries in HE and Northern Ireland domiciled Moslems will have equal access to this non-interest bearing source of student financial support. This will mitigate the adverse impact partially but not entirely.

It is not clear that replacing the index linked interest element of the student loan with an administrative charge would fully mitigate the adverse impact. It would be of an equal value to the interest charge and would, in effect, be a percentage added to the amount borrowed. This could be interpreted as interest by another name. In addition it would be administratively and legislatively difficult to introduce and manage.

Exempting Moslem students from the payment of interest would go furthest in addressing the adverse impact. However, it is likely to present legal difficulties as it gives preferential treatment to one group on religious grounds; this, it could be argued, introduces a greater degree of unfairness.

How does each option reinforce or challenge stereotypes which constitute or influence equality of opportunity?

The two 'do something' options could reinforce any prejudices that exist in society due to the perception of differential and/or preferential treatment of this religious group.

What are the consequences for the group concerned and for the public authority of not adopting an option more favourable to equality of opportunity?

The group concerned may not, on the grounds of religious belief, avail of the full student support package. By retaining the current loan arrangements, the Department would continue to follow the UK lead on this issue.

How will the relevant group be advised of the new or changed policy or service?

The Department annually publishes guidance on the package of student support and this information is made widely available. In addition, it is proposed that the extent of the financial information provided to students, potential students and parents by the ELBs will be reviewed with the assistance of the NUS-USI. The aim of this review process will, in part, be to ensure students, regardless of equality group, can make more informed choices regarding their studies.

What are the costs of implementing each option? Will the social and economic costs and benefits to the relevant group of implementing the option outweigh the costs to the public authority or other relevant groups? An evaluation of net social benefits achieved by adopting each option must be considered.

Retaining the current loan based system would be the cheapest option although, as referred to above, it is likely to be the least effective in tackling the potential adverse impact. Both of the 'do something' options are likely to add significant additional costs in terms of the requirement for further legislative and administrative work. However, given the small number of NI domiciled Moslem students, the potential for reinforced prejudices as a result of perceived differential and preferential treatment, neither of these options would represent an effective use of resources. Any marginal additional social benefits would be significantly outweighed by the additional financial costs.

Does the public authority have international obligations which would be breached by, or could be furthered by, each of the options?

This question is not directly relevant in this matter.

2. Loans and Childcare Grant not made available to those Students Over the Age of 55

Currently, Student Loans and the Childcare Grant are not made available to students who are over the age of 55. This arrangement applies at the UK level. The rationale is that loans are cancelled once the age of 65 is reached and it would not be appropriate or represent best use of resources to make income contingent loans available to students who would not be able to repay them. In terms of the Childcare Grant, eligibility is assessed on the same basis as the loan. In November 2000 there were 12 Northern Ireland domiciled students over the age of 55. The Department has considered three options in relation to this adverse impact. These are: Option 1 - retain existing arrangements for loan and Childcare Grant; Option 2 - retain existing arrangements for the loan but allow eligibility to childcare grant regardless of age; and Option 3 - allow eligibility to loan and childcare grant regardless of age.

How does each option for mitigation further or hinder equality of opportunity?

Retaining the current arrangements for loans and Childcare Grant would not fully mitigate this adverse impact. However, the new student support proposals include the introduction of means tested bursaries in HE and students over the age of 55 will have equal access to this source of financial support. This will partially mitigate the adverse impact associated with ineligibility for loan but will not address the adverse impact associated with ineligibility for the Childcare Grant.

In terms of the loan option 2 has the same impact as option 1. However, in terms of the Childcare Grant this option would fully mitigate any adverse impact.

Option 3 would mitigate the adverse impact on those over the age of 55 entirely.

How does each option reinforce or challenge stereotypes which constitute or influence equality of opportunity?

In respect of the loans, Option 3 could reinforce any prejudices that exist in society with regard to this age group. There could be a perception that this group is being treated preferentially in that there is a lower probability that loans would be repaid. However, it is unlikely that this perception would extend to the childcare support which is not repayable.

What are the consequences for the group concerned and for the public authority of not adopting an option more favourable to equality of opportunity?

The group concerned would not, on the basis of age, have access to the full student support package. By retaining the current arrangements, the Department would continue to follow the UK lead on this issue.

How will the relevant group be advised of the new or changed policy or service?

The Department annually publishes guidance on the package of student support and this information is made widely available. It is proposed that a guidance service for mature students will be commissioned. In addition, it is proposed that the extent of the financial information provided to students and potential students by the ELBs will be reviewed with the assistance of the NUS-USI. The aim of this review process will, in part, be to ensure that students, regardless of equality group, can make more informed choices regarding their studies.

What are the costs of implementing each option? Will the social and economic costs and benefits to the relevant group of implementing the option outweigh the costs to the public authority or other relevant groups? An evaluation of net social benefits achieved by adopting each option must be considered.

Retaining the current loan and Childcare arrangements would be the cheapest option although, as referred to above, it is likely to be the least effective in tackling the potential adverse impact. Option 3 would be the most expensive as it would incur an additional loan subsidy charge and require legislative change. There may also be an additional cost associated with the extension of the Childcare Grant although this is unlikely to be substantial. Option 2 would be somewhat cheaper than option 3 since there would be no additional cost associated with the student loan subsidy. However option 2 would also require legislative change and there may be an additional cost associated with payment of the Childcare Grant. There are likely to be social benefits associated with both the extensions of the loan and Childcare Grant to those over the age of 55. However, in the case of the extension of the loan in option 3, the opportunity cost and the potential for reinforced prejudices are likely to outweigh any additional social benefits.

Does the public authority have international obligations which would be breached by, or could be furthered by, each of the options?

This question is not directly relevant in this matter.

3. The requirement for those between the ages 50 to 54 to indicate their intention to return to work when applying for the loan

Under the current arrangements for student loans students between the ages 50 to 54 are required to indicate their intention to return to work when taking out a loan. This policy operates on a UK basis. The rationale is that loans are cancelled once the age of 65 is reached and it would not be appropriate or represent best use of resources to make income contingent loans available to students who would not be able to repay them. It has been indicated that this requirement could have an adverse impact on those who have been in receipt of incapacity benefit. The Department has considered three options in relation to this potential adverse impact. These are: Option 1 - retain existing arrangements for loan; Option 2 - retain existing arrangements for the loan but raise the age at which the declaration of intention to return to work is required from 50 to 53; and Option 3 – abolish the requirement to indicate intention to return to work.

How does each option for mitigation further or hinder equality of opportunity?

Retaining the current arrangements for loans would not fully mitigate this adverse impact. However, the new student support proposals include the introduction of means tested bursaries in HE and students over the age of 50 or those with an incapacity will have equal access to this source of financial support. In addition, there is currently a range of support measures in place to assist with the living costs of students with a disability and these are also available regardless of age.

Option 2 would further mitigate the adverse impact by reducing the number of students who are required to make a declaration.

Option 3 would mitigate the adverse impact on those between the ages 50 to 54 entirely.

How does each option reinforce or challenge stereotypes which constitute or influence equality of opportunity?

In respect of the loans, Option 3 could reinforce any prejudices that exist in society with regard to this age group. There could be a perception that this group is being treated preferentially in that there is a lower probability that loans would be repaid. This may also apply, but to a reduced extent, under option 2.

What are the consequences for the group concerned and for the public authority of not adopting an option more favourable to equality of opportunity?

Students in this group would be entitled to the full package of student support but would have to declare their intention to return to work if they wish to apply for a student loan. By retaining the current arrangements, the Department would continue to follow the UK lead on this issue.

How will the relevant group be advised of the new or changed policy or service?

The Department annually publishes guidance on the package of student support and this information is made widely available. It is proposed that a guidance service for mature students will be commissioned. In addition, it is proposed that the extent of the financial information provided to students and potential students by the ELBs will be reviewed with the assistance of the NUS-USI. The aim of this review process will, in part, be to ensure that students, regardless of equality group, can make more informed choices regarding their studies.

What are the costs of implementing each option? Will the social and economic costs and benefits to the relevant group of implementing the option outweigh the costs to the public authority or other relevant groups? An evaluation of net social benefits achieved by adopting each option must be considered.

Retaining the current loan arrangements would be the cheapest option. It would maximise the potential for repayment of loan before the age of 65 is reached. Option 3 would be the most expensive due to the reduced potential for full loan repayment and it would require legislative change. Option 2 would be somewhat cheaper than Option 3 since the reduced potential for full loan repayment would be limited to those aged between 50 and 52. However option 2 would also require legislative change.

Does the public authority have international obligations which would be breached by, or could be furthered by, each of the options?

This question is not directly relevant in this matter.

4. Target support into skill relevant areas through new places in HE and abolition of fee in FE.

One of the primary aims of the new student support proposals is to increase the contribution which HE and FE make to economic development in Northern Ireland by, in particular, increasing the skills base. In this regard, the initial proposals included the introduction of 1,000 additional domestic HE places and the abolition of fees for full-time FE students on courses which are relevant to the skill needs of the Northern Ireland economy. However, it is clear that if the skill relevant areas are defined too narrowly, the above measures could have a differential and more positive impact on men rather than women. For example, in full-time HE and FE there are around twice as many males as females on ICT, Software Engineering, Tourism and Hospitality, Electronics, Construction and Manufacturing/Engineering courses. Research by Harmon and Walker would indicate that the return, in terms of additional earnings, which arises to women who participate in education is greater than for men. This higher rate of return would indicate that more women should be encouraged to take up HE. The Department has considered three options in relation to this potential differential impact. These are: Option 1 – Introduce HE places and abolish FE full-time fees in the areas of Computing, Software Engineering, Tourism and Hospitality, Electronics, Construction and Manufacturing; Option 2 – Introduce HE places in the above key skill areas but widen the abolition of full-time FE fees to all vocational courses; and Option 3 – target additional HE on increasing access so that all the new places are not directed at key skills provision and widen the abolition of full-time FE fees to all vocational courses.

How does each option for mitigation further or hinder equality of opportunity?

It is difficult to judge whether the additional places which will be introduced in HE will be taken up more by males than by females. However, if the pattern of current enrolments is taken as a guide, this would indicate that the targeting of additional places on key skill relevant areas would benefit men more than women. Similarly in FE, if the abolition of full-time fee is targeted on key skill areas, this is likely to be of more benefit to male students.

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Option 2 is the same as Option 1 in respect of HE but in FE the widening of abolition of full-time fee to all vocational courses will reduce the differential gender impact considerably. The current picture for enrolments shows that 48% of full-time FE vocational (over 19) students are female.

Option 3 would be the same as Option 2 in respect of FE but in HE, it would introduce new places beyond the key skill areas. This again would help mitigate any differential impact. Females account for around 57% of all full-time HE undergraduate enrolments but account for around 36% of enrolments on courses within the key skill areas.

How does each option reinforce or challenge stereotypes which constitute or influence equality of opportunity?

Under all three options the Department will consider with the sector ways in which more women can be attracted into the key skill areas. In the interim, Option 3 is likely to have the most positive effect in terms of encouraging access to HE and FE from females as well as males.

What are the consequences for the group concerned and for the public authority of not adopting an option more favourable to equality of opportunity?

Concentrating on the key skill areas is likely to attract, in the short term, more males than females into HE and FE.

How will the relevant group be advised of the new or changed policy or service?

The Department annually publishes guidance on the package of student support and this information is made widely available. It is proposed that the extent of the financial information provided to students and potential students by the ELBs will be reviewed with the assistance of the NUS-USI. The aim of this review process will, in part, be to ensure that students, regardless of equality group, can make more informed choices regarding their studies.

What are the costs of implementing each option? Will the social and economic costs and benefits to the relevant group of implementing the option outweigh the costs to the public authority or other relevant groups? An evaluation of net social benefits achieved by adopting each option must be considered.

In HE the cost is not likely to vary significantly between the three options since there will continue to be 1000 additional students introduced. In FE the abolition of fee for all full-time vocational courses (as per Options 2 and 3) will be somewhat more expensive than Option 1. Option 3 is likely to deliver the greatest equality of opportunity and will continue to meet the overall aims of the student support policy in terms of encouraging participation in vocationally relevant areas in FE and encouraging wider access in HE.

Does the public authority have international obligations which would be breached by, or could be furthered by, each of the options?

This question is not directly relevant in this matter.

