

PART II. Monitoring Education for All

Chapter 3 Tackling exclusion:

Side by side but worlds apart:
a boy on his way to school
in Phnom Penh, Cambodia,
passes by a child who scavenges
to earn a livelihood.

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lessons from country experience



Education for All, as conceived at the 2000 World Education Forum in Dakar, requires an inclusive approach that emphasizes the need to reach groups that might not otherwise have access to education and learning. This chapter offers some examples of policies and programmes that have been effective not only in advancing education generally, but more particularly in identifying and overcoming barriers that deprive marginalized groups of the same learning opportunities as others. A sound education plan is essential for promoting inclusion. Such plans require the equitable allocation of resources, sufficient numbers of trained and motivated teachers, and a comprehensive approach encompassing all the EFA goals.

Country plans contain many proposals to attract more children to school

Reaching the unreached: what do government plans say?

National education plans of forty-five countries, including the twenty with the highest numbers of out-of-school children, were reviewed to see which categories of children and adults governments consider marginalized (UNESCO-IIEP, 2006).¹

The groups of children and adults whom governments categorize as marginalized vary according to region. Girls and women are identified as the priority target group in sixteen sub-Saharan and four East Asian and Pacific countries. In South and West Asian countries, in the Arab States and in Turkey, governments have identified girls and women, children with special needs, working children, and migrant and nomadic families living in dispersed settlements and rural areas as target groups. In Latin

America and the Caribbean, children of ethnic and linguistic minorities, and populations living in dispersed settlements or rural areas are identified as marginalized, along with some additional categories of girls, including pregnant teenagers. In a majority of countries, girls and children living in dispersed settlements in rural areas are mentioned most often as being marginalized, the former group by twenty-four countries and the latter by twenty-one. Other potential groups, such as orphans, HIV-positive children and child sex workers, are rarely singled out. Box 3.1 describes characteristics of children regarded as being particularly marginalized in Ethiopia, India, Nigeria and Pakistan.

The country plans contain many proposals to attract more children to school. One of the most common approaches (cited in twenty-two countries) is to reduce both the direct costs and the opportunity costs of education through measures such as the abolition of tuition fees and the provision of learning materials and uniforms, and the introduction of demand-enhancing measures such as free school meals and scholarships. Eighteen countries list measures to address cultural obstacles to education, notably for girls, such as increasing the number of female teachers and ensuring that schools are girl-friendly. Eight countries, mostly in Latin America and the Caribbean, intend to introduce local languages into the curriculum. Another eight plan to raise demand for education through information campaigns targeted at parents and the wider community.

National plans also discuss some of the key government strategies to overcome the many barriers faced by people living in remote areas. Fifteen plans identify increasing the number of schools accessible in remote locations as a key priority. Strategies also include building more boarding schools and local village schools, designing mobile classrooms and introducing bus services. In addition, six countries intend to introduce flexible school schedules and calendars, notably in areas where children work on farms.

Programmes for educationally excluded youth are increasingly common (cited in twenty-five countries). These provide accelerated education for older children, usually those aged 9 to 14. For example, Senegal and Guatemala plan to introduce literacy courses coupled with vocational training or income-generating activities to allow early school leavers to catch up with formal education at the lower-secondary level.

Box 3.1: Marginalized children in Ethiopia, India, Nigeria and Pakistan

Ethiopia, India, Nigeria and Pakistan account for a significant proportion of the world's out-of-school children. These countries' education plans target particular groups of children as the most marginalized.

- Ethiopia: Over-age school children; pastoralist children; school dropouts; girls; working children; children in villages with no or distant schools; poor children
- India: Working children; children who cannot afford school fees; hard-to-reach groups such as children living in small settlements or remote areas where no schooling is available; children of migrant families; children in coastal fishing communities; children with special needs; girls; scheduled caste/scheduled tribe children; urban deprived children; children from minority groups; children living below the poverty line
- Nigeria: Children of indigenous and nomadic populations; children enrolled in Koranic schools; disabled children; girls
- Pakistan: Disadvantaged children in rural and urban areas, with an emphasis on out-of-school girls and illiterate girls and women; working children

Sources:

Ethiopia: Ministry of Education (2002), Ministry of Finance and Economic Development (2002); **India:** Ministry of Human Resource Development (2003); **Nigeria:** Ministry of Education (2004); **Pakistan:** Ministry of Education (2003).

1. The review was conducted for this Report by the UNESCO International Institute for Educational Planning. It focused only on published government documents and did not necessarily include all planning documents, so it may not capture all government attention to the marginalized in all forty-five countries.

Legislative and constitutional barriers to education still exist in many countries. Forty-three countries have no constitutional guarantee of free and compulsory basic education, while thirty-seven limit education to citizens and legal residents, discriminating against the children of migrants, guest workers and temporary residents.² A birth certificate is still legally required for enrolment in many countries, denying access to those without the relevant documents (UNESCO, 2005b).³ Girls also suffer from specific discriminatory legislation: pregnant girls are routinely expelled from school in many African countries.

Tackling exclusion:⁴ promising policies and programmes

While many countries have made considerable progress in introducing policies that focus on the educational needs of marginalized children and youth, serious barriers to enrolment, retention and attainment persist. This section examines

some key policies that have been used to overcome these barriers for disadvantaged groups, most notably the very poor and, in particular, girls, orphans and vulnerable children affected by AIDS, those engaged in child labour, youth who missed out on formal education, children and youth caught in armed conflict, and children with disabilities (Table 3.1). Some are universal (such as abolishing school fees) while others are targeted. Many of the examples are elaborated on elsewhere in the chapter.

Lowering the cost of education to individual households

The number of children out of school in the poorest 20% of households is more than triple that in the richest 20% (UIS/UNICEF, 2005). Direct costs to households remain a significant barrier to primary school access and attainment in more than ninety countries. Direct costs include five types of fees (for tuition, textbooks, compulsory uniforms, parent-teacher associations or community contributions, and school-based activities such as exams). A survey of ninety-four

2. The figures are taken from the report of the Special Rapporteur on Education, UN Commission on Human Rights (2002). It is important to note that the lack of constitutional guarantees does not imply that education is not provided. Nonetheless, the existence of constitutional guarantees is a significant marker of the extent to which countries consider education to be a fundamental human right that should be protected.

3. Children may lack birth certificates for many reasons, which vary by country. A certificate is often not perceived as a fundamental right, or it may require a payment not all families can afford (see UNESCO (2005b) for a detailed discussion).

4. Exclusion results from interrelated factors such as poverty and economic deprivation, gender inequality, geographic and physical location, political and legal conditions, cultural factors, disease and health constraints. Some factors relate to the availability of good schooling, its cost and the provision of learning resources. Others relate to household characteristics such as household income and parental motivation. Some causes of exclusion are general and interrelated; for example, girls who are out of school are also found in rural areas and many are infected or affected by HIV/AIDS. Other factors affect particular groups such as ethnic or linguistic minorities. See Sayed et al. (Forthcoming) for a discussion of the concept of exclusion in South Africa and India.

Table 3.1: Some policies to tackle exclusion*

Policy goal	Type of intervention	Examples
Reduce the direct costs of schooling	Abolishing school fees or providing school fee waivers	Measure by the Government of Burundi abolishing primary school fees in 2005
Create financial incentives, offsetting household costs, to stimulate demand for schooling	Providing grants or scholarships for members of marginalized groups	The Gambia's Scholarship Trust Fund for Girls
	Providing financial incentives for orphans and vulnerable children	Bursary programme in Swaziland
Create incentives to overcome the need for child labour	Providing cash grants and supporting community-based efforts for child labourers	Balijothi programme in Andhra Pradesh, India, enabling children and youth to enter schools Bolsa Escola (merged in 2004 with other income transfer programmes) cash grant programme in Brazil, providing income support to poor families to encourage school attendance
Provide non-formal education opportunities for youths and adults who have missed out formal schooling	Providing bridging education for youths and adults	Equivalency education programmes in Indonesia giving young people and adults a second chance to obtain education Educatodos community school programme in Honduras, giving youths and adults who dropped out a chance to complete basic education
Provide relevant education opportunities for children and youths affected by conflict	Offering programmes to meet the needs of children and young people in post-conflict situations	Healing Classrooms Initiative in northern Ethiopia, providing support for the psychosocial and education needs of children in refugee camps
Provide appropriate education opportunities for the disabled	Offering education opportunities that respond to the needs of the disabled	Inclusive Education Fund in Uruguay, integrating the disabled into mainstream education

* The table indicates some of the main types of measures being used to lower barriers to education. They are not mutually exclusive and may be applied to other contexts or groups. For example, stipend programmes may be a viable strategy in conflict-affected contexts for demobilized children and youth.

Table 3.2: Tuition and other costs to households for education in Malawi (2002), Nigeria (2004), Uganda (2001) and Zambia (2002)

	Tuition	Parent-teacher association	School development fund	Examination fees	Boarding fees	Uniforms/clothing	Books/Supplies	Transport	
Percentage of students whose households spent money on each item for primary education									
Malawi	1	–	57	3	0.3	69	83	1	
Nigeria	14	70	29	39	0.2	88	99	5	
Uganda	13	16	57	19	1	79	98	3	
Zambia	73	67	–	2	0.2	81	98	2	
Percentage of total annual household expenditure during primary education									
Nigeria	7	1	1	1	–	3	3	58	
Uganda	9	2	3	2	4	6	5	31	
Zambia	10	1	–	2	–	8	4	–	

Sources: Malawi National Statistics Office and ORC Macro (2003), Nigeria National Population Commission and ORC Macro (2004), Uganda Bureau of Statistics and ORC Macro (2001) and Zambia Central Statistics Office and ORC Macro (2003).

Between 2000 and 2005 many countries abolished school fees

countries reveals that only in sixteen countries are none of these charged (World Bank, Forthcoming). Other household costs include transport and food. The relative importance of household expenses varies considerably (UNESCO, 2005b). Table 3.2 compares costs of various items in Malawi, Nigeria, Uganda and Zambia. In Nigeria and Uganda, transport is the largest cost item, while in Zambia it is food. In Viet Nam, household expenditure constitutes 44% of total public and private spending on primary education, a large proportion being for textbooks and uniforms. In India, household expenditure constitutes 43% of spending, with tuition and textbooks representing the largest share (Bentaouet-Kattan and Burnett, 2004).

Households' ability to pay may be seasonal. In Zambia, the need for educational expenditure peaks between January and March. Not only are rural incomes at their lowest at that time, but also it is necessary to buy food and anti-malaria medicine.

Between 2000 and 2005 many countries abolished school fees, including Lesotho (2000), Timor-Leste (2001), the United Republic of Tanzania (2001), Cambodia (2001), Zambia (2002), Kenya (2003), Madagascar (2003), Benin (2004), Mozambique (2004), Viet Nam (2004) and Burundi (2005). In Kenya, 1.2 million additional students entered the school system after the measure took effect. In Burundi, almost 500,000 additional primary school pupils arrived to enrol on the first day of school, double the number anticipated. Removing school fees increases enrolment but also makes it necessary to plan for the surge in order to maintain adequate

quality. To reduce the cost of education to parents and in response to the 1992 Constitutional provision of making education free and compulsory, the Ministry of Education and Sports in Ghana introduced, in 2004, a pilot capitation grants programme to forty selected deprived districts. The capitation grant was provided to schools to abolish all school levies such as charges for school-based extra-curricular activities. This programme was judged to be successful and as a result extended to all 138 districts in the country. By 2005, enrolments in basic education increased from 3.7 million to 4.3 million, an increase of about 16% (Ghana Educational Services, 2005).

Providing financial incentives can increase access for the marginalized

Many studies highlight the link between educational outcomes and poverty. For example, a longitudinal study of primary school attainment in rural areas of the Punjab and North West Frontier provinces in Pakistan concludes that economic constraints on households are a key factor in explaining high dropout rates. The sudden loss of remittances from a household member or the birth of an extra sibling both significantly increase the likelihood of dropout (Lloyd et al., 2006). Similarly, a 2002 survey of 1,000 rural and urban households in five regions of Ethiopia shows that household wealth is the major determinant of whether 8-year-olds are in school.⁵ Child enrolment is also affected by household size, birth order, livestock ownership and the ability of the household to absorb economic shocks (Woldehanna et al., 2005).

5. The Young Lives study of childhood poverty in Ethiopia (Woldehanna et al., 2005) analysed data from a survey of 8-year-olds in twenty 'sentinel' sites in the Addis Ababa, Oromia, SNNP (Southern Nations, Nationalities, and People), Amhara and Tigray regions. The sentinel sites were targeted poor areas identified through criteria for the government's food insecurity designation.

	Food	Private tutoring	School reports	Sport fund	Maintenance fees	Furniture, tools, etc.	Other	
Percentage of students whose households spent money on each item for primary education								
	34	4	15	–	–	–	2	Malawi
	62	23	–	–	18	14	14	Nigeria
	20	5	–	–	–	–	22	Uganda
	24	12	–	24	10	–	4	Zambia
Percentage of total annual household expenditure during primary education								
	18	5	–	–	1	1	1	Nigeria
	14	17	–	–	–	–	6	Uganda
	62	13	–	1	–	–	1	Zambia

Well-targeted and -managed cash incentive programmes can be important equity-promoting measures

Providing financial incentives for enrolment by offsetting household costs is, therefore, an excellent strategy to increase access for the marginalized. Examples of such targeted incentives include direct monetary transfers as well as cash stipends and scholarships or bursaries, as in Brazil, Colombia, Kenya, Mexico, Nicaragua and Pakistan. They can be conditional on specified levels of school participation, attendance or achievement. Financial incentives can also take the form of vouchers to be exchanged for specific education or health services.

The effects on primary school enrolment and retention are greater in countries with relatively low enrolment, such as Bangladesh and Nicaragua, than in those with a higher enrolment ratio, such as Mexico. Financial incentives can also have a positive effect on secondary school enrolment, particularly for girls. Evidence of the impact of large-scale cash incentive programmes is limited mainly to Latin America (Chapman, 2006).⁶ Well-targeted and -managed cash incentive programmes can be important equity-promoting measures.

Financial incentives help orphans and vulnerable children enrol

An orphan is 13% less likely to attend school than a non-orphan. In sub-Saharan Africa just under 10% of children under the age of 17 have lost at least one parent to HIV/AIDS (UNAIDS, 2006). In Kenya, children's school participation fell by 5% upon the death of a father and by 10% upon the death of a mother (Evans and Miguel, 2005). Governments and NGOs in

Box 3.2: Stipends and scholarships increase education access for girls

In the Gambia, the Scholarship Trust Fund for Girls is designed to increase girls' access to, retention in and performance during upper basic and secondary education. In low-income regions, the fund awards full scholarships for tuition, books and examination fees to one-third of the girls in schools with low enrolment. In less deprived regions, 10% of the girls who excel in science, technology and mathematics receive full scholarships. In 2004, more than 13,800 lower-secondary girls and more than 2,600 upper-secondary girls received scholarships. As a result of the programme, girls' enrolment in three regions rose from 32% in 1999 to 65% in 2004/05 at lower-secondary level and from 11% to 24% at upper-secondary level.

Source: World Bank (2005b).

countries with high rates of HIV-prevalence have introduced measures that support the educational needs of orphans. Swaziland has a comprehensive bursary programme (Box 3.3). In Zambia, where more than 15% of children under 15 have lost at least one parent to HIV/AIDS (DeStefano, 2006), a programme transferring cash to the most vulnerable households (often grandparents caring for children affected by AIDS) reduced school absenteeism by 16% in nine months (Chapman, 2006). In addition to directly affecting school attendance, this type of programme has important indirect effects on education by improving young children's health, nutrition and living conditions.

⁶ Less rigorous evidence is available for other low-income countries, though some research on scholarship programmes has been done in the Gambia, Bangladesh, Indonesia and Malawi, among others (Chapman, 2006).

Eliminating or reducing the need for child labour can improve school attendance

Child labour⁷ is directly related to widespread chronic poverty. While its incidence has declined in recent years, there are still around 218 million child labourers, three-quarters of whom are under age 15 (ILO, 2006).⁸ It is estimated that almost 60% (126 million) are victims of what are deemed the worst forms of child exploitation.

Box 3.3: Bursaries for orphans and vulnerable children: the Swaziland experience

Swaziland has the world's highest prevalence of HIV and AIDS, with an overall rate of HIV infection among adults (aged 15 to 49) of 42.6% in 2004, compared to 16.1% a decade earlier. The annual growth rate in the number of orphans has doubled since 2000. The impact on education is likely to be considerably greater than in many other countries because Swaziland still levies fees for primary and secondary schooling. With the incidence of poverty at around 75% in rural areas and 50% in urban areas (in 2000/2001), school affordability is a critical issue.

Faced with these conditions, the government in 2002 began to provide bursaries for orphans and other vulnerable children attending primary and secondary schools. Total funding increased very rapidly, from US\$0.22 million in 2002 to US\$7.5 million in 2004.

By 2005, five out of six double orphans and three out of four paternal orphans received bursary support and enrolment and retention rates have either improved or remained stable, though it had been widely anticipated that the HIV/AIDS pandemic would result in significant declines.

Concerns remain, however, about the effectiveness and efficiency of the programme. Some eligible children have not applied because they cannot furnish their own birth certificate and the death certificate(s) of their parent(s). Also, only children already enrolled can receive bursaries, a condition originally justified because there were not enough classrooms and teachers to accommodate more children. Mismanagement and abuses of bursary funds have been widespread, including claims for non-existent children, multiple claims for the same student, double sponsors, duplication of claim vouchers, claims for non-vulnerable children of teachers, civil servants and local politicians, over-inflation of school fees by head teachers and generally very poor accounting practices. Poor selection criteria and procedures have compounded these problems. Moreover, some school administrators and teachers are not sympathetic to these children's needs. If total school charges exceed the value of the bursary, as is frequently the case, children who cannot pay the balance may be sent home.

Source: Bennell (2005).

There are two principal ILO conventions that directly address the issue of child labour: the Minimum Age Convention of 1973, ratified by 147 countries, and its accompanying recommendation; and the Worst Forms of Child Labour Convention of 1999, which has been ratified by 162 countries. The Minimum Age Convention is significant because it compels countries to pursue national policies to abolish child labour. Moreover, it sets the minimum age at which children can work, defining it as the age at which compulsory schooling ends in any country, and stating that no child under age 15 should be working. The 1999 Convention compels all signatory countries to eliminate trafficking of children, debt bondage, child slavery and prostitution, and other illicit forms of child labour.

Many countries have introduced cash subsidy programmes to increase school enrolment and attendance by removing or reducing the need for children to work. Brazil, for example, has several programmes designed to reduce poverty and inequality by linking a minimum level of income support for poor families to compliance with key human development objectives, such as school attendance and health visits. The Bolsa Escola programme was designed to stimulate regular school attendance, reduce child labour and increase educational attainment through financial incentives to poor families. By 2002 almost all Brazilian municipalities had joined the programme, which provided assistance to the households of 5 million children (Cardoso and Portela Souza, 2003). In 2004, Bolsa Escola was merged with several other income transfer programmes to form the Bolsa Família programme.⁹ Since the early 1990s child labour has declined and school attendance increased. In 2000, 92% of girls and 84% of boys aged 10 to 15 attended school and did not work, while 5% of girls and 9% of boys attended school and worked. The cash transfer programme has enabled children who previously were out of school and working to attend school (Cardoso and Portela Souza, 2003).

7. Child labour is defined by the 1973 ILO Convention 138 which sets the minimum age for employment at no less than the age of completion of compulsory schooling and no less than 14 years.

8. There were 246 million child labourers in 2000.

9. The Bolsa Família programme offers a single benefit to poor households that meet conditions such as school attendance. While each of the former programmes had its own emphasis (e.g. promoting schooling, health care or nutrition), all provided cash transfers to roughly the low-income group. Evaluations of the new programme are not yet available.

Community efforts that provide flexible and responsive forms of schooling are also important strategies to tackle child labour, as the example of the Baljyothi programme in India demonstrates (Box 3.4).

A second chance at learning for adults and young people

Many adolescents are not in school and do not benefit from any non-formal learning opportunities. In Bangladesh, India, Nepal and Pakistan alone, this is the case for some 250 million youngsters aged 11 to 18 (Robinson, 2004). Adults and young people need a second chance to access education. A variety of non-formal 'bridging' programmes offer equivalency education to people who were once in primary school but did not complete the cycle. For example:

- Indonesia's 2003 Education Law provides for non-formal education to replace, complement and/or supplement formal education (Indonesia, 2003). Equivalency education offers programme packages equivalent to primary, lower-secondary and upper-secondary education. In 2005, over 500,000 persons participated. However, fewer than 25% of the participants took the national examinations that year (Indonesia Ministry of National Education, 2005; Yulaelawati, 2006).¹⁰
- Uganda has a three-year programme of Basic Education for Urban Poverty Areas, offering non-formal basic education to urban out-of-school children and adolescents aged 9 to 18. It is module-based and contains adapted versions of the main subjects taught in primary schools, as well as pre-vocational training (Katahoire, 2006).
- Since the mid-1990s India's Open Basic Education (OBE) programme has targeted neoliterates who have successfully completed literacy and post-literacy programmes. Participants may choose to learn in Hindi, English or a regional language, and there is no upper age limit. The programme offers education on three levels, each equivalent to a level of basic education in the formal school system.¹¹ Participants may take examinations whenever they feel prepared. The Ministry of Human Resource Development and employers recognize the OBE certificate, which may also be used to enter secondary and post-secondary education.

Box 3.4: Tackling child labour in Andhra Pradesh: the Baljyothi programme

Andhra Pradesh has more working children than any other state in India. By 2000, 20% of children aged 5 to 14 in the state worked full time, and 60% of these had never attended school. Just over half were girls. The state government collaborated with an NGO, Pratyamnya, in an effort to provide education opportunities to all working children aged 10 to 14. The Baljyothi programme is the result.

Baljyothi has opened about 250 schools for working children in slum areas that lack public schools. It relies on strong community backing and uses a variety of strategies to attract children. The schools follow the government curriculum so that pupils can eventually transfer to public schools; 1,110 did so in 2000, five years into the programme. By then, over 31,000 children were enrolled in Baljyothi schools – 18,473 girls and 12,696 boys. In the slum of Borabanda, where Baljyothi started, only 200 children were out of school in 2000, down from 6,000 when the programme began.

Source: Jandhyal (2003).

- In 1995, the government of Honduras established Educadodos, an alternative programme that targets the 540,000 out-of-school youth and adults (age 19 or above) who have not completed nine years of basic education. It operates in a variety of locations, including factories, microenterprises, NGOs, government installations, vocational centres and schools, making it easy for learners of all ages to attend. All learning is student-centred. A flexible schedule requires an average of two and a half hours of group work per day. It draws on volunteer facilitators, from varied academic and economic backgrounds, as teachers. They receive a government stipend and transport and food allowances. Educadodos has been highly successful in raising the educational profile of out-of-school youth and adults. Since its inception it has enrolled more than 500,000 students in its primary school programme (grades 1 to 6). The completion rate for this programme averaged 61% between 1996 and 2003 (Schuh-Moore, 2005).

The strength of non-formal education programmes for youth and adults is that they are adaptable to local contexts. They are effective

A variety of non-formal 'bridging' programmes offer equivalency education to people who were once in primary school but did not complete the cycle

10. The 2005 total included 7,290 'target learners' taking Package A (primary), 416,605 studying Package B (lower secondary) and 23,713 taking Package C (upper secondary).

11. OBE level A is equivalent to Classes 1-3, level B is equivalent to Classes 4-5, and level C to Classes 6-8 of the formal school system.

New forms of war practised by armies and warlords alike, target children and youth, seeking to turn them into soldiers

when they are community-based and combine the use of local languages, relevant curriculum and productive work. They face two challenges, however. First, it is important to ensure that they do not place an increased financial burden on the poorest areas and most disadvantaged populations (Rose, 2003). Second, non-formal education is still often perceived as second-rate education, with less-qualified teachers and staff, and inadequate political and financial support.

Providing relevant education for children and youth affected by conflict

Although the number of armed conflicts¹² is in decline worldwide, and wars cause fewer victims today than was the case twenty years ago (Human Security Centre, 2005), armed conflict continues to have terrible consequences on civilian populations: the collapse of law and security, human rights violations, the spread of disease, malnutrition, and an absence of basic education and health services. Most wars are fought in poor countries, with Africa and Asia bearing the heaviest burden (Project Ploughshares, 2005). At the beginning of this century, the battle-related toll in sub-Saharan Africa was greater than the combined deaths and injuries in all other regions (Human Security Centre, 2005).

While the downward trend in military conflicts has led to a continuous reduction in the world's refugee population, currently estimated at 19 million (UNHCR, 2006), it has not had a similar effect on the scale of internal displacement. As of December 2005 some 24 million people were displaced within their own countries as a result of conflict (Internal Displacement Monitoring Centre, 2006).

The nature of conflict is changing. New forms of war (Singer, 2004), practised by armies and warlords alike, target children and youth, seeking to turn them into soldiers (see map page 75). As more young people are drawn into long-term conflicts, education offers an increasingly effective way to reduce tensions, and promote tolerance and other values conducive to peace.

The provision of basic education services during and after conflict must take into account the very specific experiences of war and prepare children and youth for peace and national reconciliation. In Burundi, a peace education programme aims to convey values such as confidence, respect, tolerance and solidarity to teachers and students alike. These values

are integrated into primary school curricula in subjects such as the Kirundi language, art, environmental education, music and sports, and at the secondary level into civics education (Rwantabagu, 2006).

Demobilized child soldiers are another challenge. In Sierra Leone, for example, the United Nations disarmed and demobilized some 48,000 former combatants, including nearly 7,000 children (Becker, 2004). This involved bringing former child soldiers to a demobilization area and immediately transferring them to interim care centres, where they received medical and psychological care and education while efforts were made to reunite them with their families. Children aged 10 to 14 took part in a six-month Rapid Response Education Programme that allowed them to resume their primary education. A Community Education Investment Programme introduced by UNICEF helped community schools provide access. Child protection agencies monitored the process (Caramés et al., 2006).¹³

Significant numbers of girls are involved in many armed conflicts, but few are included in demobilization programmes. Perhaps girls are overlooked because they do not serve in direct combat, or they may be reluctant to participate in rehabilitation because of the stigma of sexual abuse that is a common result of conflict (Becker, 2004). Of the 6,845 child soldiers demobilized in Sierra Leone, only 506 were girls (Caramés et al., 2006).

Reaching the world's disabled

The estimated 600 million disabled persons in the world are limited by both physical and social barriers from participating fully in social and cultural life. Some 80% of the disabled live in developing countries. Estimates indicate that more than one-third of out-of-school children have a disability, and in Africa, fewer than 10% of disabled children are in school (Balescut and Eklindh, 2006). Only about forty-five countries in the world have legislation aimed at assuring the rights of people with disabilities (Schindlmayr, 2006).

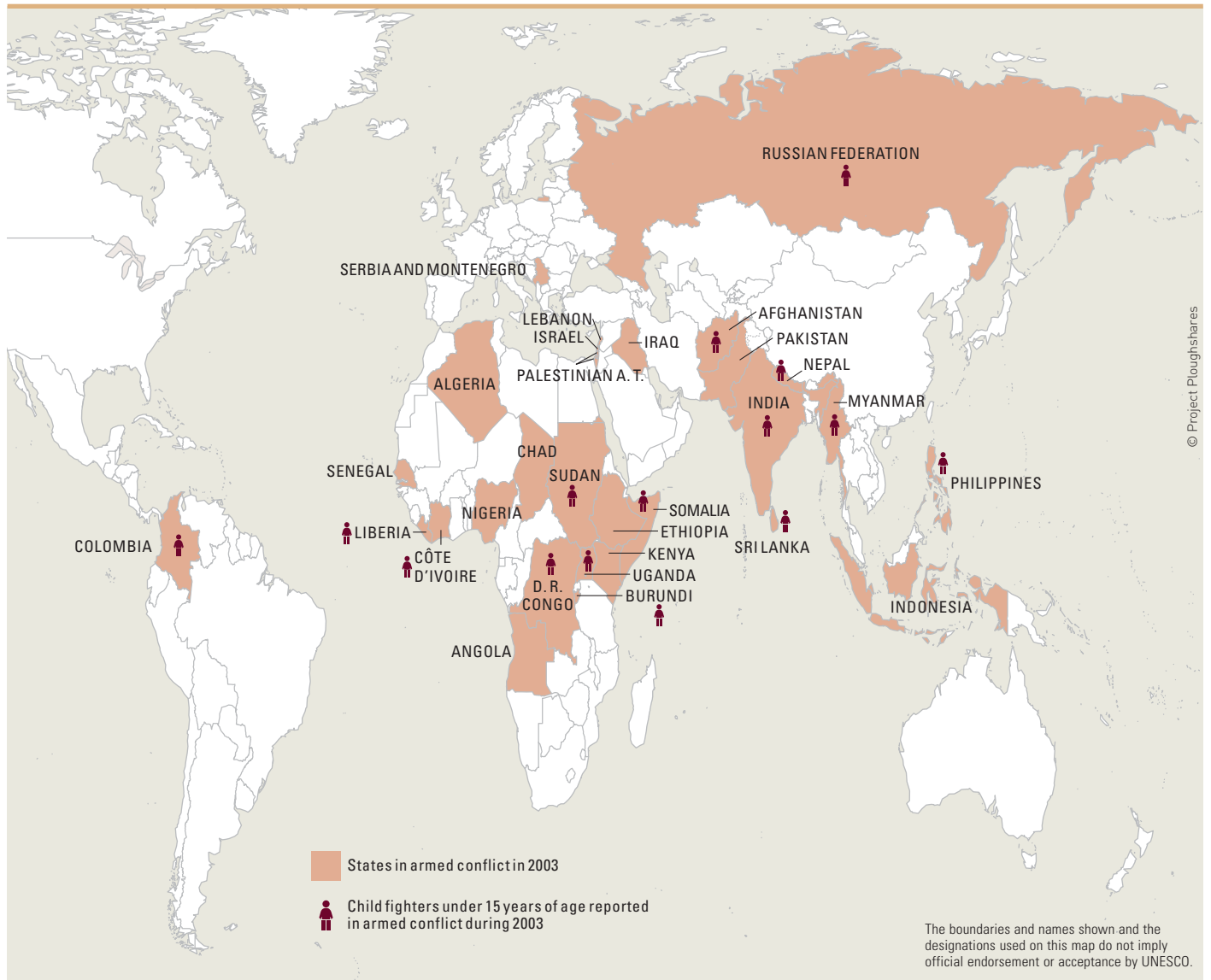
Children with disabilities have the same right to education as all children, as recognized by the Convention on the Rights of the Child, the United Nations Standard Rules for the Equalization of Opportunities and the Salamanca Statement on Special Needs Education (Balescut and Eklindh, 2006). A group is working to draft a human rights

12. An armed conflict is defined as a political conflict in which armed combat involves the armed forces of at least one state (or one or more armed factions seeking to gain control of all or part of the state), and in which at least 1,000 people are killed by the fighting during the course of the conflict (Project Ploughshares, 2005).

13. The Disarmament, Demobilization and Reintegration programme described here was managed by UNICEF and carried out in collaboration with Caritas, the International Rescue Committee, Handicap International and Save the Children UK. It was funded by Ireland, Japan, the Netherlands, Norway, Switzerland and UNICEF.

Map 3.1: Children and armed conflict 2003

The vast majority of armed conflicts involve the use of child combatants under 18 years of age.
In over half of the states at war in 2003 there were reports of combatants under 15.



Based on United Nations map.

Sources: Project Ploughshares (2003); Coalition to Stop the Use of Child Soldiers (2004). Presence of armed conflict in a country does not necessarily mean all children are affected.

convention to promote and protect the rights and dignity of persons with disabilities, a process that was set out in UN General Assembly Resolution 56/168 of 19 December 2001. If adopted and ratified, this first human rights convention of the twenty-first century will ensure that people with disabilities enjoy the same rights as everybody else (Schindlmayr, 2006).

Views differ on how best to overcome exclusion of the disabled. Some mainstream

educationists, as well as some disability organizations, argue that separate, 'specialist' services are needed. They suggest that for people with some types of disabilities (e.g. those with deafness, blindness or both), small specialized units and schools are required. Advocates of inclusive education argue that disabled children do better in mainstream settings rather than in separate ones. Uruguay is an example of a country promoting an inclusive policy (Box 3.5).

Box 3.5: Mainstreaming children with disabilities: Uruguay's example

Uruguay is regarded as a pioneer in Latin America in the integration of physically impaired children into regular classrooms. It formulated its special education policy in 1985, leading to many innovative and progressive initiatives, such as the elimination of classes restricted to children with disabilities. These classes were replaced by mainstream classes offering individual support. Itinerant special education teachers have been introduced to support the learning needs of the disabled students in these classes. Through this initiative, 3,900 children with disabilities have been successfully integrated into regular schools, where they received personalized support.

Uruguay has created an Inclusive Education Fund, which promotes inclusive practices in regular schools to help them to integrate children with disabilities. The country's holistic policy aims to ensure that all children receive a good quality basic education. Despite recent economic problems, Uruguay has continued to fund its inclusive special education policy.

Source: Skipper (2005).

In 2004, over half the 124 developing countries for which data are available were spending less than 4.8% of GNP

Developing sound education plans

The preceding section highlighted promising examples of policies and programmes to remove the barriers that prevent the world's poorest and most disadvantaged children from getting an education. Among the difficulties countries face in carrying out such programmes are the significant administrative cost required to manage them effectively, and the risk of corruption and abuse. Even more importantly, the success of such programmes depends on their being integrated within some kind of comprehensive education plan, which may entail a complete overhaul of the education system itself. To successfully meet the education needs of the marginalized requires multi-pronged strategies. For example, Bangladesh has increased access for girls through a combination of several strategies, including expansion of school availability, encouragement of pluralism in education provision both by public schools and those run by faith-based groups and NGOs, and the use of targeted interventions for girls – such as stipends – that provided incentives by alleviating

demand-side constraints such as the real and perceived high costs of education. Bangladesh has been able to expand the education of girls because its strategies are holistic, multi-pronged and coupled with a commitment to systemic education reform (UNESCO, 2005b).

Overcoming exclusion is not accomplished through a single intervention. Rather, it requires an integrated and comprehensive approach to education planning. What, then, are some key features of a sound education plan? An adequate financial framework and funding, the availability of effective teachers and the capacity to expand secondary education, which are discussed below.

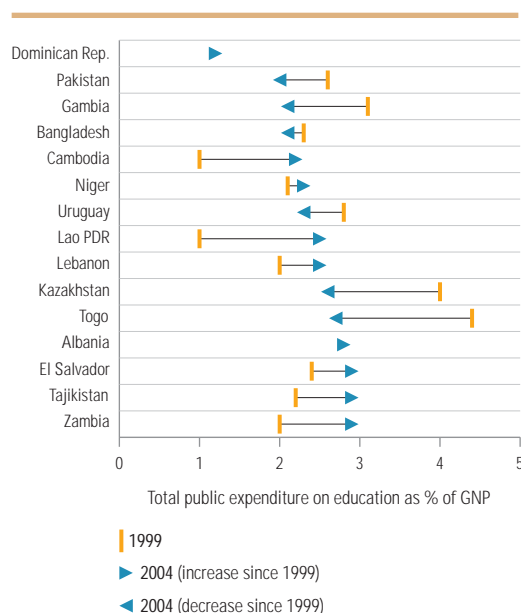
Financing EFA: more and better-targeted spending needed

The levels of public funding for education as a whole and primary education in particular are key indicators of government commitment to the goal of education for all. While there are no clear global benchmarks, most developed countries with advanced education systems typically spend between 5% and 6% of GNP on education. In 2004, over half the 124 developing countries for which data are available were spending less than 4.8% of GNP. In fifteen of these – including several that are far from the EFA goals, such as the Niger and Pakistan – the share was below 3%, and the share was lower even than in 1999 in six of these countries (Figure 3.1). There are exceptions to this pattern. The share of education was over 7% of GNP in Cape Verde, Kenya, Kuwait, Lesotho, Malaysia, Namibia and Tunisia. The overall trend in education expenditure since 1999 has been mixed. Out of the 106 countries with comparable data for both 1999 and 2004, about two-thirds increased public spending on education as a share of GNP, some considerably (Figure 3.2). Increases of 30% or more were registered in eighteen countries.¹⁴ On the other hand, education spending as a percentage of GNP fell in forty-one countries, particularly in Latin America (where the share fell in twelve out of the twenty-one countries with data) and South and West Asia (three out of the five with data).

The share of government expenditure devoted to education is one indicator of its importance in relation to other national priorities. The share ranges from 10% to more than 40% in the vast majority of the countries with data available for 2004 (see annex, Statistical Table 11). Education accounts for one-quarter or more of the government budget in the Comoros, Kenya,

14. Barbados, Benin, Burundi, Cambodia, Cyprus, Georgia, Kenya, the Lao People's Democratic Republic, Lebanon, Madagascar, Malawi, Malaysia, Mexico, Poland, Saint Vincent and the Grenadines, Tajikistan, Vanuatu and Zambia.

Figure 3.1: Countries spending less than 3% of GNP on education, 2004



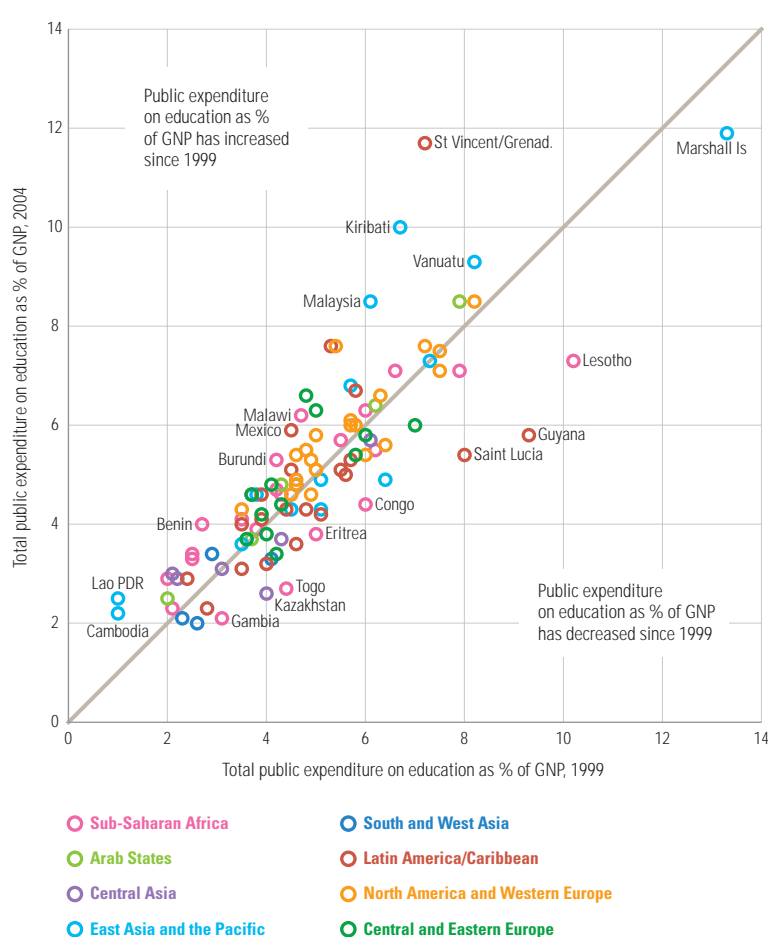
Source: Annex, Statistical Table 11.

Malaysia, Morocco, Oman, Thailand and Tuvalu. At the other end of the spectrum are countries such as the Dominican Republic, the Gambia, Indonesia, Jamaica and Panama, which allocate less than 10% of central government expenditure to education.

About three-quarters of the thirty-six countries with relevant data available increased the share of education in total government expenditure between 1999 and 2004 (Figure 3.3). In Cameroon, Cuba, Georgia, Nicaragua, Tajikistan and Ukraine, the increases were about 30% or more. Substantial decreases (more than a 15% reduction in the share of education) were registered in Azerbaijan, Colombia, the Gambia, India and Peru.

In a majority of the countries that have given a relatively higher priority to education in public spending since 1999, the consequences for the education system have proved to be positive, in the form of improvement in the primary education GER. Other countries, such as India, have managed to increase coverage with no major change in the share of public spending on education and in several countries the share has increased but the GER has decreased. Thus, the efficiency of public spending is as important as the share of education in the total.

Figure 3.2: Total public expenditure on education as a share of GNP



Source: Annex, Statistical Table 11.

The previous section focused attention on the need for government to remove or reduce household costs of education, such as school fees. Many governments have done so. However, such initiatives can have serious implications for public finances (Box 3.6).

Balanced spending across levels and regions is needed

While the percentages of GNP and total government expenditure allocated to education are important indicators of commitment, equally significant is the distribution of education spending across the different levels of the system, and across regions and subregions.

Most of the countries for which data are available allocated less than 50% of their total education expenditure to primary education in

Figure 3.3: Change in public expenditure on education in selected countries and change in GER in primary education between 1999 and 2004



Sources: Annex, Statistical Tables 5 and 11.

2004 (Figure 3.5). This is particularly worrying for those still far from the EFA goals, such as Eritrea and Kuwait. Public spending on primary education as a percentage of GNP is below 2% in three-quarters of the ninety countries with data available – an alarming figure in those countries not on track to achieve UPE. Countries in that category spending less than 2% include Bangladesh, the Islamic Republic of Iran and Nepal in South and West Asia and sixteen countries in sub-Saharan Africa (among the countries with data).

The competition for resources between primary and secondary education in particular is likely to intensify, as the spread of UPE will require expansion at secondary level (discussed later in this chapter). This shift is already perceptible in countries that have reached or are close to reaching UPE (Figure 3.6). In some countries where primary education is not yet universal, however, such as Bangladesh and Nepal, the share of primary education has nevertheless fallen since 1999. Even if primary education is the priority in most countries, expenditure at this level worldwide still seems far from what is required to accelerate progress towards EFA.

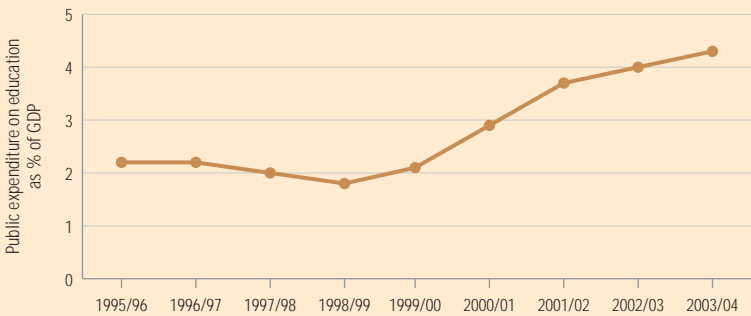
Teachers for EFA: a crucial but undervalued resource

Chapter 2 showed that the serious shortage of trained teachers is a barrier to reaching the EFA goals, particularly in sub-Saharan Africa. Key strategies exist to enhance the motivation of teachers, particularly those working in rural areas.

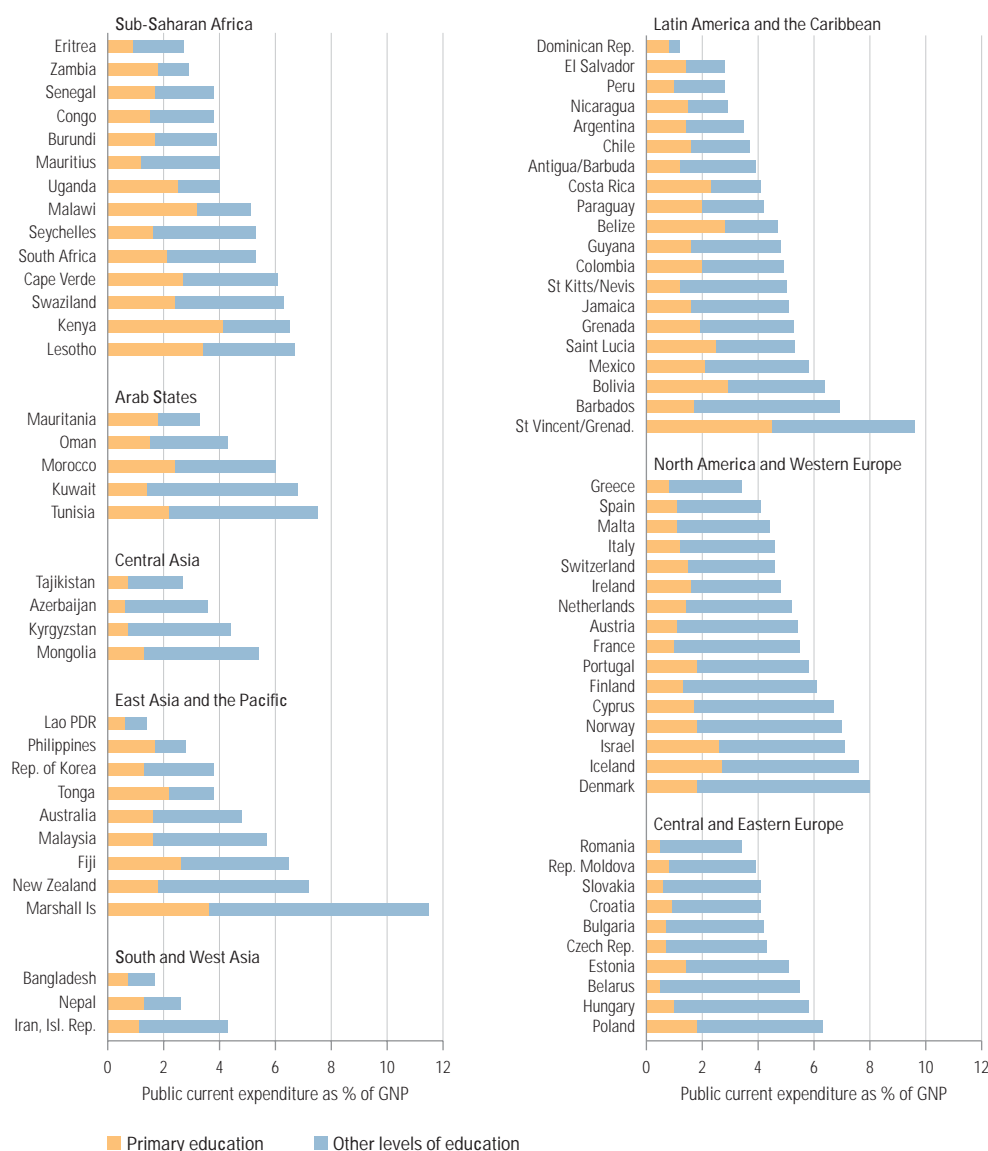
Box 3.6: Education financing and the removal of school fees: the Tanzanian experience

The United Republic of Tanzania abolished school fees in 2001, resulting in a large increase in enrolment but also forcing up public spending very rapidly to offset the lost fee revenue. Public spending on education grew from 2.1% of GDP in 2000 to 4.3% in 2004 (Figure 3.4). Tanzanian spending on education as a percentage of GDP and of overall public spending shows the increasing importance of education in its national priorities particularly in light of the removal of school fees.

Figure 3.4: Priority given to education in public spending by United Republic of Tanzania, 1995/96–2004/05



Source: United Republic of Tanzania (2005).

Figure 3.5: Primary education as a share of total spending on education in selected countries

Note: Countries are ranked in increasing order of total spending on education as % of GNP.
Source: UNESCO Institute for Statistics database.

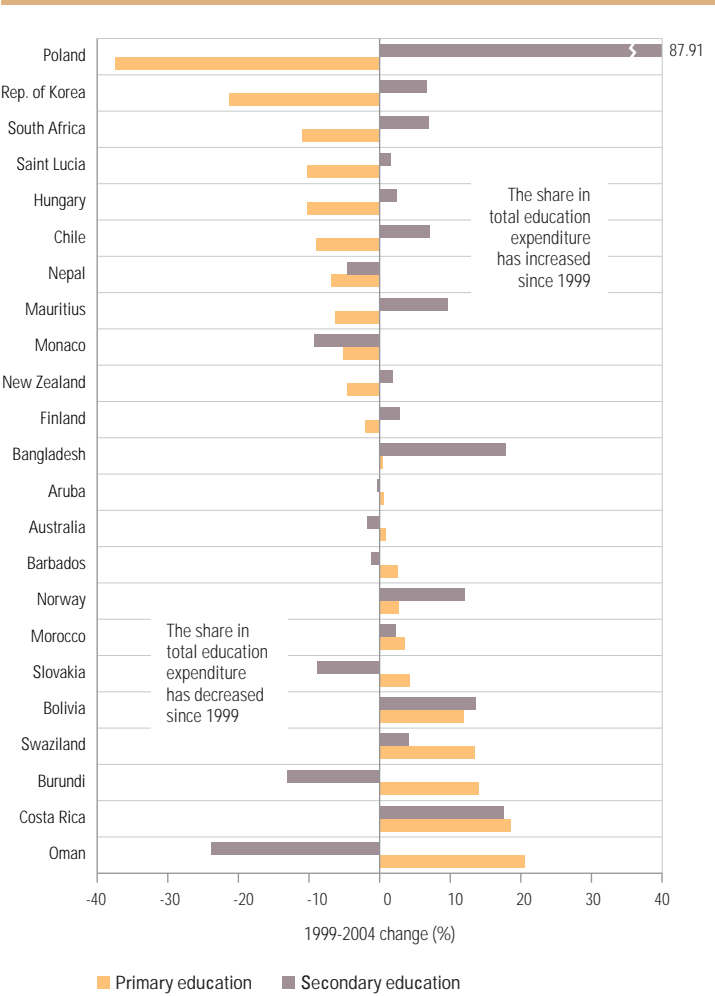
What amounts to a teacher-motivation crisis has far-reaching consequences for EFA

Teacher motivation and incentives

There is growing concern that existing incentives (both monetary and non-monetary) are seriously inadequate both to recruit teachers and to keep teachers fully committed to their work in the regions with the greatest EFA challenges. That is the main finding of research in Ghana, India, Lesotho, Malawi, Sierra Leone, the United Republic of Tanzania and Zambia (Bennell and Akyeampong, 2006). In five of these countries, well over one-third of teacher respondents

indicated that teachers at their school were 'poorly' or 'very poorly' motivated. Motivation levels among primary school teachers varied considerably within each country. What amounts to a teacher-motivation crisis has far-reaching consequences for EFA. A key finding is that working in rural schools is more difficult and demotivating than teaching in urban schools, mainly because of poor living and working conditions. The unattractiveness of living and working in rural areas means most teachers

Figure 3.6: Expenditure on primary and secondary education as % of total current education expenditure. Changes between 1999 and 2004 in selected countries.



Source: UNESCO Institute for Statistics database.

strongly resist rural postings. Consequently, rural schools have relatively fewer qualified and experienced teachers (Table 3.3), teacher turnover is higher and, with higher vacancy rates, teachers have to work harder than their urban colleagues. Box 3.7 describes strategies to increase incentives for rural teachers.

Several Latin American countries have introduced incentive strategies to increase teacher supply and improve the performance of teachers in general, not just those in rural areas. Brazil's finance equalization reform provides funding to state and local governments for hiring, training or salary increases (Gordon and Vegas, 2005). Chile and Mexico have performance-based incentive

systems (McEwan and Santibañez, 2005; Mizala and Romaguera, 2005). Decentralization and school-based management policies introduced in El Salvador and Honduras have increased teachers' participation in decision-making and improved their professional status (di Gropello and Marshall, 2005; Sawada and Ragatz, 2005). In 1996, Chile introduced a policy of monetary incentives for schools and teachers, the Sistema Nacional de Evaluación del Desempeño (National School Performance Assessment System). Preliminary evidence shows a positive effect on student performance. The teacher incentive policy was introduced after increases of about 156% in basic salaries for teachers, which resulted in more applicants of better quality for teacher education programmes. One important effect of this incentive programme is that teachers are more receptive to a performance-related pay system (Mizala and Romaguera, 2005).

Increasing the supply of teachers by reforming teacher training

A strategy to increase the supply of teachers is to reduce the length of time spent on pre-service training. More and more countries are moving towards shorter and more school-based training. In the United Kingdom, trainee teachers can now spend two-thirds of their training time in schools. In Cuba, all pre-service training is school-based (UNESCO, 2005). The integration of training with work is not straightforward, however. It requires significant resources to support those being trained, sufficient schools able to serve as training environments and enough school-based teachers who can act as mentors. The shortening of the teacher training cycle is a growing trend, particularly in sub-Saharan Africa, where countries going this route include Ghana, Guinea, Malawi, Mozambique, Uganda and the United Republic of Tanzania. In Guinea, a primary teacher education programme initiated in 1998 shortened the cycle of initial training from three years to two and delivered increased numbers of new teachers – 1,522 per year compared with 200 before the reform. The teachers trained in the new programme are as effective as those who graduated from the three-year one, and the programme is considered cost-effective in part because of a higher ratio of student teachers to teacher trainers (Dembélé, 2004).

Table 3.3: Unqualified primary school teachers by location* (percentage, rounded)

Country	Rural	Urban
Ghana	18	4
Lesotho	35	5
Malawi	77	86
Sierra Leone	43	11
U. R. Tanzania	62	29
Zambia	29	9

*As a percentage of the total number of teachers in the schools surveyed in this study.

Source: Bennell and Akyeampong (2006).

Secondary education and the EFA agenda: increasing strains

As more countries approach UPE, the pressure to expand secondary education is rising dramatically, bringing new equity issues to the fore.¹⁵

The mismatch between demand and supply of secondary education

Many studies have demonstrated the benefits of secondary education. It results in greater democracy (Bregman and Bryner, 2006), increases social cohesion (Lewin, 2006), helps achieve the Millennium Development Goals – especially the health-related ones (World Bank, 2005a), sustains household demand for primary education (Lewin, 2006) and contributes to countries' competitiveness in an increasingly global economy (World Bank, 2005a).

Chapter 2 described enrolment in secondary education, making the distinction between the lower-secondary and upper-secondary levels. A comparison of secondary enrolment in developed and developing countries between 1960 and 2000 reveals that the rate of enrolment growth did not keep pace with growth in demand for secondary schooling.¹⁶ The gap between the developed and developing countries with respect to the number of 15-year-olds with at least some secondary education is increasing. South Asia and sub-Saharan Africa lag far behind; indeed, access to secondary education has increased only minimally in sub-Saharan Africa.

A shortage of secondary school places is likely to be a major problem as the number of children completing primary education grows. Projections show that in sub-Saharan Africa, the region with the lowest enrolment ratios, demand for secondary school places will rise significantly – from 0.4 million to 1.0 million in Uganda, for

Box 3.7: Incentives for rural teachers: what works

It is possible to fill posts in rural and remote areas if teachers are adequately compensated and working conditions are improved. Here are some strategies that have been shown to be effective:

- Provision of good-quality housing with running water and electricity. This is probably the most cost-effective way of attracting and retaining teachers at hard-to-staff rural schools.
- Supplementary pay, such as the 20% rural hardship allowance in Kenya and the 5% allowance in Nigeria. Pay supplements have to be sufficiently large to have an effect, however, and this can pose budgetary problems.
- More attractive career structures for primary school teachers, with regular promotions based on clearly specified and transparent performance-related criteria. Teachers who work at hard-to-staff rural schools can, for example, be given accelerated promotion and/or preferential access to professional development opportunities.

Source: Bennell and Akyeampong (2006).

instance, between 2002 and 2008, and from 0.5 million to 1.2 million in the United Republic of Tanzania, where no new fully funded government secondary schools have been built since 1980 (Lewin, 2006). The low level of provision coupled with increasing demand will place a serious strain on education systems. It is critical for governments to begin to establish policies and programmes to cope with the challenge.

Meeting the increasing demand for secondary education will likely require substantial increases in domestic and international financing to developing countries. Cost estimates vary; one study suggests that spending on secondary education will need to rise to an average of 2.3% of GNP in sub-Saharan Africa to reach a 50% transition rate from primary education (Lewin, 2004).¹⁷

Reducing inequity in access and coverage

Amid the growing demand, access to secondary education remains highly inequitable.

Marginalized children (the poor, certain ethnic groups, the disabled and, often, girls) are mainly excluded (Bloom, 2004). In sub-Saharan Africa, the excluded are disproportionately poor, rural and female. About 50% of boys from the highest income quintile complete grade 7, but only 4% of girls from the lowest quintile. About 50% of

15. There is no single approach to the organization of secondary education. In general, countries distinguish between primary, and lower secondary and upper secondary, between basic and secondary, or between primary and secondary. The ages at which compulsory education begins and ends also differ among countries. In Africa, students are expected to stay in school until age 13, on average, compared to the age 16 in Europe. This section takes secondary education generally to be education beyond five or six years of primary schooling. Where it is necessary to distinguish between lower secondary and upper secondary, the section follows the UNESCO Institute for Statistics definitions.

16. This analysis draws on Bloom (2004), which reviews secondary school enrolments between 1960 and 2000 with projections up to 2010.

17. The author points out that the calculations involved do not take into account changes in unit cost that may arise from various reforms, such as changes to the curriculum, or from, for example, changes to the dropout and repetition rates.

urban boys complete grade 7 but only 7% of rural girls (Lewin, 2004).

Many countries have made significant efforts to expand secondary education coverage. The Republic of Korea is an example. Strong political will prioritized the expansion of all education levels, with increased government spending on education (including demand-side financing initiatives such as lotteries to support enrolling poor children in post-primary education) and encouragement of the private sector, within a clear regulatory framework (World Bank, 2005a).

Another example is Bangladesh, which has made significant progress over the past decade, with school enrolments doubling and the share of females in secondary enrolments increasing from 33% to 50%. This progress is attributable to government incentive policies that provide food, along with stipends for females, for disadvantaged families. It is also the result of a public-private partnership through which 95%

of private schools receive public financing (public funds pay 90% of teachers' salaries in all recognized schools). In addition, the management structure of secondary schools is decentralized, to ensure that they respond to local needs (World Bank, 2005a).

South Africa has developed a different type of public-private partnership to increase access to secondary education (Box 3.8).

Conclusion

This chapter has shown that there is no single path for achieving the EFA goals. The routes are as many and diverse as the communities they serve, especially when it comes to reaching those who are marginalized. Successful programmes to tackle exclusion are those that (a) couple targeted programmes together with systemic reforms of the education system, (b) are sustainable and enduring, (c) are carefully monitored and evaluated and (d) are supported by the necessary budgetary commitments.

The examples described here illustrate the creative potential of forming alliances with local communities and civil society, and the power of financial and other incentives to overcome specific obstacles, motivating teachers to work in remote areas or making it easier for the poor, orphans, girls, women, people with disabilities and other excluded groups to gain access to good-quality education that meets their needs.

With many countries increasing primary enrolments, it is more important than ever that policies and programmes designed to provide good-quality education for all, particularly the marginalized, are monitored for equity, effectiveness and impact. Only in this way can resources be allocated to reflect national priorities, make the best use of available financing and ensure that progress towards EFA is sustainable.

Box 3.8: In South Africa, subsidies to private schools can increase access for the poor

The South African Government funds private secondary schools if they provide good-quality education and combat racism. While the public funding is limited, it is very significant for lower-cost providers that could not otherwise make ends meet. South African policy recognizes that private schools are cost-effective for the state: 'If all learners were to transfer to public schools, the cost of public education in certain provinces might increase by as much as five percent' (South Africa Department of Education, 1998: section 56). To receive a subsidy, schools must be well managed, provide a good education, serve poor communities and individuals and be run on a non-profit basis (South Africa Department of Education, 1998: section 64).

Source: Lewin and Sayed (2005).

