Chapter 3  Reaching the marginalized

Compounded disadvantage: low-caste girls face the greatest obstacles, India

On the move: pastoralist communities require flexible solutions

Support makes a difference: more girls in Yemen are now going to school
Who are the marginalized? What are the factors contributing to their exclusion and lack of educational opportunity? This chapter looks at the mutually reinforcing interactions between poverty, gender, ethnicity, geographic location, disability, race, language and other factors that create cycles of disadvantage in education. It also shows how integrated anti-marginalization strategies can enable all children – regardless of circumstance – to enjoy their right to education.
Introduction

Education has the power to transform lives. It broadens people’s freedom of choice and action, empowering them to participate in the social and political lives of their societies and equipping them with the skills they need to develop their livelihoods. For the marginalized, education can be a route to greater social mobility and a way out of poverty. Forged in a society that restricted education on the basis of skin colour and discrimination, Nelson Mandela’s words powerfully capture the role of inclusive education in broadening opportunities and building inclusive societies.

This chapter focuses on marginalization in education. Marginalization is the subject of much debate. There is a voluminous literature on how to measure it and how to differentiate the concept from broader ideas about inequality, poverty and social exclusion. Many important issues have been raised. However, debate over definitions can sometimes obscure the political and ethical imperative to combat marginalization. Writing on the idea of justice, Amartya Sen argues that there are limits to the value of perfecting definitions. ‘What moves us,’ he writes, ‘is not the realisation that the world falls short of being completely just […] but that there are clearly remediable injustices around us which we want to eliminate’ (Sen, 2009, p. vii).

The starting point in this Report is that marginalization in education is a form of acute and persistent disadvantage rooted in underlying social inequalities. It represents a stark example of ‘clearly remediable injustice’. Removing that injustice should be at the centre of the national and international Education for All agendas.

The focus of this chapter is on schools and basic education. While marginalization typically starts long before children enter school and continues into adult life, schools are in a pivotal position. They can play a vital role in counteracting early childhood disadvantage and help break the transmission of illiteracy across generations. But schools can also reinforce disadvantage and perpetuate marginalization.

The experience of marginalization in education today is seldom a consequence of formal discrimination. Legal restrictions on opportunity, such as those that characterized apartheid South Africa, are rare. Yet informal discrimination is widespread. It is embedded in social, economic and political processes that restrict life chances for some groups and individuals. Marginalization is not random. It is the product of institutionalized disadvantage – and of policies and processes that perpetuate such disadvantage.

Half a century ago, governments around the world made a clear statement of intent on education. In the 1960 Convention Against Discrimination in Education, they imposed what amounts to a comprehensive ban not just on discrimination by legal intent, but on processes that have the effect of causing discrimination. As Article 1 of the Convention puts it,

> the term ‘discrimination’ includes any distinction, exclusion, limitation or preference which, being based on race, colour, sex, language, religion, political or other opinion, national or social origin, economic condition or birth, has the purpose or effect of nullifying or impairing equality of treatment in education and in particular:

(a) Of depriving any person or group of persons of access to education of any type or at any level;

(b) Of limiting any person or group of persons to education of an inferior standard.

(UNESCO, 1960, Article 1, para. 1).

Underpinning this provision is the simple but compelling idea of equal opportunity. That idea is at the heart of many international human rights provisions, starting with the 1948 Universal Declaration of Human Rights. The 1989 Convention on the Rights of the Child establishes a binding obligation on governments to work towards fulfilling the right to education ‘progressively and on the basis of equal opportunity’ (United Nations, 1989).
The right to equal opportunity for education is also enshrined in most countries’ national laws and constitutions. Indeed, few human rights are more widely endorsed – and more widely violated.

Millions of children are denied their human right to education for the simple reason that their parents cannot afford to keep them in school. Social and cultural barriers to education form another formidable obstacle. In many countries, the education of girls is widely perceived as being of less value than that of boys, with traditional practices such as early marriage adding another layer of disadvantage. Members of ethnic minorities often face deeply entrenched obstacles to equal opportunity. Denied an opportunity to learn in their own language and faced with social stigmatization, they are set on an early pathway to disadvantage. Millions of children with disabilities across the world also face far more restricted opportunities than their peers, as do children living in regions affected by conflict.

None of these disadvantages operates in isolation. Poverty, gender, ethnicity and other characteristics interact to create overlapping and self-reinforcing layers of disadvantage that limit opportunity and hamper social mobility.

The interaction between marginalization in education and wider patterns of marginalization operates in both directions. Being educated is a vital human capability that enables people to make choices in areas that matter. The lack of an education restricts choices. It limits the scope people have for influencing decisions that affect their lives. People lacking literacy and numeracy skills face a heightened risk of poverty, insecure employment and ill health. Poverty and ill health, in turn, contribute to marginalization in education. So does the fact that the marginalized have only a weak voice in shaping political decisions affecting their lives.

Reaching marginalized children requires political commitment backed by practical policies. When governments met in 1990 at the World Conference on Education for All in Jomtien, Thailand, they recognized the need to overcome extreme inequalities holding back progress in education. They declared that ‘consistent measures must be taken to reduce disparities and called for active commitment to reach “underserved groups”, including the poor, remote rural populations, ethnic, racial and linguistic minorities, refugees and migrants, and those affected by conflict (UNESCO, 1990, Article 3). The Dakar Framework for Action reaffirmed the commitment to “explicitly identify, target and respond flexibly to the needs and circumstances of the poorest and the most marginalized” (UNESCO, 2000, IV, para. 52).

While some countries have made impressive efforts to back up such words by extending educational opportunities to their most marginalized populations, action has generally fallen far short of the commitments made at Jomtien and Dakar. Marginalization has remained a peripheral concern. The assumption has been that national progress in education would eventually trickle down to the most disadvantaged. After a decade of steady but uneven national progress, it is time to abandon that assumption. In many countries, large swathes of society are being left behind as a result of inherited disadvantages. Breaking down these disadvantages will require a far stronger focus on the hard to reach.

Tackling marginalization is a matter of urgency on several counts. The targets for 2015 adopted in the Dakar Framework for Action – including universal primary education – will not be achieved unless governments step up their efforts to reach the marginalized. Sustaining progress in basic education and creating the foundations for advances in secondary education will require a renewed drive to extend opportunity to individuals and groups facing the most deeply entrenched disadvantages. Progress in combating marginalization in education would dramatically improve the discouraging scenario that Chapter 2 describes.

The case for action on marginalization goes beyond the 2015 targets. Extreme and persistent deprivation in education carries a high price for societies as well as for individuals. In the increasingly knowledge-based and competitive global economy, depriving people of opportunities for education is a prescription for wastage of skills, talent and opportunities for innovation and economic growth. It is also a recipe for social division. Marginalization in education is an important factor in the widening of social and economic inequalities. Working towards more inclusive education is a condition for the development of more inclusive societies.

Extreme and persistent deprivation in education carries a high price for societies as well as for individuals.

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The core message of this chapter is that overcoming marginalization must be at the heart of the Education for All agenda. Education should be a driver of equal opportunity and social mobility, not a transmission mechanism for social injustice. The familiar routine of governments endorsing equal opportunity principles, reaffirming human rights commitments and signing up for international summit communiqués on education is not enough. Overcoming marginalization requires practical policies that address the structures of inequality perpetuating marginalization – and it requires political leaders to recognize that marginalization matters. This chapter has four main messages:

- **Governments across the world are systematically violating the spirit and the letter on United Nations conventions obliging them to work towards equal opportunities for education.** The failure of many governments to act decisively in tackling marginalization in education calls into question their commitment to the human right to education – and it is holding back progress towards the Education for All goals. The scale of the marginalization crisis in education is not widely recognized, partly because the marginalized themselves lack an effective voice.

- **Disaggregated data can play an important role in identifying social groups and regions characterized by concentrated marginalization.** All too often education policies are developed on the basis of inadequate information about who is being left behind. Data have a vital role to play in providing an evidence base for developing targeted interventions and wider policies. This chapter sets out a new statistical tool – the Deprivation and Marginalization in Education (DME) data set – that looks beyond national averages to provide insight into patterns of marginalization.

- **Mutually reinforcing layers of disadvantage create extreme and persistent deprivation that restrict opportunity.** Poverty and gender inequalities powerfully magnify disadvantages linked to ethnicity, language, living in rural areas and disability, closing doors to educational opportunities for millions of children. Moreover, stigmatization and social discrimination are potent drivers of marginalization in education.

- **Good policies backed by a commitment to equity can make a difference.** Education systems can play a central role in overcoming marginalization by giving disadvantaged children access to a good-quality learning environment, including properly financed schools, motivated and well-trained teachers, and instruction in an appropriate language. But strategies in education have to be backed by wider interventions, including investment in social protection, legal provisions to counteract discrimination and wider empowerment measures. The challenge is to ensure that education policies and broader anti-marginalization policies operate within a coherent framework.

The chapter is divided into three parts. Part 1 provides a snapshot of the scale of extreme and persistent deprivation in education. Drawing on the DME data set, it measures marginalization by looking at numbers of years spent in school. Part 1 also explores problems in education quality as captured in measures of learning achievement. Part 2 looks at the social and economic processes behind the data. It explores some key forces behind marginalization, including poverty, gender, ethnicity and location. Part 3 provides an overview of policies and approaches that can break down the structures that perpetuate marginalization in education and beyond. While each country is different and there are no ready-made “anti-marginalization” blueprints, there are models for good practice. These models can help inform policy choices for governments seeking to act on the obligation to ensure that all of their citizens enjoy a right to education.
CHAPTER 3

Measuring marginalization in education

Introduction

In all countries, whatever their level of development, some individuals and groups experience extreme and persistent disadvantage in education that sets them apart from the rest of society. They are less likely to enter school, to start school at the correct age or to complete a full cycle of education, and they are more likely to leave school with lower levels of achievement. As well as being a sign of social deprivation in its own right, disadvantage in education is a cause and an effect of marginalization in other areas and a powerful transmitter of deprivation across generations.

Defining who is marginalized is problematic because there is seldom an agreed definition of the term within any one country, let alone across countries. Establishing what marginalization entails in education presents another set of problems. Most people would accept that it encompasses quantitative deprivation, as measured by years in school or the level of education attained. But it also incorporates a qualitative dimension. The marginalized typically demonstrate lower levels of educational achievement. The Convention on the Rights of the Child calls on governments to provide an education that leads to the “development of the child’s personality, talents and mental and physical abilities to their fullest potential” (United Nations, 1989, Article 29). For many children, though, the experience undermines learning potential, disempowers and stigmatizes them (Klasen, 2001).

This section identifies some of the characteristics that predispose individuals and groups to extreme and persistent disadvantage in education. While all countries endorse the principles of equal opportunity and universal rights, the evidence shows that, when it comes to opportunities for education, some people are more equal than others – the marginalized being the least equal of all. Inequalities linked to parental income, gender, ethnicity, race and other factors continue to restrict life chances and fuel marginalization.

Understanding marginalization is one of the conditions for overcoming it. Too often, governments express commitment to equal opportunity in education but fail to monitor what is happening to the individuals and groups being left behind. One of the central messages of this section is that countries need to invest in more robust and consistent data analysis to identify areas of concentrated disadvantage. The new international data set prepared for this Report provides a tool that governments, non-government organizations and researchers can use to make the marginalized more visible.

Using a quantitative analysis of marginalization in low-income developing countries, this section draws on the DME data set to identify individuals and groups facing heightened risk of marginalization, with respect both to absolute deprivation, defined in terms of years in school, and to disadvantage relative to the rest of society. The section looks also at individual and group-based disadvantage with respect to learning achievement. While the dimensions and characteristics of marginalization differ between developed and developing countries, rich countries are also characterized by extreme and persistent patterns of deprivation.

The Deprivation and Marginalization in Education data set

Countries need to invest in more robust and consistent data analysis to identify areas of concentrated disadvantage.

Measuring marginalization in education is not straightforward. Household surveys and other data provide insights into the relationship between poverty, ethnicity, health, parental literacy and other characteristics on the one side and education on the other. But while these are all characteristics associated with marginalization, they do not operate in isolation. The marginalized in education are often poor and female, and from an ethnic minority living in a remote rural area. Understanding how different layers of disadvantage interact is a first step towards breaking the cycles of disadvantage that push people into marginalization.

Invisibility adds to measurement problems. Concentrated in slums or remote rural regions, the marginalized are often hidden from view and government agencies sometimes have limited access to detailed data for monitoring their condition. All too often the same agencies demonstrate a marked indifference to the social circumstances of the marginalized, reflecting the indifference of political elites.

The new DME data set assembled for this Report is a statistical tool that helps chart the dimensions of marginalization and identifies patterns of
individual and group disadvantage. The data are drawn from Demographic and Health Surveys and Multiple Indicator Cluster Surveys covering eighty developing countries, including thirty-eight low-income countries. Data from these sources have been reconstituted to concentrate on key dimensions of education marginalization. The analysis presented in this chapter focuses on three core areas:

- **The bottom line: education poverty.** The marginalized typically fall below a social minimum threshold for years of education. To measure absolute deprivation, this analysis takes four years as the minimum required to gain the most basic literacy and numeracy skills. People aged 17 to 22 who have fewer than four years of education can be thought of as being in ‘education poverty’. People with fewer than two years can be thought of as living in ‘extreme education poverty’.

- **The bottom 20%.** Time spent in education is one indicator for the distribution of opportunity. Using the DME data set, relative marginalization is measured by organizing individuals aged 17 to 22 according to the number of years they have accumulated in education. The analysis then uses the results to identify the individual and group characteristics of the bottom 20% – the 20% with the fewest years of education.

- **The quality of education.** Acquiring the learning skills that people need to escape marginalization means more than just spending time at school. What children actually learn depends on a wide range of factors, including the quality of education and home circumstances. The analysis looks at marginalization in learning achievement using national and international evidence.

Patterns of marginalization reflect underlying inequalities in opportunity. One advantage of the DME data set is that it provides detailed information on individual and group characteristics of the marginalized, including wealth, gender, location, ethnicity and language. That information provides insight into the weight of ‘inherited circumstances’. These represent conditions over which people have little control but which play an important role in shaping their opportunities for education and wider life chances (Bourguignon et al., 2007; Ferreira and Gignoux, 2008; World Bank, 2005f).

Measuring marginalization is not a narrowly defined technical matter. It is an integral part of the development of strategies for inclusive education. The DME data set helps increase the visibility of the marginalized and provides a resource that can help inform policy design and public debate. Summary tables are presented at the end of this section and the full data set is available in electronic form.

### The scale of marginalization

**Falling below the minimum threshold – education poverty**

Time spent in education is one of the most important determinants of life chances in all societies. There is no internationally agreed benchmark for education deprivation analogous to the US$2.00 and US$1.25 a day international poverty thresholds. However, people with fewer than four years of schooling are unlikely to have mastered basic literacy or numeracy skills, let alone built a foundation for lifelong learning. Those with fewer than two years are likely to face extreme disadvantages in many areas of their lives. Of course, learning achievement ultimately depends as much on the quality of education as on time spent in school. But the four year and two year thresholds are bottom lines that this analysis treats as indicators for ‘education poverty’ and ‘extreme education poverty’, respectively.

Figure 3.1 uses these thresholds to provide a snapshot of education deprivation for sixty-three mostly low-income countries. It covers a reference group of young adults aged 17 to 22. Even taking into account over-age attendance, this is far enough beyond the standard primary school completion age to provide a credible picture of who has completed four years of education.

Three broad themes emerge. The first is the scale of global deprivation and inequality. In rich countries, the vast majority of young adults in this age range will have accumulated ten to fifteen years of education. In twenty-two of the countries covered by the DME data, 30% or more of 17- to 22-year-olds have fewer than four years of education; in eleven of these countries, the figure rises to 50%. Nineteen of the twenty-two countries are in sub-Saharan Africa, with Guatemala, Pakistan and Morocco making up the remainder.

The second theme concerns cross-country differences. On average, as one would expect,
the share of the population with fewer than four years or fewer than two years of education falls as the national average for years of education rises. Countries averaging more than eight years of education typically have fewer than 10% falling below the four-year threshold. This broad association conceals as much as it reveals, however. For example, Egypt averages more years of education than Kenya but has a larger share of 17- to 22-year-olds with fewer than four years of education. Such comparisons point to deeply entrenched national inequalities that are obscured by national average figures.

Comparisons of the depth of education poverty point in the same direction. In countries with very low average years of education, the majority of people falling below the four-year threshold also have fewer than two years of education. However, Pakistan has a lower share of the population with fewer than four years than Rwanda, but a 50% higher share with fewer than two years. These comparisons illustrate the variation in the degree to which all sections of society share in average progress in education.

The third theme to emerge from Figure 3.1 is the scale of national disparities based on income and gender. Wealth-based inequalities are a universal source of disadvantage in education. Being born into the poorest 20% significantly raises the risk of falling below the four-year threshold. In almost half of the countries including Cambodia, Ghana, Guatemala, India, Nicaragua, Nigeria and Yemen, the incidence of four-year education deprivation among the poor is double the national average. In the Philippines, being poor increases the likelihood of a 17- to 22-year-old having fewer than four years in education by a factor of four compared with the national average.
Gender effects magnify poverty effects – and vice versa. Being poor and female carries a double disadvantage in many countries. Figure 3.1 highlights the distance that separates girls in the poorest households, not just from the national average but also from boys in poor households. Gender disparities play an important role in explaining the relatively high level of education poverty in Egypt. Young women in the country are twice as likely as young men to have fewer than four years of education – and four times as likely if they are poor women. The incidence of deprivation among poor women in Egypt is higher than in some other countries, such as Honduras, Uganda and Zambia, at far lower levels of average income. Young women from the poorest households in Morocco are more likely to have fewer than four years in education than their counterparts in Senegal. In Yemen, 90% of poor young women aged 17 to 22 years have fewer than four years in education compared with 30% for poor males.

While data on those aged 17 to 22 provide insight into the legacy of deprivation, current attendance patterns reflect the degree to which disadvantage is transmitted across generations. Figure 3.2 shows income and gender disparities in sub-Saharan Africa, and South and West Asia are narrowing over time but remain very large. The household survey evidence in the DME data set indicates that 38% of children aged 7 to 16 from the poorest households in sub-Saharan Africa and 26% in South and West Asia have never been to school. It also provides worrying evidence of the limited progress achieved in reaching sub-Saharan Africa’s poorest 20% of children, especially young girls. The share of young adults aged 17 to 22 from the poorest households who never attended school was higher in South and West Asia than in sub-Saharan Africa. That picture is dramatically reversed for children aged 7-16 years, suggesting that social convergence in school attendance is moving more slowly in sub-Saharan Africa.
Inequalities stemming from income and gender help explain the inconsistent relationship between national wealth and acute deprivation in education. Wealth increases the resources available to households and governments for investment in education. Yet the high levels of variation point to the importance of other factors in expanding opportunity for the disadvantaged – notably, the effectiveness of public policies.

Income and gender disparities do not operate in isolation. Education inequalities in both dimensions intersect with inequalities linked to location, ethnicity, language, disability and other factors to limit opportunity and reinforce marginalization.

In many countries, rural households in general and poor rural households in particular lag far behind their urban counterparts. Rural location compounds wealth and gender disadvantages, reflecting the impact of cultural attitudes and the unequal burden of household labour. It also intersects with the wider patterns of group-based deprivation captured in Figure 3.4:

- In Egypt, income differences overlap with rural-urban and gender divides. Rich urban boys and girls both average just over ten years in education. Poor rural males average fewer than eight years, declining to under five years for girls. The rural part of Upper Egypt is an area of particularly deep disadvantage. Over 40% of the population lives in poverty and rural females in the region average just over four years of schooling – a level similar to the national average in Côte d’Ivoire.

- India’s wealth divides in education are among the largest in the world – and they are reinforced by regional and gender disparities. While the richest 20% average over eleven years in school, the poorest have an average education expectancy that places them just above the four year ‘education poverty line’. Poor rural females are well below that line. Averaging three years in education, they are in a position comparable to the national average for Chad. The average poor rural woman aged 17 to 22 in Bihar averages fewer than two years in education.

- In Nigeria, the average poor rural female is just above the two-year threshold for extreme education deprivation, with less than 40% the national average for years of school and around one-quarter the average for rich urban males. There is a three-year gap between poor rural
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females and poor urban males. Poor rural Hausa women are identifiably at the bottom end of the national distribution for opportunities in education, averaging just a few months of schooling. At the other end of the scale, rich boys and girls average around 10 years in education. The Nigerian case powerfully illustrates the mutually reinforcing effects of poverty, rural location and cultural factors in creating extreme disadvantage.

Inequalities associated with specific livelihoods often contribute to national disparities. The experience of pastoralists is a particularly stark example. Living in remote areas, with children heavily involved in tending cattle and livelihoods that involve movement across large distances, pastoralists face major barriers to educational opportunity. Those barriers of time and distance are sometimes reinforced by problems in education policy, including failure to offer relevant curricula, provide appropriate textbooks and respond to the realities of pastoral livelihoods.

And they interact with labour practices, cultural traditions and belief systems to perpetuate deep disparities based on gender.

National household survey and census data provide insight into the scale of this disadvantage. In Ethiopia, Kenya and Uganda, for example, pastoralist groups are at the bottom end of the distribution for educational opportunity (Figure 3.5). In Uganda, 85% of Karamojong pastoralists aged 17 to 22 have fewer than two years in school, compared with a national average of over six years. In West Africa, the Peul group, also called the Fula, Fulani and Poular, is among the most educationally disadvantaged in countries including Benin, Chad, Mali and Senegal.

Current school attendance patterns point to a continuation of extreme educational disadvantage across generations, with pastoralist children particularly unlikely to be attending school, as Figure 3.5 shows. In Benin, nearly 90% of Peul children of primary school age do not attend

Figure 3.3: Education poverty falls with rising income — but the association varies

Sources: UNESCO-DME (2009); annex, Statistical Table 1.

In Ethiopia, Kenya and Uganda, pastoralist groups are at the bottom end of the distribution for educational opportunity.
Figure 3.4: The education inequality tree
Average number of years of education of the population aged 17 to 22 by wealth, gender, location, and other selected drivers of marginalization, latest available year


Figure 3.5: Pastoralists face extreme education deprivation
% of the population aged 17 to 22 with fewer than two years of education and % of primary school age children not attending primary school, by gender and membership of selected pastoralist groups, latest available year

Notes: Gender-disaggregated data are not available for Uganda. % out of primary school: proportion of children of primary school age not attending primary school. Sources: UNESCO-DME (2009); census, calculations by Harttgen and Klasen (2009).
minority populations and conflict. In Chad’s eastern Barh Azoum district, fighting between government and rebel forces has led to large-scale internal displacement. The area is also home to a large population of refugees from the Sudan displaced by Janjaweed militias (Internal Displacement Monitoring Centre, 2009). Over 90% of the district’s population aged 17 to 22 has fewer than four years of education and school attendance rates are among the country’s lowest. In Uganda, strong national progress towards universal primary education has obscured large pockets of regional marginalization. Education data starkly reveal the devastating impact of conflict and poverty in the north of the country. In the north-eastern districts of Kotido, Moroto and Nakapiripirit, where security concerns and violence linked to cattle raiding have contributed to wider factors holding back progress in education, around 90% of those aged 17 to 22 have fewer than two years of schooling (Box 3.1).

Geographic inequalities are often closely linked to social and economic inequalities, rural-urban differences, ethnicity and language. In Cambodia’s most disadvantaged provinces, Mondol Kiri and Rattanak Kiri, large concentrations of hill tribes live in remote areas with high levels of poverty. Fewer than one in three residents aged 17 to 22 have more than four years of education (Figure 3.6). Gender disparities in the area are marked: young women average just 1.8 years of school, compared with 3.2 years for young men. These outcomes reflect the combined effects of poverty, isolation, discrimination and cultural practices, as well as policy failures in education.

In the Philippines, there is a close fit between the regional incidence of poverty and the regional incidence of young adults aged 17 to 22 with fewer than four years of education. One of the most educationally disadvantaged areas is the Autonomous Region in Muslim Mindanao, where years of conflict have exacerbated poverty and displaced 750,000 people (Box 3.2).

Another example comes from Mexico, where rapid progress has been made over the past decade, with social protection programmes and targeted transfers eroding regional and income-based inequalities. While regional disparities have fallen over time, they nevertheless remain (Table 3.2):

- The southern ‘poverty belt states’ of Chiapas, Guerrero, Michoacán, Oaxaca and Veracruz
figure prominently at the bottom end of the educational opportunity scale. Average years of education range from 5.7 for females in Chiapas to over 10 in the Federal District. Whereas 11% of those aged 17 to 22 have fewer than four years of education, for Guerrero the figure rises to 19% and for Chiapas 26%.

Indigenous people and ethnic minorities face particularly severe disadvantages in education. Some disadvantages faced by indigenous groups and ethnic minorities are poverty-related. Viet Nam’s more than fifty ethnic minority groups account for 13% of the population but 40% of people living below the poverty line (Truong Huyen, 2009). In Bolivia and Guatemala, almost three-quarters of indigenous people are poor, compared with half of the non-indigenous population (Hall and Patrinos, 2006). Higher levels of poverty are associated in turn with discrimination and cultural stigmatization, creating obstacles to education. In Bolivia, Aymara speakers aged 17 to 22 accumulate two years fewer in school than do Spanish speakers and for Quechua speakers the figure is four years. In Guatemala, average years in school range from 6.7 for Spanish speakers to 1.8 for Q’eqchi’ speakers.

Poverty and gender discrimination exacerbate education deprivation among indigenous minorities. From Guatemala and Peru to Cambodia and the Lao People’s Democratic Republic, indigenous young adults are far more likely than the non-indigenous to experience extreme education deprivation, especially if they are poor and female. An indigenous person aged 17 to 22 in Peru has two years less education than the national average; poor indigenous girls are two years further still down the scale (Figure 3.10).
Uganda has made rapid advances in primary education over the past decade. Numbers of out-of-school children have fallen sharply, completion rates are improving and gender disparities are shrinking. Sustaining progress towards universal primary completion will require a renewed effort to reach some of the most marginalized populations. Census and household survey data help identify these populations.

Poverty remains a major barrier. Over 20% of 17- to 22-year-olds in the poorest quintile of the population have fewer than two years of schooling – four times the level for the richest quintile. Increased investment in education and the abolition of school fees have improved access for the poor. Even so, 16% of those aged 7 to 16 from the poorest households are not attending school, pointing to a need for further measures.

Parts of Uganda have been left far behind. Conflict and the activities of the Lord’s Resistance Army in the northern districts of Acholi, Apac, Gulu, Kitgum and Lira have had devastating consequences for education. School closures, parental fears over abduction and chronic teacher shortages have held back progress. Insecurity has undermined livelihoods and reinforced poverty, making it difficult for parents to meet indirect education costs. Some 40% of Acholi parents cite cost as the reason for their children dropping out of school, although inability to meet costs and insecurity are mutually reinforcing.

Other northern districts with large pastoralist populations are among the most educationally marginalized in the country. In Kotido, 83% of 17- to 22-year-olds have fewer than two years of education – and only one-fifth of children are currently in primary school (Figure 3.7 and Table 3.1).

Gender disparities are another impediment to progress in the north. Traditional practices often lead to girls as young as 12 being married. Early pregnancy is another problem. One survey found that almost 10% of school dropout in the Acholi subregion was linked to pregnancy or early marriage. Fears over the safety of girls attending schools in conflict-affected areas added to these concerns. And where poverty forces households to choose who goes to school, cultural attitudes lead many to express a preference for boys’ education.

Conflict has made it more difficult to attract teachers to the north. For example, in late 2006, 500 teaching positions were advertised in Kitgum, but only 180 viable applications were received. High rates of teacher absenteeism reflect underlying problems. Many schools lack teacher housing, so teachers have to commute long distances, sometimes along insecure routes. Teacher income also tends to be far lower than in more prosperous areas, partly because poverty reduces the supplements households pay.

The fragile peace in the north gives the government and donors an opportunity to support an ‘education catch-up’. Seizing the opportunity may require a review of public financing. Mapping of educational disadvantage highlights the special needs of the north, but on a per capita basis the area receives roughly the same in government transfers as the rest of the country. There is a strong case for preferential financing for this disadvantaged area.


### Table 3.1: Primary net attendance rates in selected regions and districts of Uganda, by gender, 2002

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<thead>
<tr>
<th>Region</th>
<th>Male</th>
<th>Female</th>
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<tr>
<td>National</td>
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<td>83</td>
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<tr>
<td>Central region</td>
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<td>90</td>
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<tr>
<td>Northern region</td>
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<td>Adjumani</td>
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<td>Apac</td>
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<td>Gulu</td>
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<td>Kitgum</td>
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<td>Kotido</td>
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<tr>
<td>Yumbe</td>
<td>88</td>
<td>81</td>
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</table>

Source: Census, calculations by Hartgen and Klasen (2009).
Education indicators for the Philippines are below what might be expected for a country at its income level. There is a real danger that the country will fail to achieve universal primary education by 2015. Household survey data help identify the large pockets of extreme and persistent deprivation that are holding back progress.

The net enrolment ratio was 92% in 2007, which is comparable with countries at far lower levels of average income, such as Zambia, and below the levels attained by other countries in the region, such as Indonesia. Around 1 million children are out of school – a slight increase over the level in 1999.

Extreme poverty and regional disparities are at the heart of the mismatch between national wealth and education outcome. The gap separating the poorest 20% from the rest of society is far wider than in most countries in the region (Figure 3.8). Those aged 17 to 22 in the poorest quintile average about seven years of education – more than four years fewer than in the wealthiest 20%. Data on school attendance provide evidence that current policies are not reaching the poorest. Around 6% of 7- to 16-year-olds from the poorest households are reported as not attending school or to have ever attended. Extreme economic inequalities fuel education inequalities, notably by pushing many children out of school and into employment.

Regional data reveal deep fault lines in opportunity (Figure 3.9). Nationally, about 6% of those aged 17 to 22 have fewer than four years of education. In the best-performing regions – Ilocos and the National Capital Region – the share falls to 1% to 2%. At the other extreme, in the Autonomous Region in Muslim Mindanao and Zamboanga Peninsula over 10% fall below this threshold. The disparities are driven by a wide array of factors. The impact of high levels of poverty is exacerbated by conflict in Mindanao, and by the remoteness and wider disadvantage experienced by indigenous people in the Eastern Visayas and Zamboanga.

National authorities face difficult policy choices if the Philippines is to achieve universal primary education by 2015. Far more weight has to be attached to reaching marginalized populations and providing them with good quality education. Social protection and conditional cash transfer programmes, such as those in Brazil and Mexico, could play a vital role in combating child labour and extending educational opportunities to the poor. Another urgent priority is local language teaching in indigenous areas.

### Table 3.2: Selected education indicators, by region, Mexico, 2005

<table>
<thead>
<tr>
<th>Region</th>
<th>Male</th>
<th>Female</th>
<th>Years of education*</th>
<th>Fewer than 4 years of education (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Disadvantaged southern states</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chiapas</td>
<td>65</td>
<td>54</td>
<td>6.6</td>
<td>5.7</td>
</tr>
<tr>
<td>Guerrero</td>
<td>68</td>
<td>64</td>
<td>7.1</td>
<td>7.0</td>
</tr>
<tr>
<td>Michoacán</td>
<td>59</td>
<td>57</td>
<td>7.1</td>
<td>7.4</td>
</tr>
<tr>
<td>Oaxaca</td>
<td>69</td>
<td>61</td>
<td>7.1</td>
<td>6.7</td>
</tr>
<tr>
<td>Veracruz</td>
<td>68</td>
<td>65</td>
<td>7.3</td>
<td>7.1</td>
</tr>
<tr>
<td>National average</td>
<td>69</td>
<td>66</td>
<td>8.2</td>
<td>8.2</td>
</tr>
<tr>
<td><strong>Selected northern and central states</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Baja California</td>
<td>75</td>
<td>74</td>
<td>8.9</td>
<td>9.4</td>
</tr>
<tr>
<td>Distrito Federal</td>
<td>84</td>
<td>84</td>
<td>10.0</td>
<td>10.1</td>
</tr>
<tr>
<td>México</td>
<td>74</td>
<td>72</td>
<td>9.0</td>
<td>9.0</td>
</tr>
</tbody>
</table>

* Data for population aged 17 to 22.

The diversity of the challenges sets limits to what the central government can do. Regional and subregional authorities need to develop and implement policies that respond to local needs. However, the central government could do more to create an enabling environment. The education system suffers from chronic shortages of teachers and classrooms, rising class sizes and low levels of learning achievement. Addressing these problems will require an increase in the 2.1% share of national income directed towards education in 2005 – one of the lowest levels in the world.

School attendance patterns revealed in household surveys point to the prospect of marked disparities being transmitted across generations.

Disadvantages associated with language are found across all regions. Having the official language of instruction as a home language significantly lowers the risk of having fewer than four years of education at age 17 to 22. Having Kurdish as a home language in Turkey carries a 30% risk of having fewer than four years of schooling compared with less than 5% for Turkish speakers. While these language effects are strongly associated with regional poverty differences, they are also important in their own right (Figure 3.11).

In countries where the official language is not the most common language spoken at home there are strong links from language to marginalization in education. There are some thirty countries of

---

**Figure 3.9: Children in poor, remote, or conflict-affected regions of the Philippines suffer higher levels of education poverty**

% of the population aged 17 to 22 with fewer than four years of education and prevalence of poor families by region, Philippines, 2003

*Notes: Education poverty is measured as the proportion of 17- to 22-year-olds with fewer than four years of education. Income poverty rate is the proportion of families whose income puts them below the poverty line for each region. Sources: UNESCO-DME (2009); Philippines National Statistical Coordination Board (2006).*

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**Figure 3.10: Wealth and gender widen indigenous education disparities in Latin America**

Average number of years of education for indigenous people aged 17 to 22, selected countries, latest available year

*Notes: The indigenous average is the weighted average for the indigenous groups for which data were available. These were: Bolivia (Aymara, Guarani and Quechua ethnicity), Guatemala (Chorti, Kanjobal, Kaqchiquel, K’iche’, Mam, Poqomchi’, Q’eqchi’ and Tz’utujil language), Peru (Aymara and Quechua ethnicity). For Colombia, the ‘indigenous ethnicity’ census category was used. Sources: UNESCO-DME (2009); census, calculations by Harttgen and Klasen (2009).*
sub-Saharan Africa where the official language is not the most common home language (Alidou et al., 2006). This means that in many cases children are taught at primary school in a language other than their mother tongue, which contributes to extreme language-based disparities. In Mozambique, speakers of Jaua aged 17 to 22 average one year in education compared with five years for speakers of Portuguese; over 80% have fewer than four years in education. In Nigeria, education poverty levels, defined by the four-year threshold, range from less than 10% for Yoruba speakers to over 60% for Hausa speakers. Across the region, home language has a strong bearing on prospects for getting more than four years of education.

The interaction between language, ethnicity and location is a potent source of marginalization in education. Household survey data can help identify the regions and individuals most severely affected. One striking illustration comes from Turkey. In most regions, 2% to 7% of those aged 17 to 22 have fewer than four years of education, but in the eastern region the figure rises to 21%. Young women speaking a non-Turkish home language – predominantly Kurdish – are among the most educationally marginalized. They average just three years of education – less than the national average for Senegal (Figure 3.12).

The ‘bottom 20%’: relative deprivation
Marginalization is not just about deprivation in absolute terms. It is also about falling behind the rest of society. The individual and group-based disadvantages discussed above figure prominently in explaining the profile of those left behind in education. This section looks at the characteristics of the ‘bottom 20%’ in education.
Who are the bottom 20%? Household survey data make it possible to group people aged 17 to 22 on the basis of accumulated years of school. Data analysis can also be used to decompose group membership by identifying social characteristics such as household wealth, gender, ethnicity and location. Unlike the thresholds of deprivation used in the previous section, the ‘bottom 20%’ provides a relative national scale. People at the lowest end of the distribution in, say, the Philippines or Turkey have more years of school than their counterparts in Chad or Mali. What they share is the experience in childhood of restricted opportunity relative to other members in their country.

Household surveys have been widely used to chart overall inequality in education. The new data analysis prepared for this Report makes it possible to look beyond overall inequality to the characteristics of the ‘bottom 20%’. The data can be used to assess both the weight of discrete variables such as income, language and gender and – with limitations – the cumulative effects of these variables.

Household wealth. Being born into the poorest 20% of households in a country is strongly associated with heightened risk of being at the bottom end of the distribution for educational opportunity (Figure 3.13). In Colombia, Mongolia, Nicaragua, the Philippines and Viet Nam, the poorest 20% account for twice their population share in the bottom 20% of the education distribution.

Ethnicity and language. In some countries, ethnic and language minority groups account for a large share of the bottom 20% (Figure 3.14). In Nigeria, over half the ‘education poor’ are Hausa speakers – a group that makes up one-fifth of the population. Reflecting the legacy of disadvantage experienced by indigenous Q’eqchi’ speakers in Guatemala, membership of this language group more than doubles the risk of being in the bottom 20% for years in school.

Region and location. Regional differences in years spent in education are often far larger than differences between countries (Figure 3.15). Areas such as northern Kenya, eastern Turkey, rural Upper Egypt and northernmost Cameroon are heavily overrepresented in the lowest 20% of the education distribution for their countries. Single region figures can understate the level of disadvantage. In Cameroon, three regions with just one-quarter of the overall population account...
The disadvantages that drive people into the bottom 20% in education do not operate in isolation. They intersect and magnify the wider social inequalities that restrict opportunities in education. This is illustrated in Figure 3.16, which uses DME statistics to look at the impact of two or three overlapping dimensions of deprivation. The impact of clustered disadvantage is evident from the combined effects of poverty, gender and other markers for disadvantage. These effects can be captured by reference to the ‘extreme education poverty’ benchmark of fewer than two years in education and the more recent disadvantages reflected in the school attendance rates for primary school age children:

- Being a rural girl in the Cambodian hill provinces of Mondol Kiri and Rattanak Kiri increases the risk of not being in school by a factor of five. Three-quarters of the group have fewer than two years in school, compared with a national average of 12%.

- In Guatemala, girls from poor households of Indian ethnicity have primary net attendance rates of 60% compared with a national average of 82% and they are over three times more likely to have fewer than two years in school.

- In Turkey, one of the most marginalized groups is Kurdish-speaking girls from the poorest households. Around 43% at ages 17 to 22 have fewer than two years of education, while the national average is 6%.

- In Nigeria, poor Hausa girls face some of the world’s most severe education deprivation. Some 97% of 17- to 22-year-olds have fewer than two years of education and just 12% of primary school age Hausa girls attend primary school.

Each of these examples involves a relatively large population group. They represent a statistically significant national policy challenge. But combating marginalization is also about identifying small groups facing intensive deprivation. Figure 3.17 uses the DME data set to illustrate the high levels of marginalization experienced by a number of small population groups. To take one case in point, almost 90% of the Mushahar community in Nepal, a largely landless low-caste group, is in the bottom 20%. The average time spent in school for those aged 17 to 22 in this group is less than three months, and only 29% of girls and 41% of boys attend primary school. Similarly, in Viet Nam...
REACHING THE MARGINALIZED

Measuring marginalization in education

Figure 3.16: Overlapping disadvantages erode education opportunities

Primary net attendance rates and % of the population aged 17 to 22 with fewer than two years of education, selected countries, latest available year


Figure 3.17: Small groups, big disadvantages

Average number of years of education for selected marginalized groups, population aged 17 to 22 selected countries, latest available year


In Nigeria, 97% of poor Hausa girls have fewer than two years of education.
nine out of ten Hmong, members of an ethnic minority group living in northern highland regions, are in the bottom 20% of the national distribution for years in school.

**The quality deficit**

Marginalized individuals and groups do not just accumulate fewer years of education. When they are in school they often receive a poor-quality education, leading in turn to low levels of learning achievement.

Many of the world’s poorest countries have been more successful in expanding access than raising quality. As Chapter 2 shows, average learning achievement is often shockingly low even for children who complete a full primary education cycle. The achievement deficit is widely spread across the population, but is typically concentrated among individuals and groups facing wider disadvantages in access to education.

Factors such as household wealth, parental education and home language exercise a pervasive influence on learning achievement. That influence has been extensively documented in developed countries but less widely explored in the world’s poorest countries. Research carried out for this Report examined data on learning achievement collected for sub-Saharan Africa, through the PASEC and SACMEQ regional assessment programmes, to identify characteristics associated with students performing at the top, middle and bottom of the test score range. The results are striking. As early as grades 5 and 6, there is a strong association in many countries between wealth and test scores. In Kenya and Zambia, the average household of children scoring in the top 10% has twice as many consumer durables as the average household for children in the lowest 10%. Parental literacy is also strongly associated with test scores (Fehrler and Michaelowa, 2009).

In Latin America, too, assessments reveal the low achievement of students belonging to marginalized populations. The PISA assessment programme uses a composite set of indicators to construct a socio-economic background index for parents of 15-year-olds tested. The results point to a strong association between parental socio-economic status and learning outcomes. In Brazil, Mexico and Uruguay, children of parents in the top quartile achieved a mathematics score 25% to 30% higher than those in the poorest quartile (Vegas and Petrow, 2008). In a national assessment in Uruguay, only 36% of sixth-graders from ‘very unfavourable’ backgrounds passed the mathematics test and 55% the language test, as opposed to 72% and 87%, respectively, of those from ‘favourable’ backgrounds (Vegas and Petrow, 2008).

Education outcomes are often substantially worse for indigenous people and ethnic minorities. In Latin America, there is extensive evidence of test score gaps between indigenous and non-indigenous children. In Guatemala, indigenous children in both rural and urban areas scored between 0.8 and 1 standard deviation below non-indigenous children in grades 3 and 6 Spanish tests – a gap of around 17% (McEwan and Trowbridge, 2007). Differences in mathematics tests were smaller but still significant. Recent research from Peru recorded exceptionally large gaps in indigenous and non-indigenous learning achievement (Cueto et al., 2009). At the end of primary school, the gap in mathematics and language scores was above a full standard deviation (1.22 and 1.07, respectively).

Home language often has an important influence on test scores. Research using data from the 2007 TIMSS assessment identifies a strong association between students performing below the lowest international benchmark and the frequency with which the language of the test is spoken at home. In Turkey, grade 8 students who report ‘always or almost always’ speaking the test language at home are 30% less likely to score below the international mathematics benchmark than those who report speaking it ‘sometimes or never’ (Altinok, 2009). Evidence from PASEC and SACMEQ also points to a strong link between home language and the language of instruction in influencing test scores (Fehrler and Michaelowa, 2009).

Language, ethnicity and regional factors can combine to produce complex patterns of disadvantage. In Viet Nam, a large-scale survey of grade 5 students in 2001 found strong disparities in achievement among provinces, with school location and students’ socio-economic background and ethnicity also having a strong influence (World Bank, 2004). Ethnic minority students who spoke no Vietnamese at home were much less likely to read ‘independently’ than students whose home language was Vietnamese.

**Marginalization in rich countries**

Education is an increasingly important engine of social and economic success in rich countries. While education can break the transmission of cycles of disadvantage across generations, it can
also reinforce them. Many of those with the lowest education levels come from families characterized by social disadvantage.

Getting a good education can create a virtuous circle of life chances. There is extensive evidence that education improves prospects not just for earnings and employment but also for health, civic engagement and social mobility (Lochner, 2004; Machin et al., 2006). Conversely, low levels of education are associated with entrenched employment disadvantage, restricted social mobility and a wide range of social problems. When individuals and groups emerge from education systems with low levels of achievement, they and their children face a heightened risk of marginalization in many aspects of their lives. Education systems provide a mechanism for offsetting social disadvantage, but when opportunities and outcomes are skewed they can reinforce social divisions.

There are obvious differences in the experience of education marginalization in rich and poor countries. One is in the degree of absolute deprivation. Almost nobody in the rich world enters adulthood with fewer than four years of education, let alone fewer than two years. Relative deprivation is another matter. Many education systems in rich countries have entrenched patterns of marginalization linked to poverty, the social and economic status of parents, ethnicity, race and other factors.

Marginalization in education in France, Germany, the United Kingdom or the United States is clearly not the same as in Cambodia or Mali. Yet there are two parallels. First, the playing field for opportunity is highly uneven: some groups and individuals enter education systems facing a heightened risk of failure. Second, education systems themselves often reinforce and perpetuate wider social disadvantages.

Dropping out of school
Leaving school too early is strongly linked with marginalization. Young people with only a lower secondary education have limited opportunities to realize their potential and develop their learning skills. They face disadvantages in employment and are at greater risk of poverty and social exclusion.

School dropouts represent a significant education underclass in many countries. In the European Union, 15% of people aged 18 to 24 in 2006 left school with only lower secondary education and were not in further education or training. The share affected ranged from just over 10% in some countries, including France and the United Kingdom, to 20% in Italy and 30% in Spain. Cross-country research has identified parental wealth, child poverty, ethnicity and gender as major factors influencing dropout rates (European Commission, 2008).

Evidence from the United States illustrates the pattern of risk factors associated with being out of school. In 2006, about 8% of people aged 16 to 19 were neither enrolled in school nor working. Family poverty contributed strongly to being out of school. Some 17% of youth from poor households were out of school, compared with 5% from non-poor households. Race and ethnicity were also important, with 11% of African-American and Hispanic youth reported as out of school – double the share for white and Asian youth (US Department of Education, 2007).

These data reflect underlying social disadvantages linked to school dropout. One high-profile national report documented a secondary school dropout epidemic in the United States (Bridgeland et al., 2006), with around 1 million school leavers each year lacking a diploma. The epidemic is unequally spread. African-American and Hispanic youth are highly disadvantaged. Whereas the graduation rate for white students is 84%, it falls to 72% for Hispanic and 65% for African-American students (Heckman and LaFontaine, 2007). Parental poverty and low levels of education are other major risk factors. Among student characteristics, low test scores and pregnancy contribute strongly to dropout rates. While the factors behind dropout are varied and complex, the consequences are uniformly severe. Students who drop out typically earn 30% to 35% less than students with a secondary school diploma (Tyler and Lofstrom, 2009).

Learning achievement
In a country with equal opportunities for learning, it would be impossible to predict education outcomes on the basis of individual or group characteristics. No country has achieved this state, but countries differ markedly in the degree to which social circumstances shape education opportunity and in the degree to which education systems counteract marginalization.

Students from more advantaged socio-economic backgrounds generally perform better in tests of
Learning achievement. Analysis of national data from the 2006 PISA science tests given to 15-year-olds shows that, on average, socio-economic background explains 14% of the variation in performance. There is marked variation around the average. Socio-economic characteristics weigh far more heavily in some countries, such as France, Germany, the United Kingdom and the United States, than in others, including Finland, Japan and the Republic of Korea, all of which achieve higher average scores (OECD, 2007b).

Figure 3.18 illustrates the weight of inherited circumstance in shaping learning achievement. It suggests that high levels of inequality are particularly damaging for children from households at the lower end of the socio-economic distribution. Consider the following comparisons. The share of the national variation in PISA mathematics scores explained by socio-economic status is far greater in Germany than in Finland, with German children in the lowest socio-economic group twice as likely to score at the lowest level in mathematics tests. The contrast between (less equal) France and (more equal) the Republic of Korea is equally striking. Does the higher level of equity achieved in Finland and the Republic of Korea come at the price of lower average performance? On the contrary, both countries have higher mean test scores in PISA than France or Germany.

Household poverty, a core element in socio-economic disadvantage, is strongly associated with low levels of education achievement. In England, students receiving a free school meal – a sign of household deprivation – have far lower average test scores than other students. The score gap in English is 16% and the gap in mathematics is 29%. The share of this group leaving school with high scores on national tests is one-third the national average (Vignoles, 2009; UK Department for Children, Schools and Families, 2008).

Wealth-based performance differences in France are equally marked. Almost half the children from the poorest households are significantly behind their peers by sixth grade. By age 15, around 15% of the poorest students are at least two years behind the ninth grade performance level – three times the national average. By age 17, almost one in five poor youth have given up their studies (France Council for Employment, 2008).

Poverty effects combine with other factors that contribute to marginalization. In the United States, schools with high concentrations of poverty (with over 75% of students eligible for free or subsidized lunch) had the lowest percentage of white students, the highest percentage of African-American and Hispanic students, and the highest percentage of students who reported always speaking a language other than English at home. They also had the highest percentage of fourth-graders being taught by a teacher with fewer than five years of experience (US Department of Education, 2007). Test score gaps reflect the cumulative disadvantage. On the international TIMSS scale for mathematics in grade 8, the United States ranks ninth out of forty-eight countries. Hispanic students, however, score just above the level of Malaysia. On an international scale, schools with high concentrations of poverty and African-American students score between the average levels of Malaysia and Thailand (Figure 3.19). These very large test score effects point to limited success by the education system in counteracting wide social disadvantages.

Figure 3.18: Socio-economic disadvantage in education weighs more heavily in some countries than others

Odds ratio for likelihood of lowest socio-economic status students aged 15 being among the bottom performers and % of mathematics score variance explained by socio-economic status, OECD countries

Note: The socio-economic disadvantage index is the relative likelihood of students with the lowest socio-economic status (SES) scoring below or at proficiency level 1 when compared to student with the highest SES.

Sources: OECD (2006a, 2007a).
Migrant students in many countries face a far higher risk of education marginalization than native students do. Their participation in school is more likely to be disrupted by leaving early – and migrant students often lag in learning achievement. Research based on evidence from PISA surveys shows that, in most OECD countries, first-generation immigrants typically lag an average of about 1.5 years behind their native counterparts (OECD, 2007b). In several countries, including Germany, the Netherlands and Switzerland, the proportion of immigrant students failing to reach level 2 in the 2006 PISA assessment was at least three times as high as the proportion of native students (Figure 3.20).

Countries vary also in the degree to which they are narrowing learning achievement gaps. While the gap is narrowing in Sweden and Switzerland, it is widening in Germany and the Netherlands (OECD, 2007a). Education policy is just part of the explanation for these trends. Patterns of migrant disadvantage are closely associated in many countries with home language, country of origin, neighbourhood effects and other kinds of social deprivation. But education systems can help narrow or widen the gap.

Early tracking of students into different ability streams and types of school has been found in several cross-country studies to be associated with greater inequality in achievement without any discernible benefits for average performance (Hanushek and Wößmann, 2006). Being labelled as ‘low ability’ at an early age may lead students to internalize low expectations and lose motivation. Differences in tracking policies may help explain why students of Turkish origin tend to perform better in Switzerland (where tracking is delayed) than in Germany (which tracks students early), two countries where many migrants are channelled into vocational streams (Nusche, 2009; OECD, 2006b). They also go some way towards explaining the very large variation in performance between schools in Germany linked to socio-economic status. In Finland, less than 5% of overall performance variation of students can be traced to inequalities between schools, compared with over 70% in Germany – twice the OECD average (OECD, 2006b).

Racial and ethnic minority groups experience some of the most severe education disadvantage, which can be traced to deeply engrained and often centuries-old patterns of cultural discrimination and stigmatization. Low educational achievement reflects the durability of these patterns, interacting with social and economic inequalities to perpetuate social exclusion.
One particularly stark example of marginalization is the experience of the Roma community. Assessing the full extent of the deprivation faced by Roma children in education is difficult, as data are often partial and unreliable (Box 3.3). The data that are available tell their own story. In most central and eastern European countries no more than 20% to 25% of Roma children attend secondary school and the vast majority of those are enrolled in vocational education. Many drop out of primary school. It is estimated that 15% to 20% of Roma children in Bulgaria and 30% in Romania do not continue beyond fourth grade. The problem is not restricted to central and eastern Europe. It is estimated that half of Italy’s Roma children are in primary school but fewer than 2% progress to upper secondary education. While data are scarce, education outcomes for Roma fall well below the levels for the majority population (Open Society Institute, 2007).

Roma education experiences underline the damage that can be inflicted by bad policies. In many countries, education policies and practices have the effect of creating segregation. Geographic concentration is one factor. In Bulgaria, an estimated 70% of Roma children study in schools where the share of the majority population is less than 50%. Moreover, Roma children are often more likely than their peers to be diagnosed as ‘special needs’ students and placed in separate schools (Open Society Institute, 2007). In Hungary, one report found that ‘about every fifth Roma child is declared to be mildly mentally disabled’ (Roma Education Fund, 2007, p. 32). Such practices reflect cultural attitudes and negative stereotyping. One Council of Europe report on Slovakia found that up to half of Roma children in special elementary schools were there as a result of erroneous assessment (European Commission against Racism and Intolerance, 2009).

The legacy of marginalization facing indigenous people in rich countries has received insufficient attention in international education debates. For Native Americans, the Aboriginals of Australia and the Māori of New Zealand, the imprint of discrimination, stigmatization and social breakdown is clearly visible in education data. Only 34% of indigenous Australians aged 15 to 24 are in education, compared with 55% of their non-indigenous peers. Indigenous people also score lower on reading and numeracy tests, especially if they live in remote areas (Figure 3.21). In very remote areas, the share of indigenous Australians falling below the national minimum benchmark for reading is more than double the level for all students. In New Zealand, there is

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**Box 3.3: Monitoring gaps and marginalization — Roma in Europe**

With an estimated population between 8 million and 12 million, Roma are one of Europe’s largest minorities. They are also among the most marginalized. Throughout Europe, Roma face institutionalized discrimination, limited opportunities for participation in many aspects of society and poor access to good-quality education.

Lack of data makes it difficult to measure the scale of Roma marginalization. It also limits public debate and the development of effective policy responses. Census data often undercount Roma because the social stigma attached to Roma identity leads many to misreport or refuse to report their identity. Administrative data are also frequently lacking. In some countries, such as Romania and Slovakia, this is because of privacy legislation that restricts reporting on ethnicity.

While data on Roma are scarce overall, the absence of reliable statistics on education is a particular weakness. Problems noted by the European Roma Rights Centre range from under-reported births to unreliable and inconsistent data on school enrolment, dropout and other indicators collected by school authorities. A qualitative study in Bulgaria found that administrative data failed to report a significant number of out-of-school Roma children because households were not registered or school databases were incomplete.

Pressure to improve the scope and reliability of monitoring data on Roma has been building. The Decade of Roma Inclusion 2005–2015, an initiative supported by the World Bank, the United Nations Development Programme, the European Commission, the Council of Europe and the Open Society Institute, has led to a range of initiatives aimed at challenging the use of human rights laws to prohibit data collection and at improving ethnic data disaggregation and clarifying ‘Roma identity’.

Sources: Open Society Institute (2007); European Roma Rights Centre (2007); European Commission (2009a).
encouraging evidence that Māori children – especially girls – are catching up with non-Māori. Even so, the achievement gaps remain large. Whereas 65% of all students leave school with the National Certificate of Educational Achievement (NCEA) level 2 qualification, the figure drops to 44% for Māori children. Māori learners are three times as likely as non-Māori to leave school with no qualification (New Zealand Ministry of Education, 2009).

Speaking a minority language is also often associated with low levels of education achievement. In many countries, large numbers of children are taught and take tests in languages that they do not speak at home, hindering the early acquisition of reading and writing skills. Their parents may lack literacy skills or familiarity with official languages used in school, so that the home environment reinforces learning opportunity gaps between minority and majority language groups.

International and national learning assessments confirm the importance of home language as a factor in test scores. The TIMSS 2007 assessment found that fourth- and eighth-grade students who reported ‘always speaking’ at home the language in which the test was conducted score significantly higher. For fourth-grade science students who reported only ‘sometimes speaking’ the test language at home, the test score was 10% lower. For students who reported ‘never speaking’ the test language at home, the score was 20% lower (Martin et al., 2008).

**Conclusion**

Making sure that everyone has a chance to develop their potential through education is an important challenge for all countries. Equal opportunity in education is a basic human right. Moreover, fair and inclusive education is one of the most powerful levers available for making societies more equitable, innovative and democratic. Overcoming the extreme and persistent disadvantages that marginalized groups experience is a vital element in the wider agenda for inclusive education. Extending opportunity to these groups requires more than the general expansion of education and the improvement of average learning achievement levels. It requires policies that target the underlying causes of disadvantage in education and beyond.
Table 3.3: Deprivation and Marginalization in Education, selected data, latest year available

<table>
<thead>
<tr>
<th>Country</th>
<th>Year of survey</th>
<th>Average number of years of education (Years)</th>
<th>‘Bottom 20%’ (Share of the poorest wealth quintile in the bottom 20% of the education distribution, by years in school)</th>
<th>Education poverty (Share of the population with fewer than four years of education)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albania</td>
<td>2005</td>
<td>9.9 9.9 9.9 11.5 8.7 2.7</td>
<td>32.5</td>
<td>Total 1.0 1.1 0.9 0.9 27.4 26.4 28.1 90.1</td>
</tr>
<tr>
<td>Armenia</td>
<td>2005</td>
<td>9.2 9.3 9.2 9.8 8.2 1.6</td>
<td>21.5</td>
<td>Female 0.9 1.4 0.6 2.3</td>
</tr>
<tr>
<td>Azerbaijan</td>
<td>2006</td>
<td>10.6 10.8 10.5 11.4 9.7 1.7</td>
<td>34.9</td>
<td>Rural girls from the poorest quintile 2.3 1.3 3.1 6.4</td>
</tr>
<tr>
<td>Bangladesh</td>
<td>2004</td>
<td>5.8 5.9 5.7 8.0 3.6 4.4</td>
<td>40.4</td>
<td>47.8 33.4 60.5 150.0</td>
</tr>
<tr>
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## REACHING THE MARGINALIZED

### Measuring marginalization in education

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Measuring marginalization in education

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CHAPTER 3

Getting left behind

Introduction

Children at risk of marginalization in education are found in all societies. At first glance, the lives of these children may appear poles apart. The daily experiences of slum dwellers in Kenya, ethnic minority children in Viet Nam, a blind girl from a low-income home in Pakistan and a Roma child in Hungary are very different. What they have in common are restricted opportunities to develop their potential, realize their hopes and build a better future through participation in education.

The first part of this chapter identified some of the most marginalized social groups. It documented mutually reinforcing disadvantages linked to poverty, gender and ethnicity. This part looks beyond the data to the processes and power relationships that diminish opportunity. It concentrates mainly on primary school age children in developing countries, while recognizing that early experience tips the balance against many children before they enter school and that educational marginalization continues into adulthood (see Chapter 2).

Unravelling the threads behind marginalization in education can be difficult. Many factors are involved. Poverty often makes education unaffordable and pushes children out of classrooms and into employment. Gender intersects with low income to create forces of marginalization that are less tangible and less easily measurable than poverty but no less damaging. The low value placed on girls’ education can make them the last into school and the first out when poverty strikes. Cultural attitudes and beliefs, stigmatization and discrimination also fuel marginalization, locking children into cycles of low expectation and underachievement. Moreover, many of the processes leading to marginalization in education can be traced to deeply entrenched power relationships that perpetuate poverty and gender disadvantages and group-based inequalities.

The interaction is two-way. Marginalization in education is in part a consequence of marginalization in other areas. But it is also a cause of marginalization. Education systems have the potential to mitigate social disadvantage, yet often they either fail to utilize that potential or they actually magnify underlying problems. As this part of the chapter documents, acts of commission and omission in education policy can place good-quality schooling far beyond the reach of the marginalized, reinforcing wider social divisions in the process.

The interaction between marginalization in education and wider forms of social exclusion does not follow general rules. The national and subnational context matters, as does the specific form of disadvantage that marginalized children experience. Even so, recurrent themes cut across different environments and experiences. This part of the chapter looks at these themes, identifying the global drivers that fuel the local patterns of marginalization explored in the previous part. The first section looks at poverty as a barrier that perpetuates disadvantages in education, partly by pushing children into work. The second examines issues behind group-based marginalization, tracing the routes through which ethnicity, language, stigmatization and poverty often interact to create vicious circles of low expectation and low achievement. The third section considers location-specific factors that intersect with livelihoods, highlighting problems faced by slum dwellers, remote rural communities and conflict-affected regions. The fourth examines disability and the fifth HIV and AIDS – issues that have a marked impact on education.

Poverty and child labour

Household poverty is one of the strongest and most persistent factors contributing to marginalization in education. The transmission mechanisms are well known. Poor households have fewer resources to invest in their children’s schooling, health and other assets. Poverty is also a source of vulnerability. When poor people are hit by economic shocks, droughts or health problems, they often lack the resources to cope without cutting spending in key areas, including children’s schooling. Education can act as a powerful catalyst in breaking cycles of poverty. But poverty itself is a strong constraint on opportunities for education, fuelling the transmission of disadvantage across generations.

Global poverty trends: a mixed record

The sheer scale of global poverty makes it a formidable barrier to Education for All. In 2005, nearly 1.4 billion people were living on less than US$1.25 a day. More than half the population of sub-Saharan Africa and 40% of people in South Asia fell below this absolute poverty threshold.
Many millions more were living just above the threshold, surviving on less than US$2 a day, rendering them highly vulnerable to acute poverty (Figure 3.22).

Global aggregate figures can obscure the depth of poverty. The average daily consumption level of a poor person in sub-Saharan Africa is just US$0.73—a figure unchanged in twenty-five years (Chen and Ravallion, 2008). The incidence and depth of poverty are more marked in sub-Saharan Africa than any other region. Depth of poverty matters because it has a bearing on capacity for coping with shocks. For people surviving on US$0.73 a day, even small losses can have catastrophic consequences for nutrition, health and schooling.

The good news is that the number of people worldwide living in extreme poverty has been falling. The decline is driven by strong performance in East Asia; progress in most other regions—notably sub-Saharan Africa—has been far less encouraging. The bad news is that a combination of rising food prices and the global financial crisis has slowed the pace of poverty reduction. For 2009, there may be 55 million to 100 million more people living below the international poverty line than was expected before the crisis. On current economic growth projections, the number of people living in extreme poverty could rise in more than half of all developing countries in 2009 (World Bank, 2009k).

Poverty trends in developed countries are also a source of concern. Evidence from the OECD suggests that children are disproportionately disadvantaged by household poverty, with an average of 12% affected. Just as disturbing as this number is the underlying trend. During a decade of sustained economic growth up to the mid-2000s, child poverty rates grew as income inequality rose. Rising unemployment caused by the financial crisis is likely to lead to sharp increases in child poverty in 2009 and 2010 (see Chapter 1). The danger is that rising child poverty will in turn fuel inequalities in education.

**Poverty’s effects are transmitted to education**

Education can help lift people out of poverty by boosting productivity and opening doors to jobs and credit. Conversely, lower educational attainment is strongly associated with higher poverty levels. The evidence thus points to a negative cycle in which poverty begets education disadvantage, which in turn perpetuates poverty. What drives this cycle?

The inability of poor households to support investment in education is one significant factor. In many countries, parents have to pay a high proportion of their income to put their children in school. The costs include official school fees, informal and unofficial charges levied to support teachers’ pay and other expenses, and payments for uniforms and textbooks.

For the poorest households, schooling competes with other basic needs, such as health care and food. A study covering four slums in Bangladesh illustrates the extent of the financial burden. For the average household in these slums, expenditure on education amounted to 10% of their income per child in school, rising to 20% for the poorest one-fifth of households. Monthly expenditure per child by the poorest households averaged around US$2 out of an income of less than US$12 per month. Overall, the largest single cost was for supplementary tuition, which many families deem necessary for progress through school (Cameron, 2008).

Eliminating official school fees can help lower financial barriers for the poorest households. From 1999 to 2007, fourteen countries, most of them in sub-Saharan Africa, reported abolishing tuition fees.

For poor people in sub-Saharan Africa, even small losses can have catastrophic consequences for nutrition, health and schooling.

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4. The OECD defines poverty as living in a household with an equivalized household disposable income of less than half the median for the whole population (OECD, 2009g).
This was followed by sharp increases in enrolment in many countries, including Kenya, Uganda and the United Republic of Tanzania (UNESCO, 2007). A study in Burundi in 2004, just after fees were abolished, showed that over 40% of the poorest households reported some of their children would not be in school had fees not been removed. This is consistent with research indicating that, before fees were abolished, a third of children from the poorest households were not in school because their parents could not meet costs (World Bank and Burundi Government, 2008).

Poor people often report inability to afford education for their children, even in countries with nominally free primary schooling. In Cambodia, cost is among the most commonly cited reasons for children being out of school, even though there are no official charges (World Bank, 2006a). In Malawi and Uganda, where fees were abolished over a decade ago, many more children from poor households have entered school. Yet in both countries, half the households with children who have dropped out cite lack of money as the main problem (World Bank, 2006h, 2007c). In a survey covering fifty slums in Delhi, financial constraints were given as the main reason for school age children being out of school or dropping out, even though education is nominally free (Tsujita, 2009).

Why has fee abolition failed to eliminate cost barriers? In some cases because legislation eliminating fees has been only partly implemented. In the Lao People’s Democratic Republic, tuition fees are officially proscribed but about half the schools still levy them (World Bank, 2006c). Indonesia’s free basic education policy, introduced in 2005, provides incentives for schools to eliminate fees but allows them to opt out (World Bank, 2006b). Another problem is that formal fees are just one part of the cost of education. In many cases, parents must also buy uniforms and textbooks. In Sierra Leone, uniforms double the cost associated with school fees (World Bank, 2007b). Poor parents in Nigeria no longer face tuition charges, but books and uniforms cost more than fees once did (Lincove, 2009).5

Lowering costs is not a stand-alone strategy. Poor parents – like all parents – also consider the quality of the education available. In some countries, the elimination of official fees has led to deterioration in quality, with surges in enrolment increasing class sizes and straining the school infrastructure. To avoid such problems, governments need to assume responsibility for maintaining education resources by raising public spending and sequencing reforms to increase the supply of teachers, classrooms and learning materials (World Bank and UNICEF, 2009).

Social attitudes strongly condition the effects of poverty. The degree to which parents value children’s education inevitably influences prospects of participation in school. For Hausa girls in northern Nigeria, the low value many adults ascribe to their education is a powerful source of exclusion (Box 3.4).

Economic shocks can undermine education

While poverty is widely recognized as a barrier to educational opportunity, less attention has been paid to vulnerability. One characteristic of being poor is that precarious livelihoods carry a heightened risk of insecurity. The poorest households often find it impossible to shield their children’s schooling from external shocks such as droughts, floods or economic downturns. They often live in hostile environments and have little access to assets such as land, livestock, credit or savings to see them through difficult times. In urban areas, the very poor often work in informal sectors with low wages and limited security.

Cross-country research on past economic crises and climate events shows that the effects of shocks on schooling tend to be more pronounced in low-income countries than in middle-income countries (Ferreira and Schady, 2008). The children of the poorest households are most likely to suffer adverse consequences as regards education, health and nutrition. This risk adds to the threat of poverty persisting across generations.

External shocks can have direct and long-lasting consequences for education. Droughts in sub-Saharan Africa have had significant effects on enrolment and years in school (Alderman et al., 2006; Ferreira and Schady, 2008). In Zambia, over one-third of those aged 7 to 14 belonged to households that experienced some form of economic shock during 2005. Shocks involving loss and destruction of property were particularly damaging for education, raising the probability of children being involved in full-time work by 14% in low-income households (Understanding Children’s Work, 2009). In Indonesia, the 1997 financial crisis led to significant declines in enrolment among primary school age children, especially in the poorest households (Thomas et al., 2004).

5. Costs of uniforms and textbooks climb sharply upon the transition from primary to secondary school. One review of textbook provision in sub-Saharan Africa found that in eleven countries textbook costs were entirely financed by parents and that, next to tuition fees, this was the largest item in household spending (Read et al., 2008).
Box 3.4: Hausa girls in northern Nigeria — losing out in education

Any international ranking of opportunity in education would place Hausa girls in northern Nigeria near the bottom of the scale. In 2003, half of primary school age girls in Kano state were out of school and in Jigawa state the figure was 89%. Being poor and living in a rural area compounds the disadvantage – in this category, over 90% of Hausa women aged 17 to 22 have fewer than two years of education.

Northern Nigeria is predominantly Muslim. Many parents send their daughters to Islamic schools out of distrust for formal public education, concern over the quality of government schools or the distance to them, or fear of sexual harassment in school or on the way there. Yet the quality of Islamic schooling is highly variable – and the education many young girls receive there is both limited and short-lived.

The experience of Hausa girls illustrates some of the wider challenges involved in reaching those on the margins of education. There are public policy measures that can make a difference, such as building classrooms closer to communities, eliminating informal school fees, integrating Islamic schools that meet quality standards into the government system and improving quality through better teacher training. But in northern Nigeria the most tenacious barriers to girls’ education are often embedded in parental and community attitudes and gender practices.

Removing those obstacles requires more equitable education policies, including wide-ranging incentives for girls’ education, backed by social and political dialogue to change attitudes.

Sources: Rufa’i (2006); Akyeampong et al. (2009); UNESCO-DME (2009).

Other effects of such shocks may be less immediate. Malnutrition in young children of poor families, for example, may not just lower school attendance but also impair cognitive development, learning ability and earnings potential. When children are born in a drought year or experience malnutrition early in their lives, the effects can be seen a decade later in their health and nutritional status, and their educational attainment (Alderman et al., 2006; Alderman et al., 2009). In Ethiopia, children born in a year in which drought affected their district are 41% more likely to be stunted at age 5 than children born in a non-drought year (UNDP, 2007). Economic shocks can push households into long-term poverty. One study in Indonesia found that about half of poverty in 2002 could be traced back to the 1997 economic downturn, even though recovery was well under way (Ravallion, 2008). Underlying gender disparities often lead to girls bearing the brunt of economic shocks. In rural Pakistan, for example, unanticipated economic losses reduced the likelihood of girls being in school, but not boys (Lewis and Lockheed, 2007). Similarly, in rural Uganda, crop losses led to sharp declines in girls’ enrolment and performance in examinations, while the impact on boys was much smaller (Björkman, 2005).

The current economic downturn, along with increases in food and fuel prices, has increased the vulnerabilities that come with poverty. It is too early to establish the impact on education with any accuracy. One survey in Bangladesh found that the sharp rise in food prices in 2007 and 2008 had forced half the poor households covered to remove children from school as a cost-saving measure (Raihan, 2009). As Chapter 1 indicates, there have also been reports of declines in enrolment and increased absenteeism in other countries. In Kenya and Zambia, for example, crisis-related poverty has left some children hungry and too weak to walk to school. Dropout has increased due to inability to cover the costs of schooling and the need for child labour (Hossain et al., 2009). More broadly, there are grounds for concern that a combination of sluggish economic growth, rising unemployment, falling remittances and slower poverty reduction
will add to the pressures on the poorest households, with potentially damaging consequences for education (see Chapter 1).

**Child labour remains a barrier to education**

Child labour is a deeply entrenched obstacle to Education for All. Household poverty forces millions of children out of school and into paying jobs or – especially for young girls – domestic chores.

The International Labour Organization put the number of child labourers aged 5 to 14 at 166 million in 2004 (Hagemann et al., 2006). Not all child labourers are kept out of school. Most combine school and work, though often with damaging effects on their education. Some work because their parents cannot afford to send them to school. Others work to help their families make ends meet or to provide labour in the home. Understanding the interplay between educational disadvantage and child labour is critical not only for education, but also for child welfare and wider national poverty reduction efforts.

Child labour ranges in scope from young girls collecting water and firewood with their mothers to young boys tending cattle and engaging in paid work, and to more extreme and dangerous forms of work. The worst forms of child labour are a direct source of marginalization in education. Over half the children engaged in labour in 2004 were in hazardous work, involving dangerous conditions, long hours or hazardous machinery (Blanco Allais and Quinn, 2009). Such children can be seen every day scavenging for rubbish in Manila, working on building sites in New Delhi or selling newspapers at traffic junctions in Haiti. They are also forced into more invisible forms of labour, such as involvement in sex work.

The degree to which children combine work and school varies by country. There are no upper limit benchmarks, but children working about thirty hours a week or more are unlikely to attend school (Edmonds, 2007); (Box 3.5). Moreover, it cannot be assumed that ability to combine work and school is conducive to learning. Evidence from eleven Latin American countries indicates that this is detrimental to educational achievement (Gunnarsson et al., 2006). In each country, child labourers achieved significantly lower scores in language and mathematics tests in third and fourth grades, controlling for school and household characteristics. Even modest levels of child labour at early ages had adverse consequences for cognitive abilities, with regular work being most detrimental (Gunnarsson et al., 2006; Sánchez et al., 2009).

Poverty has a very direct bearing on patterns of child labour. Poorer children are more likely than wealthier children to work outside the home and less likely to combine work with school (Blanco Allais and Quinn, 2009). In Zambia, children from households in the lowest income quintile are more likely not only to work, but also to face hazardous work conditions (Understanding Children’s Work, 2009).

In urban areas, many child labourers live on streets, either with destitute parents or with other children. These children experience particularly stark forms of marginalization in education. One study covering seven cities in Pakistan found that fewer than 5% of children (living on streets) had completed primary education (Tufail, 2005). A survey in Bangladesh found that only 8% of street children were in school at the time of the survey and only 14% had completed third grade of primary school (Foundation for Research on Educational Planning and Development, 2003).

Child labour in rural areas is often less visible, but no less widespread or damaging. A 2007 survey of children in cocoa plantations in Côte d’Ivoire and Ghana documented striking examples of children applying toxic pesticides, working in extreme heat and using dangerous implements. In Côte d’Ivoire, many children in cocoa production had been trafficked from Burkina Faso and Mali as bonded labourers (Payson Center for International Development, 2008). Côte d’Ivoire and Ghana have introduced laws aimed at curtailing the practice (World Cocoa Foundation, 2009), but the effectiveness of national action and regional cooperation remain of concern. More broadly, governments are often more adept at adopting statements against child labour than at addressing the underlying causes of the problem.

Child labour often magnifies poverty-related gender disadvantage. A common thread across many countries with large gender disparities in education is the disproportionately large share of the household labour burden that young girls carry. In the Lao People’s Democratic Republic, for both urban and rural populations, the average time spent in school falls with poverty and young girls in poor households spend less time in classrooms than young boys. Poor rural girls spend just over two hours a day studying and five hours working, on
average. Young boys spend slightly more time than girls in remunerated employment, while young girls spend more than twice as much time as boys on household activities (King and van de Walle, 2007). The upshot is that young girls from the poorest households are less likely than boys to combine school and work, and more likely to be out of school (Hallman et al., 2007).

Economic shocks can increase the impetus towards child labour. Crop losses, sudden increases in household health costs or parental unemployment can pull children out of school and push them into paying jobs. In the Kagera region of the United Republic of Tanzania, transitory income shocks caused by crop losses were associated with a 30% increase in hours worked by children aged 7 to 15 and a 20% fall in school attendance (Beegle et al., 2006). This example illustrates the interaction between vulnerability and disadvantage in education. Households with a limited coping capacity can be forced to compromise the long-term welfare of children to secure short-term survival.

Child labour confronts policy-makers with wide-ranging challenges. Preventing educational marginalization by saving children from having to work requires not only more effective legislation but also economic incentives aimed at keeping children in school.

**Group-based disadvantages**

Education for All is a principle rooted in the ideas of human rights and equal citizenship. It does not allow for distinctions based on ethnicity, race, language or culture. Yet these group-based identities are among the deepest fault lines in education. In many countries, children born to parents who are members of an ethnic or linguistic minority, a particular racial group or a low caste enter school with poor prospects of success and emerge with less education and lower achievement than do children without these disadvantages.

The processes that lead to group-based marginalization do not lend themselves to generalization but they include formal and informal discrimination, stigmatization and social exclusion linked to social, economic and political power relationships. Many of these processes have deep historical roots in slavery, dispossession or subjugation. The experiences of the K’iche´ in Guatemala, Aboriginals in Australia, low-caste people in India and Kurds in Turkey have evolved from complex histories and are perpetuated through disparate structures. Yet there are some significant common threads, with marginalized groups facing high levels of social discrimination, fewer employment opportunities, more limited rights, and limited prospects for social and economic mobility. All too often their experience in school reinforces and perpetuates their marginalization.

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**Box 3.5: Mali and Zambia – combining child labour and schooling**

Child labour is the rule rather than the exception in Mali and Zambia. Many children in both countries work longer than the average adult in rich countries, with damaging implications for education. However, the consequences vary in scale and severity.

About half of 7- to 14-year-olds in Mali and Zambia were working in 2005, predominantly in rural areas. An alarmingly large proportion of these children – about 80% in both countries – were reported as involved in hazardous work.

Behind these comparable headline figures there were complex variations between school and work. Whereas most working children in Zambia combined the two activities, in Mali about a third of children were reported to be just working and only around 20% combined school and work (Figure 3.23). The average time spent working helps explain the difference. Child labourers in Mali logged an average of thirty-seven hours working each week, compared with twenty-four hours in Zambia.

**Figure 3.23: Patterns of school and work vary.**

*Children aged 7 to 14 by involvement in economic activity and schooling, Mali and Zambia, 2005.*

<table>
<thead>
<tr>
<th></th>
<th>Mali</th>
<th>Zambia</th>
</tr>
</thead>
<tbody>
<tr>
<td>School</td>
<td>29%</td>
<td>41%</td>
</tr>
<tr>
<td>Work and school</td>
<td>21%</td>
<td>35%</td>
</tr>
<tr>
<td>Work</td>
<td>32%</td>
<td>12%</td>
</tr>
<tr>
<td>Neither</td>
<td>18%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Note: Work does not include household chores.


These working children have lower levels of school attendance at every age, especially in Mali. School attendance gaps are relatively small in Zambia up to age 13 or 14, again underlining the more marked trade-off between school and work in Mali.

Why does child labour in Zambia seem more compatible with education? Some children in Mali – notably those with inflexible employment conditions such as those working as domestic labourers and in manufacturing that limit the scope for combining school and work – appear to face particularly severe disadvantages. Mali has more and deeper poverty, and greater gender disparities in education. School-related factors, including distance to school, the duration of the school day and flexibility of the school calendar, could also be significant.

Social deprivation and educational marginalization

Group-based marginalization has multiple sources. Some, such as race, ethnicity and language, are intimately tied up with the cultural identity of the group in question and with the experience of social discrimination. Other factors are related to poverty, health status and wider social circumstances. The borders between these underlying sources of disadvantage are blurred. For example, ethnicity and language are often two sides of the same coin and ethnic or linguistic minorities may face higher levels of poverty.

What is clear from the evidence set out in the first part of this chapter is that group identity is often an aspect of ‘multiple exclusion’ that has a significant bearing on participation and achievement in education (Lewis and Lockheed, 2007).

The situation of indigenous groups in Latin America powerfully illustrates the multiple dimensions of deprivation. Indigenous people, especially women and children, have less access to basic health services. They are also more likely to suffer from nutritional problems. In Ecuador and Guatemala, about 60% of indigenous children under 5 are malnourished – roughly twice the national averages (Larrea and Montenegro Torres, 2006; Shapiro, 2006). In Ecuador, non-indigenous women are three times as likely to receive antenatal care and have a skilled attendant present at birth (Larrea and Montenegro Torres, 2006). Being indigenous raises the probability of being in poverty by between 11% and 30%, depending on the country (Hall and Patrinos, 2006).

Poverty magnifies the barriers facing indigenous children, especially girls. In Guatemala, indigenous girls from extremely poor households enrol in school 1.2 years later than indigenous girls from non-poor households, on average, and are far more likely to drop out. Among 7- to 12-year-olds, Mayan boys and girls are twice as likely as non-indigenous children to combine school and work. For non-enrolled indigenous females, lack of money and housework are cited by parents as the main reason for children being out of school (Hallman et al., 2007).

The experience of indigenous people in Latin America also draws attention to the interaction between marginalization in education and employment. Over the past decade, some indigenous people in Latin America have narrowed the gap with the majority population in terms of years in school. But gains in education have enhanced their prospects for employment and higher wages far less than for non-indigenous people, pointing to discrimination in labour markets (Hall and Patrinos, 2006). This helps explain why progress in reducing poverty among indigenous people has been slow despite expanded access to education. The persistence of high levels of household poverty helps explain in turn why child labour, a major cause of school dropout, has tended to fall more slowly among indigenous people than among non-indigenous people.

Australia provides a striking example of extreme marginalization amid high levels of overall development. The country consistently figures in the top five on the United Nations Development Programme’s Human Development Index. Yet in 2001, it was estimated that Aboriginals and Torres Strait Islanders in Australia would rank around 103 – below the Philippines and around the level of Viet Nam (Biddle and Mackay, 2009; Cooke et al., 2007). Social disadvantage on this scale inevitably affects what Aboriginal children achieve in school.

The marked racial divisions evident in the United States’s education system are also wrapped up in social disparities. Gaps in learning achievement are evident early on. On average, African-American children register lower cognitive development levels by the age of two (Fryer and Levitt, 2006; Table 3.4). Part of the difference can be traced directly to poverty and to parental education. Other significant factors include the number of books in the home and time spent reading (Ferguson, 2007). These disparities point to the importance of concerted pre-school strategies for overcoming group disadvantage, as discussed in Chapter 2.

Similarly, the restricted opportunities experienced by Roma children in school are intimately linked to poverty, unemployment, poor housing and poor health. A survey has found that one-quarter of the Roma population in southern and eastern Europe lives in dilapidated housing. The poverty rate for Roma in Romania is almost three times the national average (UNICEF, 2007a). The invisibility of Roma in national education programmes reinforces their exclusion: in Hungary, most education policies do not mention Roma, the country’s most educationally disadvantaged community (Open Society Institute, 2007).

High economic growth and rapid poverty reduction do not automatically dissolve deeply entrenched
group-based disadvantages. Since the early 1990s, poverty in Viet Nam has been cut by two-thirds, far surpassing the Millennium Development Goal target. Despite the gains, however, the average poverty rate among the country’s 10 million ethnic minority people is 52%, compared with 10% for the majority Kinh (World Bank, 2009d). Minorities also have worse health, nutrition and education indicators, and less access to basic services. Partly because of these inequalities, the benefits of rapid economic growth have trickled down more slowly to ethnic minority groups. And the poverty gap has widened over time. At the end of the 1990s, the poverty rate among the non-Kinh population was two and a half times higher than the average for Kinh. By 2006, it was five times higher (Baulch et al., 2009).

The wider social and economic inequalities driving group-based marginalization in Viet Nam have important consequences for education. While education figures for ethnic minority groups are improving, they still lag far behind those of the Kinh population. One-quarter of minority children enter school late, compared with 5% for Kinh children. Around 30% of minority households report at least one child dropping out of primary school, double the Kinh share (World Bank, 2009d). Two of the four top reasons for dropping out – inability to afford school fees and need for child labour at home – are directly related to poverty.

Low status and social identity

Low status is intrinsic to marginalization. In parts of South Asia, social practices relating to group status are often based on complex ideas about caste. While caste-based discrimination is frequently outlawed through legislation, underlying practices and attitudes are often difficult to change.

In India, the 1950 Constitution banned ‘untouchability’ and provided measures to compensate for the extreme social, education and economic disadvantage arising out of that status. Yet, despite progress in many areas including education, deep caste-based disparities remain [Box 3.6]. Belonging to a scheduled caste or tribe lowers prospects of school attendance.7 Being a girl and living in a rural area brings a further layer of disadvantage. In 2004/2005, just 57% of rural girls aged 12 to 14 from scheduled tribes and 66% from scheduled castes were in school, compared with a national average of 80% (Figure 3.24).

| Table 3.4: Poverty and early cognitive development by race, United States |
|---------------------------------|----------------|----------------|----------------|
| Poverty rate (%)                | White | African American | National average |
| Cognitive development           |       |                 |                   |
| 2-year-olds: Per cent demonstrating proficiency in listening comprehension | 42    | 30             | 37               |
| 2-year-olds: Per cent demonstrating proficiency in expressive vocabulary  | 71    | 56             | 64               |
| 4-year-olds: Per cent proficient at letter recognition                  | 37    | 28             | 33               |
| 4-year-olds: Average overall mathematics score                          | 24    | 21             | 23               |

Sources:

Box 3.6: Living with stigma – the ‘rat catchers’ of Uttar Pradesh and Bihar

‘The higher-caste students tell us that we smell bad,’ one girl said. Another added, ‘The ridicule we face prevents us from coming to school and sitting with higher-caste children.’ These girls from the hamlet of Khalispur, near the city of Varanasi, belong to the Musahar or ‘rat catcher’ community of eastern Uttar Pradesh, India.

Khalispur has a government primary school. Despite an entitlement to receive a stipend, midday meals and uniforms, few Musahar girls attend. The testimony of some of them powerfully demonstrates the force of social attitudes in creating disadvantage: for these girls, school is a place where they experience social exclusion, as stigmatization undermines the self-esteem vital to effective learning. Subtle forms of discrimination reinforce caste hierarchies in the classroom. ‘We are forced to sit on the floor,’ one girl said. ‘The desks and benches in the classroom are meant for the children from the higher castes.’

The Musahar community, which spans eastern Uttar Pradesh and Bihar, has high levels of poverty and low levels of literacy among adults. Apart from catching rats in rice fields, the livelihoods of the Musahar typically revolve around crushing and carrying stones, supplying brick kilns, making leaf plates and performing casual day labour. In contrast to some other low-caste groups, the Musahar have a weak political voice.

According to Musahar elders, government policies have improved but social attitudes have not: ‘They do admit our children to school and we now have legal rights, but the behaviour of children from other castes and the teachers is a problem. Our children do not dare attend the school.’

Interviews courtesy of Sudhanshu Joshi, Global March Against Child Labour

7. Scheduled castes are the former untouchables and scheduled tribes are India’s indigenous populations. Both are listed in schedules appended to India’s constitution as groups deserving affirmative action measures.
To what extent do these differences stem from distinctive caste and tribe disadvantages rather than wider social and economic factors? That is a key question for policy-makers seeking to equalize opportunity. Research for this Report helps provide a partial answer (Bhalotra, 2009). Using household survey data, and controlling for household and individual characteristics, the study found that about 60% of the attendance gap for scheduled-caste children aged 6 to 14 could be attributed to household characteristics, mainly poverty and lower parental education. For scheduled-tribe children in the same age group, household characteristics weighed less heavily, accounting for about 40% of the attendance gap. One conclusion to be drawn for members of both scheduled groups is that poverty matters a great deal in perpetuating educational disadvantage. However, the non-poverty component is larger for scheduled tribes partly because of the weight of social and cultural discrimination.

Public attitudes have consequences that go beyond school attendance. Institutionalized stigmatization can erode self-confidence and levels of expectation, undermining children’s potential for learning. One particularly striking illustration comes from an experimental investigation into the impact of caste perceptions on test scores (Hoff and Pandey, 2004). Children aged 11 and 12 were chosen at random from a low caste and three high castes, and given a series of puzzles to solve. When caste was not announced to the participants, it had no bearing on the initial score or on the improvement in score registered in subsequent test rounds. But when caste was announced before the test, the scores for low-caste children fell dramatically (Figure 3.25).

These findings underline the degree to which social identities that are a product of history, culture and personal experience can create pronounced education disadvantages through their effects on individual expectations.

The critical role of language

Language and ethnicity are deeply intertwined. Having a distinctive language is often a crucial element of personal identity and group attachment. Just as a local language may be a point of association for members of an ethnic group, it can also be an element in their marginalization. People who cannot speak a country’s dominant language may have less access to written and spoken sources, restricting their opportunities for employment and social mobility (Smits and Gündüz-Hosgör, 2003; Smits et al., 2008). Parents who do not speak the official language in which their children are being educated may have less opportunity to engage with teachers, education authorities and homework. And their children may not grasp what is being taught if teachers do not speak their home language. The resulting inequalities in opportunity are a major factor in perpetuating educational disadvantage.

8. In three test rounds, scores for low-caste children fell by 14%, 25% and 39%.
in marginalization in countries where ethnicity and language are strongly associated with social deprivation.

The sheer scale of linguistic diversity in the world today and its consequences for achievement in education are not sufficiently recognized. There are nearly 7,000 spoken languages. Every world region is multilingual. Sub-Saharan Africa has 1,200 to 2,000 languages (Alidou et al., 2006). Cameroon alone has more than 200 languages, of which thirty-eight are written. In East Asia, Thailand has over seventy and Indonesia more than 737. Latin America’s indigenous peoples speak an estimated 551 languages (Dutcher, 2004).

Education systems seldom reflect linguistic diversity. Many countries stress the importance of children learning in their mother tongue or home language. Nevertheless, about 221 million school age children speak languages that are used at home but not recognized in schools or official settings (Dutcher, 2004).

The degree of alignment between home and school language has a critical bearing on learning opportunities. Children who study in their mother tongue usually learn better and faster than children studying in second languages (UNESCO Bangkok, 2008; Woldemikael, 2003). Pupils who start learning in their home language also perform better in tests taken in the official language of instruction later in their school careers (UNESCO Bangkok, 2008). The benefits extend beyond cognitive skills to enhanced self-confidence, self-esteem and classroom participation (Alidou et al., 2006).

Decades of cognitive research have established the language conditions most conducive to learning (Alidou et al., 2006; Dutcher, 2004; UNESCO Bangkok, 2008). Translating those findings into policies that create an enabling environment for ethnic and linguistic minorities is not straightforward. Linguistic diversity creates challenges within the education system, notably in areas such as teacher recruitment, curriculum development and the provision of teaching materials. Moreover, language policy in education is not just about learning but is intimately wrapped up in power relationships and history.

In many countries, the dominant languages used in education are connected with social, political and cultural subjugation. Colonization has left a deep imprint. For most pupils entering primary school in francophone Africa, French is still their first language of instruction (Alidou et al., 2006). During the 1880s, authorities in New Zealand banned the teaching or use of the Māori language in native schools, arguing that it was an impediment to ‘national progress’. One hundred years later, the language was spoken by less than one-quarter of the Māori population and drifting towards extinction (Wurm, 1991). Across much of Latin America, language was key to the exclusion and exploitation of indigenous people by Spanish-mestizo elites (Klein, 2003). Indigenous organizations in the region have seen ‘decolonization of the school’ as a vital part of wider political emancipation.

Governments have often seen the forging of a common linguistic identity as crucial to the development of a national identity (Daftary and Grin, 2003). The Turkish Constitution of 1923 includes a provision that ‘no language other than Turkish shall be taught as mother tongue to Turkish citizens at any institutions of teaching or education’ (Kaya, 2009, p. 8). While legislation adopted in 2002 allows greater flexibility, access to minority language primary education remains limited.

Language policy in education raises complex issues and potential tensions between group identity on the one hand, and social and economic aspirations on the other. Parents in many countries express a strong preference for their children to learn in the official language, principally because this is seen as a route to enhanced prospects for social mobility (Alidou et al., 2006; Cueto et al., 2009; Linehan, 2004). Labour market factors often figure prominently. In response to changing job opportunities and the earnings premium associated with use of English, lower-caste girls and young women in Mumbai are switching from primary and secondary schools teaching in Marathi to those teaching in English (Munshi and Rosenzweig, 2003).

Education systems have to perform a delicate balancing act. First and foremost, they need to create the enabling conditions for effective learning. Ideally, this implies learning the official language as a subject in primary school while receiving instruction in the home language. It also implies a school curriculum that teaches the majority population respect for ethnic minority language and culture. But education systems also have to ensure that children from disadvantaged minority backgrounds learn the skills they need to participate successfully in social and economic life, including language skills.
Breaking long-established institutional patterns is difficult. This is true even in countries with governments that acknowledge the disadvantages ethnic minorities face, as the experience of Viet Nam shows (Box 3.7). In Latin America, most countries have intercultural bilingual education policies, some of them dating from the 1920s. Today, such programmes aim at incorporating indigenous languages into national education systems by giving children a chance to learn in their home language before moving on to Spanish. Despite some significant achievements, however, these programmes face major challenges in several countries:

- **Limited coverage.** Many indigenous children do not have access to intercultural bilingual education. In Guatemala and Paraguay, legislation provides for bilingual education in just the first three grades of primary school and, in reality, children are often taught only in Spanish. In Guatemala, 74% of children aged 7 to 12 years were reported as receiving classes only in the Spanish language in 2006 (López, 2009). In Peru, only around 10% of indigenous children attend intercultural bilingual schools. Coverage is far lower in urban than in rural areas (Cueto et al., 2009).

- **Poor quality.** Where indigenous language teaching is available, it is often of poor quality, with schooling compounding disadvantages linked to social and economic deprivation. Of about 900 teachers working in indigenous communities in Paraguay, a third have completed only basic education and fewer than two-thirds report speaking the local language (López, 2009). In Peru, which has been implementing the intercultural and bilingual model since 1972, one study in the south of the country found that half of teachers in intercultural and bilingual education schools could not even speak the local indigenous language. Moreover, bilingual materials provided by the Ministry of Education were not being used (Cueto et al., 2009).

- **Limited scope.** Intercultural bilingual education focuses on more effective integration of indigenous children into mainstream education. For many indigenous groups this objective is too limited. In several countries, indigenous political movements have mobilized behind demands for education reforms and for curriculum content that focuses on wider political concerns. In Bolivia, indigenous education councils have been pressing for a new education law that emphasizes multiculturalism, ethnic diversity and the values of indigenous culture. In Guatemala, where indigenous people’s rights were brutally suppressed during the civil war, the period since the Peace Accords in 1995 has been marked by the development of a vigorous Mayan political movement focusing on language as one element in a broader campaign against discrimination. In both countries, many indigenous political leaders are looking to strengthen intercultural education to address deeper problems of discrimination and inequality.

**Box 3.7: Tackling the ethnic divide in Viet Nam**

The government of Viet Nam recognizes that problems facing ethnic minorities are a major barrier to universal primary education. It has established an extensive system of financial transfers targeted at households and communes with large minority populations. A 1999 law allowing minority languages to be used in education recognizes the importance of home language.

Implementing that law has proved difficult, however. Part of the problem is a serious shortage of ethnic minority teachers. While ethnic minority children account for 18% of the primary school age population, ethnic minority teachers make up just 8% of the teaching force. Moreover, few of these teachers are posted to ethnic minority areas. And not all have the training or experience to teach bilingual education. As a result, Kinh remains the dominant language of instruction for most ethnic minority children.

Demographic factors also appear to have an important bearing on the language of instruction. Analysis undertaken for this Report compared home language education in Lao Cai, a mountainous northern province with a large ethnic minority population, with that in Phu Yen, a south-central coastal province in which ethnic minorities account for just 5% of the population. Minority groups in Phu Yen have far less access to home language courses, partly because their children attend overwhelmingly Kinh-dominated schools.

Sources: Truong Huyen (2009); World Bank (2009d); UNESCO-DME (2009).
and to help change power relationships in society (López, 2009; Luykx and López, 2007).

**Location and livelihoods**

Disadvantages linked to poverty, ethnicity and language are often reflected in human geography. Children living in slums, remote rural areas or conflict-affected zones are typically among the poorest and most vulnerable in any society. Potentially, they have the most to gain from education. Yet they live in areas with the most limited access to basic services, including education. Restricted education and livelihood opportunities reinforce the poverty trap. This section looks at institutionalized disadvantages linked to location that perpetuate marginalization in education.

**Right to education denied to slum dwellers**

Kibera is one of the largest slums in sub-Saharan Africa. Located next to the Royal Nairobi Golf Course and a short distance from leafy suburbs that are home to some of Kenya’s wealthiest people, it has an estimated population of 1 million. Most lack access to clean water, sanitation and other public services. It is a short walk from Kibera to some of Kenya’s finest primary schools, yet the vast majority of the slum’s children are locked out of even the most basic opportunities for education.

Kibera is a microcosm of a wider problem. Half the world’s population now lives in cities and urban growth is highest in the developing world (UN-HABITAT, 2008). In the midst of urban prosperity and opportunity, almost every major city has large islands of slums that are centres of social deprivation. On one estimate, one in three urban dwellers in the developing world – 900 million in total – resides in a slum (UN-HABITAT, 2006). In an increasingly urbanized world, slum populations are growing by over 20 million a year as rural poverty and the lure of opportunity create a steady stream of new arrivals.

Not all slum environments are equivalent in the scale of deprivation. One study comparing slums in Nairobi and Dakar, Senegal, found that while the inhabitants of the latter were poorer, they were four times more likely to have access to water and electricity. Just under a third of Nairobi’s population lives in slums. Children in these settlements face disadvantages at many levels. Less than 6% of households have piped water in their homes and even fewer have access to sanitation facilities. Poor sanitation and inadequate garbage collection cause major health problems. Children in Nairobi’s slums face higher mortality rates than those in rural areas (World Bank, 2009).

Many governments have little idea how many children live in informal settlements and are failing to respond to the major new education policy challenges created by the rapid growth of slums. Because many settlements are ‘illegal’, they are not recognized in government plans or provided with public water, sanitation, health or education services (UNESCO-IIEP, 2009).

What schooling is available is often supplied by non-government organizations, churches or private entrepreneurs, with little government support or regulation. As evidence from slums in Dhaka, Bangladesh, shows, the poor generally have little if any choice of education provider (Box 3.8). The financing of education in slums such as those in Nairobi is largely private: parents have to pay for poor-quality private schooling, while non-slum children have access to free government education (Oketch et al., 2008).

Household poverty, poor child health and nutrition, and extensive child labour combine to create a formidable barrier to education. Even where schools are not far away, security concerns present an additional hurdle to access: 60% of girls interviewed in Kibera expressed fear of being raped. It was not uncommon for boys and girls to have witnessed physical violence. A common response to fear of violence and harassment in slums is to stop going to school (Erulkar and Matheka, 2007; Mudege et al., 2008).

Restricted entitlements are among the most potent elements of educational marginalization in slums. Parents often cannot secure their children’s human right to education because they lack official residency status. For purposes of school registration, the authorities do not recognize that these children even exist. One study of 400 slum-dwelling households in Delhi found that only half of primary school age children were in school, compared with a citywide enrolment rate in excess of 90% (Tsujita, 2009). Although government schools were within walking distance, only a third of children in the sample had a birth certificate, which is mandatory for admission to government schools.

In Delhi’s slums, only a third of children surveyed had a birth certificate, which is mandatory for admission to government schools.
Residency requirements were another major barrier, as migrants from other states make up a large share of the slum-dwelling population. Rural migrants to urban areas in China face similar problems, with the hukou (household registration) system restricting access to basic education (Box 3.9).

Many governments lack credible public policies for providing education and other basic services in fast-growing informal settlements. Authorities often claim that legal entitlement to education and other services in all slums would act as incentives for accelerated rural-urban migration. While this concern is not without foundation, depriving children of their right to an education through government inaction is not an appropriate response.

Remote rural areas are underserved

Rural children face heightened risks of marginalization in education, especially if they are poor and female. Rural-urban divides in education often overlap with wider inequalities. In many countries, rural areas tend to have higher concentrations of poverty and less access to health care. Marginalization in education both mirrors and magnifies these disparities.

Low population density in rural areas often means children have to travel greater distances to school, sometimes across difficult terrain. In addition, rural parents tend to be less educated. These concerns are compounded by government failure to provide schools or attract good teachers to the countryside. Traditional cultural practices and attitudes also play a role.
Remoteness is one of the strongest factors in marginalization. The poorest households in many rural areas are the furthest from roads, markets, health services and schools. In Nicaragua, the incidence of extreme poverty is 20% higher in the central rural region, where people have to travel twice as far as the national average to reach a school or health clinic (Ahmed et al., 2007).

Distance to school is often a major determinant of participation by ethnic minorities. In India, children from scheduled tribes, many of them living in dispersed communities in remote areas, face some of the longest treks to school in the country (Wu et al., 2007). In the Lao People’s Democratic Republic, schools in rural and predominantly non-Lao Tai areas are less likely to offer a full primary education cycle, and the availability of lower secondary schools is far more restricted compared with Lao Tai areas. Only 80% of rural non-Lao Tai children have a primary school in their village and only 4% have a lower secondary school. The shares for the majority Lao Tai children are significantly higher (88% and 17%, respectively). Such differences help explain why only 46% of poor non-Lao Tai girls aged 6 to 12 attend school in rural areas, compared with 70% of poor rural Lao Tai girls (King and van de Walle, 2007).

In China, children’s right to education can run up against residency requirements that limit access to schooling. The full extent of rural-urban migration in China is unknown. One estimate is that 98 million rural migrants live in China’s cities, including 14 million children. Attracted by employment and an escape from rural poverty, many migrants live in informal temporary housing in areas with limited public services. Migrant children are among the most educationally marginalized in China, largely because of the registration system called hukou. Under the hukou system, city schools can only admit students registered as official inhabitants with a permanent home in the school district. School budgets are based on the number of official students registered by authorities. Individual schools can admit unregistered children, but typically require parents to pay a fee to compensate for the lack of government funds. This arrangement makes education unaffordable for many migrant families.

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Education figures for major cities reflect the consequences of the hukou system. Only two-thirds of Beijing’s 370,000 migrant children were enrolled in public schools. Another quarter were reported as attending unauthorized migrant schools. These schools, a response to exclusion from the public education system, are of questionable quality and some have been forced to close.

Chinese authorities, acknowledging the problems facing rural migrants, have introduced reforms. City authorities have been required to accommodate holders of rural hukou with temporary residence and employment permits, reducing the pressure on schools to charge fees. Even so, the children of many migrants, including those working in the informal sector, continue to face restricted opportunities for education.

Lack of nearby facilities has implications for both the time and the energy needed to get to school. Country surveys in West Africa from the 1990s revealed high average walking distances in several countries, including 7.5 km in Chad, 6.6 km in Mali, 5 km in Senegal and 4 km in the Central African Republic. Distances are likely to be higher than these averages in remote areas (Filmer, 2004).

Even relatively short distances to school can significantly reduce demand for education. A 2002–2003 survey of 179 villages in the western Sahelian region of Chad found that for distances over a kilometre, enrolment declined steeply, with fewer than 10% of children typically going to school. Physical barriers such as rivers and forests could considerably increase the time required to reach school (Lehman et al., 2007).

Girls’ attendance is particularly sensitive to journey times. Household surveys in many countries identify distance as a major factor in parents’ decisions to keep daughters out of school (Kane, 2004, and World Bank, 2005d, cited in Theunynck, 2009; Glick, 2008; Huisman and Smits, 2009). Explanations vary, but concerns over security and domestic labour needs figure prominently.
**Pastoralist lifestyles demand better education responses**

Pastoralists in sub-Saharan Africa and South Asia face extreme educational disadvantage [see Figure 3.5 above; Dyer, 2006]. By one rough estimate, as many as 8.5 million children from nomadic households do not attend school globally (Carr-Hill, 2009).

Why do pastoralist children face such restricted opportunities for schooling? Livelihood pressures are an important factor. Pastoralists are not always the poorest rural people, especially if their livestock assets are taken into account. But they often rely heavily on boys for tending cattle and girls for domestic chores, restricting children’s time available for formal schooling (Ruto et al., 2009). Education loses out because labour demands take priority.

On the other hand, pastoralists often see education as a route to more diverse and less insecure livelihoods. This finding emerges from research in the Somali region of Ethiopia and among the Turkana of Kenya and the Karamojong of Uganda (Devereux, 2006; Krätli, 2006; Ruto et al., 2009). Paradoxically, environmental degradation, drought and cattle raids may be stimulating interest in the role formal education can play in providing skills needed to cope with contemporary livelihood challenges (Dyer, 2006).

School infrastructure is not the only problem. Pastoralists often see curricula as having little relevance to their lives. They are typically absent from the images and stories in primary school textbooks, reinforcing the cultural distance between home and school. If pastoralism is mentioned at all, it may reflect the view of many non-pastoralists that the practice is outdated and ignorant (Krätli, 2006), rather than a specialized and sustainable livelihood.

Early marriage for girls is another barrier to education in some pastoralist communities. So is a deeply engrained belief that female education may be of less value. A proverb of the Gabra community in northern Kenya says: ‘God first, then man, then camel, and lastly girl.’ This

**Box 3.10: Kenya’s pastoralists – ‘we need schools that follow our herds’**

Nasra Hassan, 7, has had a taste of education. She was enrolled in standard one at Basaa Primary School in the Merti Division of Isiolo, a remote district of Northern Kenya. But then the drought hit. The current drought has left an estimated 4 million Kenyans in need of emergency food aid. Pastoralist areas have been among the worst affected. Child malnutrition is rising and households have seen their livestock herds decimated.

The harm to education has been less visible – but no less damaging for long-term efforts to reduce poverty. Nasra’s parents no longer have the money they need to pay for her education. And as herders have to travel farther and farther in search of water for their animals, there are fewer people at home to help with household chores, so Nasra is expected to spend more time looking after the smaller animals and collecting water for home use. Instead of studying, she is now busy washing, cooking, and fetching water and firewood. The drought has forced her out of school.

The drought is not the only barrier to education among pastoralist children. Many parents and village elders have ambivalent attitudes to schooling, partly because they are acutely aware of the trade-offs they face. As one parent eloquently put it, ‘We have to choose between wealth and knowledge — between having a prosperous herd and having educated children. We need our children to tend the cattle, even though we know they need an education.’

The tension between securing livelihoods and gaining education is a recurrent theme in pastoral areas. Formal education happens in a fixed context — the classroom. By contrast, pastoralist survival often depends on children following herds over large areas.

Resolving the dilemma will require more flexible and more mobile ways to provide education. As one village elder in Isiolo said, ‘The education system that fits us will be the one that follows us, that follows our animals.’

Interview courtesy of SOS Sahel
explains a reluctance to sell camels to finance girls’ education, unlike for boys (Ruto et al., 2009, p. 11). The social attitudes behind such sentiments are deeply damaging for girls’ education.

The diversity of pastoralist experience cautions against generalization. Yet even in countries making strong progress in primary education, pastoralist children are often left far behind. Kenya is now looking beyond primary schooling to universal secondary education, but that vision contrasts strongly with reality in the country’s ten most arid districts. Inhabited predominantly by pastoralist communities, these districts have some of the country’s lowest enrolment ratios and largest gender disparities, with net enrolments less than 30% for boys and 20% for girls in the three worst-performing districts located in the North Eastern Province (Figure 3.27).

**Armed conflict fuels educational marginalization**

Armed conflict contributes to marginalization in education in many ways. Most obviously, it exposes children to the risk of violence and trauma. In addition to driving people from their homes and creating large refugee populations, conflict can destroy schools and create risks for pupils and teachers. Moreover, conflict can leave a legacy of distrust, instability and weak governance found in many of the world’s most fragile states, with governments often unable or unwilling to provide basic services.

While firm evidence of the impact of armed conflict is limited, international data clearly reflect a close association between conflict and marginalization. Over one-third of primary school age children who do not attend school – 25 million in total – live in conflict-affected poor countries (see Chapter 2). Many of these countries have among the world’s worst child health and education figures. In Somalia, one in seven children does not survive to age 5 and just 22% of those who do reach primary school age are in school – one of the world’s lowest enrolment levels (UNDP, 2009).

Mass displacement caused by conflict locks millions of children into a future of extreme disadvantage in education. Forced to flee their homes, parents often have to resettle in areas ill equipped to provide good basic education. At the end of 2008, there were an estimated 42 million forcibly displaced people worldwide: around 26 million were displaced within their own countries and 16 million had to flee across borders (Internal Displacement Monitoring Centre, 2009; UNHCR, 2009). Children aged 5 to 17 comprise around one-third of the global population of forcibly displaced people (Women’s Commission for Refugee Women and Children, 2004). Indigenous peoples and ethnic minorities make up a disproportionate share of displaced populations.

Internal debates on refugees often focus on issues affecting rich countries. Yet developing countries bear the brunt of cross-border displacement. Countries including Chad, Kenya, Uganda and the United Republic of Tanzania have absorbed millions of people displaced by conflicts in the Democratic Republic of the Congo, Somalia and the Sudan. Pakistan is host to the world’s largest refugee population, having absorbed over 2 million people uprooted by violence in Afghanistan (UNHCR, 2009; Winthrop, 2009a). Struggling to achieve universal primary education for their own children, these countries are ill equipped to provide education to large, vulnerable, extremely poor refugee populations that often speak different languages. The international aid system offers only limited support. Children end up either studying a curriculum that is alien to them or with no schooling at all. In Pakistan, a refugee census in 2005 estimated that 1 million Afghan refugee children were out of school (Winthrop, 2009a).

Internal displacement can also create wide-ranging problems for education, overloading the system in areas of resettlement. Pakistan’s recent experience
Students are often absent because they spend hours lining up for rations and water.  
Abdul, Philippines

Box 3.11: The human face of conflict in the Philippines

Muhammed’s new home is a tent on the grounds of a school, yet he has little time to attend class. For him and many other children in an evacuation camp, helping his parents supplement meagre food rations is now his priority. ‘I can only go to classes in the morning because I have to look for vegetables and firewood outside the camp and return before dark,’ he said.

Muhammed, 13, is the eldest of five children who are taking refuge with their parents and grandparents in a camp set up in the Datu Gumbay Piang Elementary School in Maguindanao.

Heavy clashes between the military and separatist rebels in the Mindanao region of the Philippines have left hundreds of thousands of civilians stranded in evacuation camps, often set up in schools such as this one. The Datu Gumbay Piang centre has reportedly become home to the highest number of internally displaced persons since the outbreak of the fighting.

For the moment Muhammed and his family consider themselves lucky to have a tent to live in. ‘Some of the refugees have no choice but to make their homes inside the classrooms or take shelter under the school buildings when it rains,’ said Bernie Abdul, an evacuee working in the school.

Most of the children come to class to escape the dismal living conditions in their tents. But there is no immediate escape from the destruction and violence they have witnessed. ‘When the children are in class, they are either lethargic or very nervous because we often hear howitzers being fired not far from us.’

Muhammed is not the only child in the camp who is unable to attend school regularly. Abdul explained: ‘Students are often absent because they spend hours lining up for rations and water at the pump or because they’re sick. Living in an unhealthy environment without running water and sanitary facilities has affected the children physically and emotionally as well.’

Interviews conducted by Ross Harper Alonso for this Report

Again illustrates the scale of the problem. With 2.5 million people displaced from the North West Frontier Province in 2008 by fighting between the government and Taliban militants, schools in other parts of the country came under pressure (Winthrop, 2009b). In the Philippines, hostilities in 2008 and 2009 between government forces and armed groups led to the displacement of 750,000 people, severely disrupting children’s schooling (Amnesty International, 2009) (Box 3.11).

Violent conflict can touch the lives of children in many ways, including enforced recruitment as soldiers. At the end of 2007, child soldiers were directly involved in armed confrontations in seventeen countries, including Afghanistan, Chad, Somalia and the Sudan (Coalition to Stop the Use of Child Soldiers, 2008). In Somalia, the Transitional Federal Government has reportedly recruited over 1,000 children into its armed forces, most of them directly from schools (UN General Assembly Security Council, 2009).

Apart from missing out on education, child soldiers often suffer psychological trauma, hampering prospects for a return to education. During the civil war in Sierra Leone that started in 1991, over 15,000 children are estimated to have been forced to serve in military groups. After the end of the conflict in 2002, schooling was seen as a way for the former soldiers to recover some of their lost childhood. However, schools were ill-equipped to provide the psychosocial support necessary to enable them to readjust to normal life (Betancourt et al., 2008).

Other children experience trauma as a result of being part of a civilian population caught in violent conflict. The process of reconstructing education in Gaza will require not only repairing physical infrastructure but also measures to support traumatized children (Box 3.12).

In some cases, education is targeted as a symbol of government authority, with schools subject to armed attack, and pupils and teachers threatened with murder, injury, abduction and rape. In Afghanistan, 670 schools were closed in early 2009 because of security threats, depriving 170,000 children of education. In the three southernmost provinces of Thailand, separatist groups hostile to Buddhist values and Thai-language teaching have attacked schools. In the past five years, 99 teachers have been reported killed and 296 schools have been firebombed (O’Malley, 2009).

Groups within the Taliban in Afghanistan and Pakistan have targeted girls’ schools, both to challenge government authority and to assert values hostile to equal opportunity in education. In the Swat district of Pakistan, the Taliban destroyed 108 girls’ schools and damaged 64 other schools between 2007 and May 2009. During 2008, local Taliban leaders ordered a ban on women teachers and girls’ education. In response, 900 schools closed or stopped admitting girls and fear created by the decree led to the withdrawal of 120,000 girls from school (O’Malley, 2009).
Disability

Disability is one of the least visible but most potent factors in educational marginalization. Beyond the immediate health-related effects, physical and mental impairment carries a stigma that is often a basis for exclusion from society and school. The impact is often worse for poorer households.

Attitudes towards disability have changed over time. Until relatively recently, the ‘medical model’ was dominant: those with disabilities were seen as having a condition that set them apart from the rest of society. That attitude gave rise to discrimination, isolation and stigmatization. It is now increasingly accepted that, while disabilities involve varying levels and types of impairment, it is social, institutional and attitudinal barriers that limit the full inclusion of people with disabilities. Understanding disability in this way highlights the importance of identifying and removing the barriers. Education has a key role to play in changing attitudes.

Poverty is both a potential cause and a consequence of disability. In several countries, the probability of being in poverty rises in households headed by people with disabilities (McClain-Nhlapo, 2007). In Uganda, evidence from the 1990s found that the probability was as much as 60% higher (Hoogeveen, 2005). Those with disabilities are much less likely to be working. Other family members may also be out of work (or school) to care for them. Inadequate treatment, along with poor families’ inability to invest sufficiently in health and nutrition, reinforces the problems people with disabilities face (Bird and Pratt, 2004). These links to poverty, combined with stigma and discrimination, are a significant factor in their educational marginalization.

While globally comparable, reliable data are notoriously difficult to obtain, one widely cited source estimates that 150 million children worldwide live with disabilities (WHO and UNICEF, 2008). Around four in five children with disabilities are in developing countries. In addition, many millions of children live in households with parents or relatives who have disabilities. At all ages, levels of both moderate and severe disability are higher in low- and middle-income countries than in rich countries. They are highest in sub-Saharan Africa (WHO and UNICEF, 2008). The scale of disability and its concentration in the world’s poorest countries contributes significantly to marginalization in education.

Systematic under-reporting of disability is a serious problem. To take one example, a 2004 census in Sierra Leone reported only 3,300 cases of mental impairment, while a detailed national survey the year before had estimated the real figure to be ten times higher (World Bank, 2009c). One reason for under-reporting is that stigmatization often makes parents and children reluctant to report disability.

Many impairments can be traced back to poverty, poor nutrition and restricted access to basic services (Yeo and Moore, 2003). Asphyxia during birth, often resulting from the absence of a skilled attendant, leaves an estimated 1 million children with impairments such as cerebral palsy and learning difficulties (UNICEF, 2008b). Maternal iodine deficiency leads to 18 million babies being born with mental impairments and deficiency in vitamin A leaves about 350,000 children in developing countries blind (Micronutrient Initiative et al., 2009).

Conflict contributes to disability directly through physical threats and indirectly through effects on poverty, nutrition and health care. For every child killed in warfare, it is estimated that three are left behind. Around four in five children with disabilities.

Box 3.12: Education destruction and reconstruction in Gaza

Conflict in 2008 and 2009 gravely affected the education system in Gaza. The circumstances surrounding the violence are subject to claim and counter-claim. In a report presented to the United Nations General Assembly, Justice Richard Goldstone documented evidence of both sides targeting civilian populations. What is not in question is the scale of the human and physical damage inflicted by Israeli military actions.

Part of the damage can be counted in terms of lives lost and people injured. It is estimated that 164 students and 12 teachers were killed. Many more suffered long-term injuries. Infrastructure was severely affected. While estimates vary, Justice Goldstone reported that some 280 schools and kindergartens were identified as destroyed or badly damaged. Restrictions on transport of building materials have delayed reconstruction.

Less easy to document are the effects of childhood trauma. Violent conflict has left deep scars in Gaza society. Research in Gaza has identified post-traumatic stress disorder as a major problem for young people, with 69% of adolescents affected and 40% reporting moderate or severe depression. Such conditions create severe educational disadvantage.

The scale of violence experienced by civilian populations in 2008 and 2009 has compounded the disadvantage. Many children have returned to school suffering from anxiety, the emotional shock of losing parents or siblings and the memory of acts of extreme violence. The consequences for education are likely to be far reaching and long lasting.

Sources: O’Malley (2009); United Nations (2009a); Elbedour et al. (2007).
In Burkina Faso, just 10% of children with a hearing or speech impairment were in school in 2006.

The link between disability and marginalization in education is evident in countries at different ends of the spectrum for primary school enrolment and completion. In Malawi and the United Republic of Tanzania, having disabilities doubles the probability of children never having attended school, and in Burkina Faso it increases the risk of children being out of school by two and a half times (Kobiané and Bougma, 2009; Loeb and Eide, 2004; United Republic of Tanzania Government, 2009). In these countries, inadequate policy attention to disability is clearly holding back national progress towards universal primary education. In some countries that are closer to achieving that goal, people with disabilities represent the majority of those left behind. In Bulgaria and Romania, net enrolment ratios for children aged 7 to 15 were over 90% in 2002 but only 58% for children with disabilities (Mete, 2008).

‘Disability’ is a generic term covering a multitude of circumstances. Children with, say, severe autism are likely to face very different education-related challenges than children who are partially sighted, or who have lost a limb. Impairments that affect the capacity to communicate and interact in ways common in mainstream schools can impose particularly high practical and social obstacles to participation in education.

A closer look at national data often reveals markedly different consequences for various impairments. In Burkina Faso, children reported as deaf or mute, living with a mental impairment or blind were far less likely to be enrolled in school than those with a physical impairment. In 2006, just 10% of deaf or mute 7- to 12-year-olds were in school (Kobiané and Bougma, 2009); (Figure 3.28). The attendance rate for children with a physical impairment was 40%, only slightly below those with no impairment. In Uganda, recent evidence suggests dropout rates are lower among children with visual and physical impairments than among those with mental impairments (Lang and Murangira, 2009).

Children with disabilities face many challenges in education. Three of the most serious involve institutionalized discrimination, stigmatization and neglect, from the classroom to the local community and in the home. Children with disabilities are often isolated within their societies and communities because of a mixture of shame, fear and ignorance about the causes and consequences of their impairment.

One qualitative study of attitudes towards children with autism in Ghana revealed they were widely described as ‘useless and not capable of learning, [...] stubborn, lazy, or wilfully disobedient’ (Anthony, 2009, pp. 12–13). In a statement with wider application, the Ghanaian Ministry of Education, Sports and Science has powerfully captured the social prejudices that shape the education disadvantages associated with disability: ‘The education of children with disabilities is undervalued by families, there is a lack of awareness about the potential of children with disabilities, children with disabilities in mainstream schools receive less attention from teachers and there is an over-emphasis on academic achievement and examination as opposed to all round development of children’ (Ghana Ministry of Education, Science and Sports, 2008, pp. 60–61).

Education systems and classroom experience can help counteract the marginalization that children with disabilities face. However, they often have the opposite effect. Insufficient physical access, shortages of trained teachers and limited provision of teaching aids can diminish opportunities. Many schools, particularly in remote rural areas or in slums, are physically inaccessible to some children with disabilities. Children with sensory or mental impairments can find schools noisy, confusing and threatening. The grossly inadequate level of provision for children with disabilities in general schools often drives parents and groups representing people with disabilities to demand separate provision (Lang and Murangira, 2009).

That demand is both understandable and is a symptom of wider problems. Putting children with disabilities in special-needs schools or institutions can reinforce stigmatization. It can also deny them a chance to participate in mainstream education, build relationships and develop in an inclusive environment. Moreover, special schools are often
chronically underfunded and lack either skilled teaching staff or the equipment needed to deliver a good education.

Education planners need to recognize that giving children with disabilities a level of access and quality of education equivalent to that enjoyed by other children often entails increased financing. Additional resources are needed to provide teachers with specialized training and children with specially designed learning materials to realize their potential. Families may also require additional financial support. One study in Bangladesh found that the parents of children with disabilities faced costs for aids, appliances and health care that were three times the average household budget for raising children (Chowdhury, 2005, in Marriott and Gooding, 2007). Overcoming a legacy of institutionalized disadvantage can be difficult even in countries with a strong commitment to more inclusive education, such as India (Box 3.13).

Figure 3.28: Burkina Faso’s children with disabilities face deep but varied levels of disadvantage
% of children aged 7 to 12 and 13 to 16 attending school, by nature of impairment, Burkina Faso, 2006

![Graph showing school attendance rates by nature of impairment in Burkina Faso, 2006.](chart.png)


Box 3.13: Prejudice limits educational opportunities for children with disabilities in India

Education planning documents in India enshrine a strong commitment to inclusive education. The aim is to provide all children with disabilities, irrespective of the type or degree of impairment, with education in an ‘appropriate environment’, which can include mainstream and special schools as well as alternative schools and home-based learning. Delivering on this commitment requires a concerted political effort backed by reforms in service provision.

Yet disability remains a major brake on progress towards universal primary education in India. While there are inconsistencies in national data, estimates suggest that school participation among children with disabilities never rises above 70%, far below the national average of around 90%. According to a World Bank analysis of India’s 2002 National Sample Survey, children with disabilities are five and a half times more likely to be out of school.

Disaggregation of the data highlights important variations. Almost three-quarters of children with severe impairments are out of school, compared with about 35% to 40% among children with mild or moderate impairments. The most likely to be excluded are children with mental illness (two-thirds of whom never enrol in school) or blindness (over half never enrol).

Public attitudes are among the greatest barriers to equal education for people with disabilities in India. Children with mental impairments face some of the most deeply entrenched prejudices. In a public attitude survey covering the states of Uttar Pradesh and Tamil Nadu, almost half of respondents said such children could not attend either regular or special school. Another commonly held view was that those with mental impairments would not find decent employment. People from households with a disabled member shared the general view, reflecting stigmatization in the home.

Institutional constraints reinforce public attitudes. In 2005, just 18% of India’s schools were accessible to children with disabilities in terms of facilities such as ramps, appropriately designed classrooms and toilets, and transport.

National education policies reflect growing awareness of the problems associated with disability. Measures introduced so far range from providing aids and appliances in schools to stipends for children with disabilities. Public awareness problems have hampered implementation, however. In a survey in Tamil Nadu and Uttar Pradesh, almost three-quarters of households that included a member with a disability reported being unaware of their eligibility for aids and appliances, and only 2% had directly benefited in 2005. Less than half of these households were aware that stipends were available and only 4% had received them.


Giving children with disabilities a level of access and quality of education equivalent to that enjoyed by other children often entails increased financing
HIV and AIDS are principally a global health crisis, but one with profound and wide-ranging consequences for education. As well as threatening lives, keeping children out of school and compromising learning, HIV and AIDS reinforce wider problems arising from poverty and social discrimination, such as economic pressure, orphanhood and stigmatization.

An estimated 33 million people were living with HIV in 2007, two-thirds of them in sub-Saharan Africa. The region is home to 90% of the 2 million children below age 15 living with HIV. Most contracted the virus during pregnancy, birth or breastfeeding – easily preventable forms of HIV transmission [UNAIDS et al., 2008]. Without antiretroviral therapy, about 90% of these children die before reaching school age [Pridmore, 2008]. Those who live may suffer associated problems, such as respiratory infections, malnutrition and diarrhoeal disease, more often and more severely than do healthy children, affecting their capacity to attend school and learn.10

Some of the most devastating effects of HIV and AIDS on education are not reflected in school data, for an obvious reason: many victims do not reach school age. Around 270,000 children under 14 died of AIDS-related illnesses in 2007 [UNAIDS et al., 2008]. In many countries HIV and AIDS are reinforcing deep gender disparities in education. In high-prevalence southern African countries, such as Malawi, South Africa and Swaziland, HIV infection rates for girls and young women aged 15 to 24 are 1.8 times to 5.5 times the rates for men [Stirling et al., 2008]. These disparities can harm girls’ prospects of completing primary school and making the transition to secondary school.

With limited savings and assets, and dependent on physical labour for income, the poorest households are the least equipped to cope with the health costs of HIV and AIDS [UNAIDS et al., 2008]. Many must sacrifice spending in other priority areas, including education. Research in Cambodia found that, to pay for health care, two-thirds of families affected by HIV and AIDS reported spending less on children’s needs, including nutrition – potentially compromising children’s capacity for learning [Alkenbrack et al., 2004]. Household members’ ill health can also compromise education by increasing demand for child labour [Pridmore, 2008].

Becoming an orphan due to AIDS can inflict severe damage on education prospects. Some 15 million children under 18 have lost one or both parents to AIDS. Evidence from fifty-six countries with recent household survey data indicated that orphans who had lost both parents were 12% less likely to attend school than non-orphans, on average [UNAIDS et al., 2008]. Behind this figure are marked variations, some influenced strongly by the gender of the deceased parent. In some sub-Saharan African countries, including Ethiopia, Kenya, Malawi and the United Republic of Tanzania, children whose mothers died were more likely to move to another household and less likely to stay in school [Beegle et al., 2009; Evans and Miguel, 2007; Himaz, 2009; World Bank, 2007c]. While the death of a father

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### Table 3.5: Education indicators by disability status of head of household and wealth, Philippines and Uganda

<table>
<thead>
<tr>
<th>Year</th>
<th>7- to 16-year-olds who have never been to school (%)</th>
<th>17- to 22-year-olds with fewer than 4 years of education (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Average</td>
<td>Disabled*</td>
</tr>
<tr>
<td>Philippines</td>
<td>2000</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>2002</td>
<td>10</td>
</tr>
</tbody>
</table>

* ‘Disabled’ refers to self-reported disability status of the household head.

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10. While access to antiretroviral therapy has risen extremely rapidly over the past few years, increasing the number of HIV-positive children in school and survival rates among their caregivers, in most countries the scale-up rate is insufficient to reach universal access goals by 2010 [UNAIDS, 2009].
in Ethiopia did not significantly affect school enrolment, the death of a mother reduced enrolment among both boys and girls by around 20% and disrupted attendance by enrolled children (Himaz, 2009).

Stigmatization and institutionalized discrimination often reinforce education disadvantages associated with HIV and AIDS. In Thailand, a qualitative study found that those with HIV were denied admission to school, in violation of national laws. Educators expressed concern that other parents would react negatively to the enrolment of HIV-positive students (Save the Children UK, 2006). To some degree, discriminatory school practices hold up a mirror to society. One large household survey in India indicated that 58% of women and 43% of men from households not affected by HIV and AIDS would not send their children to a school with an HIV-positive child (Loudon et al., 2007). The same survey found that stigma was a major reason for dropout. Young children reported losing interest in their studies, becoming depressed and dropping out because of taunts by peers, while adult caregivers reported that stigma and discrimination by teachers were the major educational barrier.

One effect of stigmatization is to force HIV and AIDS underground. In a study examining the educational needs of HIV-positive learners in Namibia and the United Republic of Tanzania, every HIV-positive child interviewed cited experience of the negative consequences of disclosure and emphasized greater safety in silence (UNESCO and EduSector AIDS Response Trust, 2008). Such fears can be well founded. In Brazil and Haiti, teens infected with HIV reported experiencing violence and fighting among their peers in school as a response to their HIV-positive status (Abada-Barrerío and Castro, 2006; Loudon, 2006).

Governments’ failure to respond with sufficient urgency to the threat posed by HIV and AIDS in education is often part of the problem. While there has been an increase in the number of orphaned children able to access school thanks to public policy interventions, much needs to be done. A survey of eighteen national education plans in sub-Saharan Africa that have been developed since 2005 found that just ten had specific strategies for children affected by HIV and AIDS, and that only Ethiopia, Kenya, Namibia and Rwanda included detailed integrated strategies (UNESCO-IIEP, 2009). To failures in policy planning can be added a more widespread failure by political leaders to lead public awareness campaigns aimed at challenging misperceptions and overcoming stigmatization. One policy response to stigmatization has been to protect learners by not identifying their HIV status, but this can have unfortunate results. In Namibia, it has led to an absence of information on how many learners are HIV-positive, and hence a lack of special arrangements or allowances for them (UNESCO and EduSector AIDS Response Trust, 2008).

Conclusion

Identifying the underlying causes of marginalization in education is a step towards the development of policies aimed at equalizing opportunity. Children do not choose the circumstances into which they are born. Yet the wealth of their parents, and their own gender, ethnicity or language can greatly influence their achievement in education and beyond.

This chapter has highlighted the interaction of poverty and social attitudes in creating disadvantages that limit opportunities for education, restrict mobility and perpetuate marginalization. What happens in the education systems is critical because schooling can act either as a great leveller or as a driver of disadvantage. But overcoming marginalization in education requires policies that target wider problems rooted in poverty, stigmatization and unequal power relationships.

There are no policy blueprints. Marginalized people across the world share many experiences in common. By the same token, the circumstances that shape these experiences are highly varied. This is true even within countries. For example, the factors that drive the marginalization in education among pastoralists in northern Kenya are very different than those driving marginalization in Nairobi’s slums. Poverty is a near universal source of extreme disadvantage in education, though poverty does not operate in isolation. The poverty-related disadvantages experienced by young girls or ethnic minorities are reinforced by social attitudes that undermine self-confidence and lower the perceived value of education. These differences matter because successful interventions against marginalization have to tackle specific underlying causes that may be missed by blanket interventions.

The ultimate goal for education policy is to create an environment in which effort and talent, rather than pre-determined circumstances, determine learning achievements and life-chances. The next part of this chapter explores routes for attaining this goal.
Levelling the playing field

Marginalized people are often conspicuous by their absence from national debates on education reform. The implicit assumption of many policymakers is that, as national education systems become more effective, the benefits will eventually trickle down to the most disadvantaged sections of society. That assumption is flawed. Increasing public spending on education, raising average learning standards and strengthening overall accountability are necessary conditions for overcoming marginalization. But they will not be sufficient to break the cycles of marginalization documented in this Report. Reaching the marginalized will take a concerted effort to tackle the interlocking structures of disadvantage that limit opportunity. The diversity of the processes perpetuating marginalization means there are no simple panaceas or blueprints for reform. To the extent that any general conclusion can be drawn, it is that all governments can, and should, do more to put marginalization at the centre of education reform debates.

How can governments break the cycles of educational disadvantage that trap so many children, restricting their opportunities and fuelling marginalization in other areas? This part of the chapter identifies broad clusters of policies:

- **Make education affordable.** Governments in many countries have withdrawn formal school fees, but this is not enough. Indirect costs and informal charges continue to keep school out of reach for millions of children. Eliminating all school fees is a first step towards improving affordability. Incentives covering other costs linked to school attendance can also play a vital role in enabling marginalized children to participate in school.

- **Ensure that schools are accessible.** Distance to school remains a major barrier to education for all. This is especially true for girls because of the security risks associated with long distance from home. Classroom construction can reduce distance and improve physical accessibility to bring schools closer to marginalized people, provided governments target investment with equity in mind. Ensuring that school construction programmes prioritize remote rural areas and urban slums is key. Some marginalized groups – notably pastoralists – have been bypassed as a result of inflexible models of school provision. More flexible models, including multigrade and mobile schools, can open the doors to education.

- **Develop an inclusive learning environment.** All children deserve a good-quality education but typically those who enter school carrying the weight of disadvantage receive the worst. They are often taught by poorly trained teachers, sometimes in a language they do not understand. They often lack textbooks – and when books are available, they frequently include material that depicts negative stereotypes. Governments can address these problems by creating an environment of non-discrimination and equal opportunity. Providing incentives for skilled teachers to work in areas characterized by high levels of marginalization is a starting point. Supporting intercultural and bilingual education can strengthen achievement among disadvantaged ethnic minorities. Ensuring that teachers and schools are equipped to support children with disabilities is also important for inclusive education. Channelling extra resources and pedagogical support to ‘failing’ schools can benefit areas of greatest need.

- **Rights and redistribution matter.** Translating the human right to education into concrete entitlements requires action at many levels. National laws can prohibit formal discrimination and create an environment enabling greater equity. Laws are most effective when linked to political mobilization and the development of broad-based alliances to advance Education for All. In addition, governments and donors need to strengthen social protection measures, using cash transfers and risk-management interventions such as employment programmes to build the resilience of vulnerable households. National budgets can play a vital role in equalizing educational opportunities between richer and poorer people and regions. Redistributive public spending can help to narrow gaps. Conversely, failure to prioritize equity in national budgets can reinforce existing disparities.

- **‘Joined-up’ national strategies.** Marginalization in education is the result of interlocking deprivation. Breaking down disadvantage requires simultaneous public action across a broad front, with education interventions integrated into wider policies for social inclusion, including strategies...
for tackling social and cultural discrimination, and poor nutrition. In many countries progress towards more inclusive education is being held back by piecemeal, under-resourced and fragmented policy planning.

This part of the chapter starts by setting out the framework for understanding the levels of intervention required to combat marginalization. It identifies three broad layers explored in the subsequent sections: policies for improving access and affordability; the learning environment and factors influencing education quality; and the broader enabling environment for tackling marginalization in education, including poverty reduction measures and legal entitlements. The conclusion highlights the importance of joining up all aspects of these policy approaches into an integrated framework for tackling marginalization.

The analytical framework

Consider the experience of five primary school age children who are all out of school. One is a Hmong girl living in a remote hill region of the Lao People’s Democratic Republic. The nearest school is a two-hour walk away and classes are taught in Lao, a language she does not understand. The second child lives a few metres from a public school under a sackcloth tent in Manila. He spends his day collecting and selling rubbish to buy food for himself and his siblings. The third is a young girl in northern Nigeria who has a brother in school but has dropped out herself because she is about to be married. The fourth, a Masai boy from Wajir in northern Kenya, tends cattle during a long trek to grazing land. In a small Brazilian town, the fifth child, who has a severe hearing impairment, does not go to school even though there are several nearby. Local teachers lack training to teach a deaf child and her parents cannot afford a hearing aid.

Each of these children experiences marginalization in education. Yet the underlying causes vary. Distance to school, the language of instruction, child labour and the affordability of education, discrimination and low expectations, and traditional cultural practices and beliefs all play a role. Disentangling the forces behind marginalization is vital, for obvious reasons. Raising teaching standards in schools in Manila will not help children excluded from those schools by poverty and child labour. Increasing the overall education budget in northern Nigeria’s Kano state may not deliver the intended results if half the state’s children – the female half – face restricted opportunities because of the lower value attached to their schooling by parents or practices such as early marriage. Building a new school in Wajir will not necessarily help educate the children of Masai communities whose livelihoods depend on being mobile.

One way of thinking about marginalization is to identify some of the key ingredients for overcoming it. Figure 3.29 presents these ingredients in a schematic outline.

- **Accessibility and affordability.** Proximity of schools to communities is an obvious condition for participation in education, especially for young girls, as gender disparities in many countries widen with distance. Schools also need to be affordable. Just as poverty can leave people hungry amid plentiful food, so it can lock poor children out of education even when schools are available. Public policy can ensure that children are not disadvantaged by the location or physical accessibility of classrooms or by cost barriers to education.

- **The learning environment.** Most teachers attempt conscientiously to do a good job, often in difficult circumstances. Yet millions of children face restricted opportunities to learn in an appropriate language and millions more are taught by overstretched, undermotivated,

![Figure 3.29: The Inclusive Education Triangle](image-url)
untrained teachers in overcrowded classrooms lacking basic teaching materials. While the problems are often system-wide, it is marginalized children who experience them the most acutely. Strategies to combat marginalization need to ensure that schools serving the poor attract skilled teachers who can teach in an appropriate language with cultural sensitivity, and that sufficient and relevant teaching materials are available.

- **Entitlements and opportunities.** Schools can play an important role in combating marginalization in education and beyond, but there is a limit to what they can do. Mitigating the impact of poverty on education requires measures that increase and stabilize the incomes and food security of poor households. Legal provisions can set standards and equip people with rights that unlock opportunities for education, provided they are enforceable. And public spending can help counteract the disadvantages associated with poverty. In each of these areas, actions by governments can create an enabling environment for greater equity. At the same time, political mobilization by the marginalized, or by civil society more widely, is often a powerful catalyst for change.

Each point of the triangle needs to be viewed in relation to the others. Making primary education accessible and affordable without tackling problems in education policy is clearly not a prescription for combating marginalization. Conversely, raising the average level of learning for the majority while leaving behind a substantial minority is a route to more marginalization. The wider pattern of entitlements and enabling conditions is vital because it shapes the environment in which the abstract ‘human right to education’ is translated into meaningful claims and substantive rights. What ultimately matters is the development of an integrated policy response that addresses the multiple and overlapping structures of disadvantage that restrict opportunities for marginalized learners. One powerful example of such a response at a community level comes from Harlem in New York (Box 3.14).

The lesson that emerges from this section is that schools have the potential to make a great deal of difference to the lives of the marginalized. But the processes that drive marginalization start early in life – long before children enter school. As Chapter 2 makes clear, evidence from developing countries shows that malnutrition before age 2 undermines cognitive development and weakens learning achievement. Evidence from rich countries shows that much of the attainment gap at the end of secondary school is predictable before age 5, and that learning achievement is strongly associated with household wealth and parental education (Blanden and Machin, 2008; Feinstein, 2003). Schools can at best mitigate disadvantages accumulated in early childhood. That is why nutrition, maternal and child health, and early childhood care and education are central to an integrated approach for overcoming marginalization.

### Box 3.14: ‘Tipping points’ in Harlem

Numerous initiatives have attempted to close the racial and social divide in American education, but few have achieved a breakthrough in equal opportunity. The Harlem Children’s Zone Project is different. Begun in 1997, it traces its roots to 1970s community activism. The failure of social programmes to improve education, tackle unemployment and respond to the breakdown in family and community life that came with crack cocaine use and street trading prompted community leaders to explore new avenues.

In contrast to narrowly based ‘school reform’ models, the Harlem Children’s Zone Project recognizes that poverty, gun crime and drugs are part of a wider culture of low expectations and underachievement. The intent of the project is to create a ‘tipping point’ by covering at least 65% of children and their parents living in the blocks where the project operates. It sees this as ‘a threshold beyond which a shift occurs away from destructive patterns and towards constructive goals’ (Harlem Children’s Zone, n.d., p. 3).

An ambitious, integrated ‘pipeline’ model starts before birth with support for maternal health and parenting skills, continues through pre-school to secondary school and college, and encompasses housing, social services and nutrition. The emphasis...
is on quality: kindergartens have one teacher for every four children. But scale is also expanding rapidly. From twenty-four blocks in 1997, by 2007 the Harlem Children’s Zone Project had expanded to ninety-seven blocks with 7,400 children.

Education is one of the core elements. In 2004, three schools dubbed ‘Promise Academies’ were opened with funding from government, philanthropists and charities. Many of the children are from highly marginalized backgrounds: 10% live in homeless shelters or foster care. Management of the schools is geared towards the pupils’ need for intensive support. The learning environment includes an extended school day, after-school teaching and remedial classes at weekends. Efforts have been made to recruit and retain high-quality teachers. The schools provide meals and medical care (many students come from households without health insurance).

Early results have been very promising. Researchers from Harvard University found that students who enrolled in the sixth grade gained more than a full standard deviation in math, and between one-third and one-half of a standard deviation in English Language Arts (ELA), by eighth grade: ‘Taken at face value, these effects are enough to reverse the black-white achievement gap in mathematics (HCZ students outperform the typical white student in New York City and the difference is statistically significant) and reduce it in ELA. Students in the HCZ elementary school gain approximately one and three-quarters of a standard deviation in both math and ELA, closing the racial achievement gap in both subjects’ (Dobbie and Fryer, 2009, p. 3).

Can the project’s achievements be replicated on a national scale? The Obama administration has outlined plans to reproduce it in twenty cities under a programme of ‘Promise Neighborhoods.’ Rolling out such an initiative will require more than copying a ready-made blueprint. The high level of community mobilization and the innovation demonstrated by community leaders over many years cannot be readily duplicated. Moreover, expansion to poor neighbourhoods across America will require large-scale public investment during a period of acute budgetary constraints. But the prize of building on the accomplishment of the Harlem Children’s Zone Project is potentially enormous. The costs of narrowing the deep divides in American education have to be assessed against the wider social, political and economic costs of allowing marginalization to diminish the potential of the country’s children.


In 2007, Faruk’s mother wrote

“I have spent days without having a full meal but never let Faruk think about leaving school.”

Faruk’s mother, Bangladesh
by attaching more weight to rural areas with high concentrations of out-of-school populations (World Bank, 2009).}

Like all parents, those of marginalized children care about the quality of education. If fee abolition leads directly to heavily overcrowded classrooms, shortages of teaching materials and unmotivated teachers, parents may question the real value of ‘low-cost’ education. Evidence from a range of countries that have withdrawn fees shows that sequencing reform is vital (World Bank and UNICEF, 2009). Increasing investment in teacher recruitment and textbook provision in anticipation of rising enrolment is likely to prove more effective than action after the event. Similarly, bringing more marginalized children into school increases the importance of complementary action in other areas, including school-based nutrition programmes (World Bank, 2009).

Fee abolition is only a partial response to wider poverty constraints affecting demand for education. Making schools affordable to parents of the most marginalized children is likely to involve removing or cutting costs for uniforms, textbooks and other materials. In western Kenya, one study based on a randomized experiment found that students receiving a free uniform who did not previously own one were 13 percentage points more likely to attend school. For those who already owned a uniform, the estimated impact was small and insignificant (Holla and Kremer, 2009). Such evidence illustrates the need to look at the overall cost barriers confronting poor households, rather than at user fees in isolation. Experience from a broad group of countries points to the positive effects of measures supplementing the abolition of fees:

- In Nepal, the 2004–2009 education strategy included scaling up a stipend programme targeted at low-caste Dalit children. In 2003, about 384,000 out of 527,000 eligible Dalit children received stipends (World Bank, 2006d). Scholarships and other incentives have also been made available for girls. Another targeted grant provides a cash transfer to children from households in which no member has completed a primary education. Despite some problems in targeting, the programme appears to have helped girls and children from disadvantaged backgrounds into education [Acharya and Luitel, 2006; Research Centre for Educational Innovation and Development, 2003].

- Viet Nam has introduced a range of financial support mechanisms targeting ethnic minority students. However, school costs are still cited as a cause of children dropping out of school. Under Programme 135, a poverty reduction strategy targeting 2,100 communes with very low human development scores, the government provides children attending semi-boarding schools with a monthly stipend. Those who do not live in communes covered by Programme 135 but are poor or live in a ‘commune with extreme difficulties’ receive lower stipends. Everywhere, ethnic minority students receive free textbooks and notebooks (Truong Huyen, 2009).

- Several countries have targeted orphans and other vulnerable children. A programme in Mozambique provides around 3,400 orphans and other vulnerable children with vouchers to buy shoes, clothing and stationery. One study points to positive results for enrolment (Ellis et al., 2009).

Stipends at the secondary school level can be effective in counteracting marginalization in primary education. In some countries, there is evidence that parents unable to meet secondary school costs will withdraw their children from primary school before completion. An innovative programme in Cambodia attempted to forestall that decision. In a pilot scholarship programme supported by the Japan Fund for Poverty Reduction, girls who reached the final grade of primary school were eligible for grants of around $45. The cash was provided to families, conditional on their children attending secondary school. It was estimated that the programme increased enrolment among participants by around 30%. An evaluation found that enrolment effects rose with household poverty. For girls from the poorest 20% of households, enrolment increased by 50%, compared with 15% for girls in the wealthiest two quintiles [Filmer and Schady, 2008; Fiszbein et al., 2009].

The Bangladesh Female Secondary School Stipend Programme has also introduced wider conditions for transfers. It covers school fees and additional payments for girls who stay in school, remain unmarried to age 18 and pass exams. The stipends are credited not just with increasing secondary school enrolment by around twelve percentage points, but also with creating incentives for households to ensure that girls complete primary education [Khandker et al., 2003]. Girls’ primary school enrolment now exceeds that of boys.12

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11. The pilot project, from 2002 to 2005, targeted only girls. A follow-up programme, Cambodian Education Sector Support Project – Scholarships for the Poor, targets both boys and girls with different levels of support. It has also had marked effects on enrolment and attendance (see Annex, p. 294).

12. Another programme in Bangladesh targeting primary school children from poor rural households has been less successful, partly because eligibility criteria have excluded some of the most marginalized children, including many living in slums and informal settlements as well as those attending madrasas and schools run by non-government organizations (Al Samarrai, 2008).
Bringing classrooms closer to marginalized children

Physical access to classrooms remains a major barrier to Education for All. There is no universal benchmark for the appropriate distance to school. One estimate suggests that 2 km, or a thirty-minute walk, should be viewed as an upper limit (Theunynck, 2009). However, much depends on context and circumstance. Where mountains, forests or rivers limit accessibility, even short distances can entail long journey times and high levels of risk.

Increased and more efficient public spending on classroom construction is one way to expand access. Classroom shortages inevitably increase distance to school – and many countries have acute shortages. Low-income countries in sub-Saharan Africa are currently running a deficit of around 1.7 million classrooms. To close that deficit by 2015, the number of classrooms needs to be doubled (EPDC and UNESCO, 2009). Recent estimates for ten sub-Saharan African countries that are off track for the 2015 goals suggest that the number of classrooms is growing at less than half the required rate (Theunynck, 2009).

The location of new schools and classrooms is critical for underserved groups. Too often, classroom construction programmes fail to prioritize areas and groups with greatest need. This is despite the proven benefits of greater equity. In Ethiopia, classroom construction has been a central part of the national strategy to accelerate progress towards universal primary education. Of the 6,000 schools built since 1997, over 85% are in rural areas, significantly reducing average distances to school. The out-of-school population has declined by 3 million and gender disparities have narrowed, underlining the effect of distance on demand for girls’ education (UNESCO, 2008a).

Combining technology and community participation can help education planners identify underserved groups and areas. Some countries, including Ethiopia, have used geographic information systems to generate information on the spatial distribution of schools, their proximity to pupils’ homes and geographic features such as roads, rivers and mountains (Attfield et al., 2002). Communities can supplement this information with local knowledge on the ‘cultural distance’ that gender, social and ethnic factors can create between schools and marginalized people. Such social mapping is often important. Assessments in India’s Rajasthan state in the 1990s found that over 90% of children lived within 1.5 km of a primary school, yet enrolment rates were below 50% because social divisions, including caste, made many parents unwilling to send children to school (Govinda, 1999). This illustrates how social distance can reinforce spatial distance in marginalizing disadvantaged groups.

Children with disabilities – particularly those with visual, physical and severe mental impairments – face obvious disadvantages in negotiating the journey to school and, in many cases, in access to the classroom and other facilities, such as toilets. These disadvantages are reflected in the limited impact of school fee abolition on their enrolment. On one estimate, only one in six Kenyan children with disabilities was attending school after the fee abolition (Mulama, 2004). Difficulties with accessibility cannot readily be separated from wider factors that exclude children with disabilities from school. In many cases, parental concerns over children getting to and into school are compounded by concerns over their experiences in classrooms.

Improving access for children with disabilities requires policy interventions at many levels. Regulations on school design can play an important role in making participation in school possible. Many children with disabilities are effectively excluded from school by the absence of low-cost ramps and appropriate toilet facilities. Getting to school raises wider problems. Public transport systems in many countries are inaccessible to people with disabilities. Sparsely-populated rural areas, where distance to school is the greatest, often have no public transport at all. In urban areas, where the condition of streets often hampers mobility for people with disabilities, the absence of transport effectively prevents many children with disabilities from reaching school. Parental responses to surveys underline the importance of transport. One survey in Bangladesh found that parents of children with disabilities saw the absence of a specialized transport system from home to school in rural areas and the lack of subsidized support for rickshaw transport as major constraints (Ackerman et al., 2005). Education authorities can play a role in addressing access problems through regulations on school design, providing subsidized transport and bringing schools closer to homes.

Some of the most severe classroom shortages are found in areas where conflict has destroyed school infrastructure. After conflict ends, rapid
reconstruction and concerted efforts to get children into school are vital. Rwanda’s government backed a school rehabilitation programme with a strenuous re-enrolment campaign aimed at overcoming parental security fears and rebuilding trust. Although it took four years for enrolment to return to the levels recorded before the 1994 genocide, by 2005 access was above the level that a simple extrapolation of the trend from 1985 to 1992 would have predicted (Obura and Bird, 2009).

**Adapting schools to local contexts**

Understanding local context is critical to developing policies for inclusive education. Many marginalized children live in scattered communities in remote areas where low population density can significantly raise the average cost of providing schools and teachers. Household poverty and livelihood systems can also keep children out of school when families rely on children to tend cattle or help with farm work and domestic chores. Other marginalized children live in slums that are not legally recognized and may face problems linked to household vulnerability. Making schools accessible requires innovative policy responses geared towards specific circumstances.

In many countries, low-population density rural areas are marked by highly concentrated patterns of marginalization in education. Individual villages or groups of villages in regions such as the Andean highlands of Peru and Bolivia may have far fewer, and more widely dispersed, primary school age children than other areas. These children are likely to face longer journeys, with harsh terrain compounding the problem of distance. Attending a school in a ‘neighbouring’ village might involve fording streams and negotiating steep slopes. During the monsoon season in Bangladesh, children living on chars (sand islands in rivers) may have to swim or use banana-leaf rafts to get to school.

Several countries have developed ‘satellite school’ models aimed at addressing such problems. Schools are organized into clusters, usually consisting of a central, relatively well-resourced school and several smaller satellites. The latter may be one–room schools with one person teaching more than one grade in the same class.

In Bolivia, clusters of schools, known as núcleos, have been created to expand the reach of the education system into underserved highland and jungle areas. Each cluster comprises a central school, offering the full cycle of grades up to secondary school, and several satellite schools offering the first three primary grades in multigrade classes. Students and teachers can be redirected to different schools within the cluster to make coverage more even. This system has played a vital role in expanding access to education among indigenous children in highland areas. By providing instruction in Bolivia’s three main indigenous languages, as well as Spanish, núcleos also promote bilingual and intercultural education (Giordano, 2008). The reform helped increase the public education system’s coverage. For instance, in 1992, 82% of urban but only 41% of rural students completed grade 6; by 2001 it was 85% in urban areas and 74% in rural areas (Contreras and Talavera Simoni, 2003).

Satellite systems have to address difficult problems in managing progression through grades. The núcleo system in Bolivia aims to ensure that children complete their basic education at the consolidador, or central school. Another approach is to create satellite schools that provide a full primary cycle, such as those developed for remote rural communities in Burkina Faso (Theunynck, 2009). The advantage of such a system is that it allows for continuity. But does the provision of multigrade teaching across more grades potentially compromise the quality of provision?

That question is an important one. About one-third of all primary school age children in developing countries are now taught in multigrade settings (Little, 2006b). Evidence from some countries suggests multigrade teaching can enhance access without compromising quality. Reviews of the well-established Escuela Nueva, a multigrade system in Colombia, have found higher achievement in Spanish and mathematics than in other primary schools, controlling for other characteristics (Forero-Pineda et al., 2006). Evidence from Burkina Faso, Pakistan and Togo similarly suggests that multigrade classes can perform at least as well as single-grade schools (Little, 2006b). Still, not all multigrade schools are successful and much depends upon the effectiveness of institutional support mechanisms (Little, 2006a).

The Escuela Nueva system and, to a lesser extent, comparable programmes in Chile and Guatemala have been successful partly because they are linked to wider reforms. Research has highlighted the importance of investment in adequately trained teachers to work in a multigrade setting, the
development of curricula and teaching materials that are responsive to student needs and parental concerns, and teaching approaches that encourage students to participate actively in the learning process and to work independently and creatively (McEwan, 2008). Strategies to overcome marginalization need to combine innovative multigrade teaching with support in these key areas.

In pastoral areas, problems posed by low population density are compounded by mobile lifestyles. Improving access to education for pastoralist children requires a break with traditional thinking – and an evidence-based assessment of what works. One such response has been the development of ‘mobile schools’ that follow the community, with teachers delivering instruction at times when children are not herding. Initiatives in both Ethiopia and Kenya experimented with mobile school programmes, supplemented by boarding schools. While these approaches have created new opportunities, they have often lacked a coherent policy framework or sufficient investment of resources (Rose, 2003; Ruto et al., 2009). Some countries are now starting to take a more integrated approach. In northern Kenya, improved political representation of arid areas has gone hand in hand with the development of broad-based strategies to overcome education marginalization. Much will depend upon the level of support, financial and political, that these strategies attract from the central government and upon the success of wider poverty reduction strategies (Box 3.15).

Enforced mobility often comes with vulnerabilities that lead to educational marginalization. Refugees, internally displaced people and children migrating to find work in urban areas are all examples. Most children in slums wage a daily battle for survival that involves long hours working for little income.

Box 3.15: Reaching pastoralists in northern Kenya

Marked by unpredictable rainfall and unreliable food supply, along with cattle rustling and banditry, life for pastoralists in the arid lands of northern Kenya is precarious. The region’s underdevelopment reinforces the daily challenges: only one district town is connected to the national electricity grid. Against this harsh backdrop, the arid lands were hardest hit by a devastating drought and famine that swept the country in 2009, killing entire herds and sending malnutrition soaring. Turkana children had to hike 30 km for water and some Turkana men abandoned their families, unable to face the shame of being unable to feed their children. Ethnic conflict rose over the last remaining pieces of fertile grazing land.

Education reforms have had a limited impact on the lives of pastoralists. In most of the rest of Kenya, fee abolition led to a surge in enrolment, but it made little difference in pastoral areas. In the North Eastern Province, fewer than 40% of children were enrolled in school in 2007, four years after fees were abolished. Pastoralists’ mobile lifestyle and extreme vulnerability mean that reducing the cost of schooling alone was insufficient to enable their children to gain access to education.

To make a difference, an integrated approach to development in the region is needed, along with strategies directly aimed at providing an education relevant to the lives of pastoralists. Such an approach has not been apparent until very recently. Until the late 1990s, the north in general and pastoralists in particular were largely ignored. In education policy, the focus was on persuading pastoralists to abandon their livelihoods and settle in one place where they could more easily be provided with services. This picture has been changing with the emergence of pastoralist civil society organizations and a significant pastoralist group in Parliament – a development that has increased the voice of one of the country’s most marginalized groups. The creation of a Ministry of State for the Development of Northern Kenya and other Arid Lands in April 2008 is one of the boldest statements of the government’s intention to address challenges in the north more proactively.

As part of its strategy to address the development needs of the region, the new ministry was influential in developing a Nomadic Education Policy, drafted in 2008. Innovations include incorporating traditional knowledge in the curriculum, providing grants to mobile schools, establishing feeder schools within local communities, modifying the formal system to suit the nomadic calendar, recruiting teachers (particularly females) from nomadic areas through affirmative action, and using radio and mobile phones for outreach.

The problem is that the new ministry has a broad mandate with an insufficient budget. For 2009/2010, the ministry was allocated a mere 0.5% of the government budget. Without more serious financial backing, there is a real danger that the ministry’s initiatives will fail.

Sources: Gettleman (2009); Ruto et al. (2009); World Bank (2009).
Improving access to education for these children is often difficult, but it is not impossible. The key is to identify the children and ensure that education is provided on a flexible timetable in an accessible environment.

Targeting excluded regions and groups often involves more than the physical presence of a school. Some governments and non-government organizations have used technology in an effort to shrink distances in education. Such technology can complement teacher-student contact by being available at times when children cannot make it to school (whether in the evening or during seasons when they are needed to work) [Cambridge Distance Education Consultancy, 2009]. In China, education authorities have developed a range of distance-learning models, using DVDs and satellite broadcasts to provide teaching to schools in remote rural areas. While the benefits of distance learning in primary school can be compromised by the absence of a teacher, in this case the policy was accompanied by investment in training local teachers. Large-scale evaluations in Gansu and Hubei – among the most deprived provinces in western China, with particularly low literacy rates – found improvements linked to distance learning, with most teachers reporting evidence of student stimulation (McQuaide, 2009).

Providing a second chance to out-of-school children and adolescents

Many marginalized children and youth lack a way back into education. Adolescents who have never attended school or who dropped out early have low levels of literacy and numeracy. Many of the over 71 million adolescents estimated to be out of school are denied a second chance, often because of inflexibility in national education systems. Facilitating re-entry into education is a key strategy for empowering youth and young adults to escape poverty.

Non-government organizations often provide education that is complementary to formal schooling, and can put children and youth on a route back into the formal system. The scale of this provision is not widely recognized. One survey in sub-Saharan Africa recorded 154 programmes in 39 countries reaching 3.5 million children (DeStefano et al., 2006). While the quality of such education is highly variable, the scale of demand demonstrates that complementary education programmes fill an important gap. The more successful programmes combine flexible timing of classes with strong support for learners as well as courses and curricula geared towards relevant skills.

Re-opening the doors to education is a major challenge for education policy. Some programmes focus on building bridges between skills training and employment for marginalized youth and adults. The Jóvenes programmes in Latin America are one example [see Chapter 2]. Over-age children and adolescents who have missed out on primary education have different needs. Accelerated learning programmes have been developed in several countries to provide them with opportunities to cover the primary education curriculum over a shorter period. An important requirement for both types of intervention is that they lead to recognized qualifications, allowing graduates to re-enter the formal school system or to gain meaningful employment. This means programmes run by non-government organizations must be acknowledged by governments and integrated into their national plans.

Such programmes have been beneficial in reaching various marginalized groups, from Bangladeshi nomads and street children [Box 3.16] to people in the most educationally disadvantaged region of Ghana [Box 3.17]. They also play a vital role in post-conflict settings, where a generation of children may have missed out on education. Sierra Leone’s post-conflict reconstruction strategy targeted children aged 10 to 16 through a programme called Complementary Rapid Education for Primary Schools. Although under-resourced, the schools in the programme brought education to thousands of children. These children performed as well as other primary schools in national tests. As a result, many participants transferred to regular primary and secondary schools, and are reported to have continued to do well (Baxter and Bethke, 2008; Johannesen, 2005).

Responding to non-state initiatives

When governments fail to provide marginalized children with an appropriate education, local communities often develop their own schools. How governments respond to such local initiatives can have an important bearing on education opportunities for marginalized groups.

In Zambia, some of the poorest communities set up their own schools after a breakdown in the national education system in the 1990s. In 2006, about one in six basic-level students were attending one of these
REACHING THE MARGINALIZED

Levelling the playing field

Bangladesh has made rapid but uneven progress towards universal primary education. Previously deep gender inequalities have been eliminated in primary education and rural areas have been catching up with urban areas. Enrolment among children living in extreme poverty has been less impressive, however, and the marginalization of this group remains a barrier to universal primary education. Initiatives developed by non-government organizations, which reach over 1 million of the country’s most marginalized children, provide powerful evidence that this barrier can be removed.

One example comes from the country’s riverbanks. The 800,000 strong Bede, or River Gypsy, community lives on boats in groups of ten to fifteen families. The Bede, among the poorest people in the country, live off trinket selling, fishing, pearl-diving, snake-catching and traditional healing. These activities involve travel over long distances. Because they are not settled, the Bede have traditionally lacked the residency rights necessary to claim school places. Even when they do have formal rights, their mobility makes it difficult for their children to attend school regularly, so teachers are reluctant to enrol them or provide books.

Since 2006, a national non-government organization, the Gram Bangla Unnayan Committee, has provided education through twenty-one ‘school boats’ that follow the Bede community. Teachers are recruited from the community and given basic training. The boats provide education for two to three years, after which children living with sedentary relatives can gain admission to government primary schools.

Street children are another highly marginalized group. Recognizing the limited success of government efforts to reach these children through formal schooling, non-government organizations opened learning centres as part of the Basic Education for Hard to Reach Urban Working Children programme. In its first phase, the programme trained 346,000 urban working children aged 8 to 14 in basic literacy, numeracy and life skills. They took two-year courses that were equivalent to three years of government primary schooling. Participants were among the most deprived children in the country. One survey revealed that three-quarters of them had never been to school and that 83% of participants’ families earned less than US$2 per day.

Accessibility problems were addressed by locating learning centres near children’s places of work and shortening the school day to two-and-a-half hours. Few children dropped out of the programme. A remaining challenge is to find a way to enable them to enter the formal system.

Sources: Bangladesh Government (2008); Khan and Chakraborty (2008); Maksud and Rasul (2006); Nath (2009); UNICEF (2008a); World Bank (2008d).

Northern Ghana faces some of the country’s most acute educational deprivation. School attendance rates in the region are among the lowest in the country and many children reach adulthood with no more than a few years of education. Parents cite distance to school, cost, seasonal labour demand and, for girls, early marriage as major barriers.

An innovative programme run by non-government organizations is attempting to provide out-of-school children in northern Ghana with a second chance. School for Life offers an intensive nine-month literacy course for children aged 8 to 14, with the aim of preparing them to re-enter primary school. Teaching schedules are designed to accommodate seasonal demands on children’s time. Students are given free books and uniforms are not required, reducing the cost of attendance.

The School for Life curriculum is designed to make education meaningful to rural families who feel that formal schools fail to respect the dignity and strengthen the self-esteem of their children. Students are taught in local languages by locally recruited facilitators, many of them volunteers, who receive in-service training.

School for Life has achieved impressive results. Between 1996 and 2007, it reached around 85,000 children in eight districts, with no discernible gender gap. An evaluation in 2007 found that over 90% of students completed the course, 81% met third-grade literacy and numeracy standards and 65% entered the formal education system. Government data indicate that School for Life graduates entering formal school perform above the average in mathematics and English.

Sources: Casely-Hayford et al. (2007); Hartwell (2006); Mfum-Mensah (2009).
8,000 community schools. These schools play a vital role in providing access to education for children in slums and poor rural areas. Government support is erratic: many community schools are staffed by volunteer teachers and lack teaching materials. Yet scaling up government support could be a cost-effective strategy to combat marginalization in education (de Kemp et al., 2008; DeStefano et al., 2006). To be effective, partnerships between governments and non-state providers serving marginalized groups need to be well-defined, with governments taking responsibility for long-term financing, the provision of teaching materials and the monitoring of quality (Akyeampong, 2009).

In some countries, religious schools fill gaps in government education. Some of these schools reach highly marginalized groups and regions. In Kano state, Nigeria, which has some of the worst education indicators in sub-Saharan Africa, around 2.9 million children and youths aged 6 to 21 attend some kind of Islamic school – roughly twice the combined attendance in government and private schools. About half of these schools are community-owned schools, some of which teach the national curriculum and receive state support. Aid donors sometimes express concern over whether Islamic schools foster ‘anti-Western’ values. Yet these schools reach some of Nigeria’s most deprived children and they are often in part a response to poor quality in the state system (Bano, 2008). Here, too, there is potential for the government to work with non-state actors to extend education opportunities in marginalized areas. Integrating these schools into the government system, and providing support by training teachers and supplying textbooks, would help ensure that their students achieved basic literacy and numeracy skills.

Private schools may also fill gaps in education. There may, however, be adverse consequences for equity (UNESCO, 2008a). In some cases, it can mean that the poorest slum households pay for education while free government schooling is available to those in less poor urban areas. In Kenya, the government has responded by providing capitation grants from the Free Primary Education budget to private schools willing to comply with ministry guidelines. Many schools do not comply. The government could take more responsibility for regulating these schools, but this is a difficult task, given that they often operate under the government radar. A longer-term solution would be for the government to fulfil its commitment to free primary education for all by extending its provision to slum dwellers (Oketch et al., 2008).

**The learning environment**

Governments across the world have signed up in large numbers to the principle of inclusive education. At the core of this idea is a compelling vision, set out in the *Salamanca Statement and Framework for Action on Special Needs Education*, of ‘the need to work towards “schools for all” – institutions which include everybody, celebrate differences, support learning, and respond to individual needs’ (UNESCO and Spain, Ministry of Education and Science, 1994, p. iii). Translating the vision into practice requires creating learning environments that include all children, giving priority to those who are marginalized and excluded.

The learning environment in which children participate is shaped by a vast array of factors. Parental influence, home background, student characteristics, the school and the education system as a whole all play a role. The interaction between these layers and the factors that marginalize children is quite complex. Poverty, gender, ethnicity, minority language and disability do not automatically consign children to a marginalized future, in education or beyond.

Classroom experience, the focus of this section, can help counteract disadvantage but may reinforce it. Schools that give marginalized children access to well-trained and motivated teachers, instruction in a language they are familiar with, a relevant curriculum and adequate teaching materials are powerful vehicles for combating social disadvantage. Many schools lack some or all of these ingredients. All too often, the most marginalized children are taught by the least skilled teachers in the most poorly resourced schools. Tackling this problem requires education systems and political leaders to recognize and respond to the special needs and constraints facing children who have been denied opportunities for education.

**Allocating teachers to marginalized areas and schools**

Well-trained teachers can help mitigate the disadvantages of marginalized children. Such children stand to gain the most from high-quality teaching, but are the least likely to receive it. The problem is not restricted to developing countries. In France, teachers in lower secondary schools...
belonging to Zones d’Éducation Prioritaire (ZEPs, or Priority Education Areas) are likely to have less experience than teachers in other schools and teacher turnover is much higher than the national average (Duru-Bellat, 2009). Problems are most acute, however, in poor countries with deprived areas facing acute shortages of skilled teachers.

Recruitment and deployment practices are at the heart of the problem. Many teachers, young women in particular, are understandably reluctant to move to remote areas, especially when they are characterized by high levels of poverty and lack transport, health services and other facilities. Teachers may be similarly reluctant, for career reasons, to serve in what are seen as failing schools. Experienced teachers may use their seniority to get assigned to the smallest classes (often in higher grades), leaving the largest classes, where the marginalized are at particular risk of dropping out, to the least experienced or least qualified teachers.

Changing patterns of recruitment and deployment can help overcome the problems that marginalized children face. As the following examples demonstrate, it is important to encourage people from marginalized communities to become teachers as well as to ensure that the most experienced teachers are allocated to underperforming areas and schools:

- **Recruit teachers from marginalized groups.** Recruiting from marginalized groups can promote positive identities, combat discrimination and ensure that children learn in their own language. But expanding such recruitment is not straightforward. Some countries give ethnic minorities preferential access to teacher training. This approach has achieved some success in Cambodia, which waives the grade 12 entry requirement for candidates from areas where upper secondary education is unavailable. Increasing the pool of teachers from ethnic minorities has been found to have benefits in terms of their understanding of the local culture and motivation to stay in remote areas, as well as ensuring they are able to teach effectively in the vernacular language (Benveniste et al., 2007).

- **Ensure that teachers are deployed to the schools where they are most needed.** Uneven distribution of teachers can result in shortages, particularly of qualified teachers, in the most disadvantaged regions and schools. Even in countries that allocate teachers on the basis of student numbers, teachers can find ways to avoid difficult postings. In Indonesia, which uses a national formula for teacher deployment, there are marked inequities across schools and districts. For instance, 68% of urban primary schools have too many teachers, while 66% of remote primary schools have shortages (World Bank, 2008f). Some governments have adopted strategies and rules aimed at achieving more equitable distribution:

  - Better access to and use of data on pupil/teacher ratios in the Philippines has helped reduce disparities in teacher deployment. Using a ‘rainbow spectrum’ to make disparities visible, districts are colour-coded according to pupil/teacher ratios. Making the information readily available and easily understandable has led to better channelling of new teaching positions to shortage areas and systematic transfer of vacant teaching positions from surplus to shortage areas. As a result, all 7,237 new teaching posts created in 2006 were allocated to red or black zone schools, namely those most in need (World Bank, 2006e; UNESCO, 2007).

  - In Eritrea, many teachers start their careers as part of their national service, which facilitates enforcement of deployment rules. Teachers are allocated at the national level to one of the country’s six regions, then to schools within the region. They have no choice of location. This has resulted in a more even distribution of teachers. Average pupil/teacher ratios range from 30:1 to 53:1, with the most rural regions having the lowest ratios. However, the least experienced teachers are allocated to the most challenging schools (Mulkeen, 2009).

- **Provide financial incentives.** More equitable rules for teacher deployment may not be enough. Financial and other incentives – such as hardship or travel allowances, subsidized housing, study leave and training opportunities – are often required to encourage teachers to go to demanding schools or to areas with difficult living conditions. Incentives need to be high enough to attract good teachers. Evidence from several countries shows that the incentives offered for teaching in marginalized areas are often too limited to have much effect (Kelleher, 2008; Mulkeen, 2009; Mulkeen and Chen, 2008; UNESCO, 2008a). In Bolivia, teachers receive...
Extra pay for teaching bilingual students and working in rural areas, but on average the bilingual bonus is 0.3% of annual salary and the rural bonus 1.1% (Vegas and Umansky, 2005). Such low incentives are unlikely to deliver results. Ultimately, inducements for relocation have to be seen by well-trained and experienced teachers as adequate compensation for transfer. The more successful examples include the following:

- In the Gambia, a special allowance was introduced in 2006 to attract and retain teachers in schools more than 3 km from a main road. The allowance represents 30% to 40% of average salary. By 2007, 24% of teachers in several regions had requested transfers to hardship posts, with negligible numbers requesting transfers in the opposite direction (Mulkeen, 2009).

- In Mozambique, bonuses are aimed at attracting the most experienced teachers to remote areas. Schools are placed into four categories, from urban to the most isolated, and teachers are paid a bonus depending on school location and their qualifications. Bonuses effectively double the salary of the most qualified teachers; the least qualified receive no bonus (Mulkeen and Chen, 2008).

- In Uganda, a recent study on teacher attrition found housing to be a key factor in assuring retention, especially in rural areas. The government responded by allocating a grant for the construction of teacher housing in 2005 (Mulkeen and Chen, 2008).

- Several Latin American countries have introduced incentive packages including career development to encourage teachers to work in remote areas. For example, teachers living in isolated areas of Ecuador get not only a bonus but also priority in being granted tenure. The incentives have helped reduce disparities in pupil/teacher ratios, but have also tended to attract the least experienced teachers to remote areas (Mpokosa and Ndaruhutse, 2008).

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Train teachers to address marginalization. Beyond recruitment and deployment, teachers need the skills to address marginalization in the classroom. Brazil’s FUNDEP programme devoted 60% of its resources to recruiting and training more teachers in poorer states. Qualified teachers helped students to avoid grade repetition and dropout, and possibly also to enter the first grade on time (Vegas, 2007).

Even experienced teachers need training to challenge attitudes to the marginalized and to equip them to teach effectively in classrooms with children from a diversity of backgrounds. This rarely happens, however; when it does, the initiative often comes from non-state groups, reflecting inability or lack of interest on the part of governments. In some cases, partnerships between state and non-state actors have emerged. In the Amazonian region of Peru, the Programa de Formación de Maestros Bilingües de la Amazonía Peruana, a teacher-training programme co-directed by the Ministry of Education and an indigenous organization, led to non-indigenous and indigenous experts cooperating to train bilingual teachers and familiarize them with indigenous culture (López, 2009).

### Ability grouping seldom helps the marginalized

Classroom practices often reinforce marginalization. An example is the separation of children into ‘ability’ groups at an early age. Children from disadvantaged backgrounds may be more likely to be assigned to low ability groups, sometimes because of language problems. Once in a low ability group, disadvantaged learners often fall further behind. Evidence from rich countries strongly suggests that grouping children by ability early in the education cycle reduces equity and can lead to weaker overall results (Duru-Bellat, 2009; Lleras and Rangel, 2009). Research using data from the Early Childhood Longitudinal Study in the United States shows that, among African-American and Hispanic students, reading achievement gains made in the first grade are lower for students who are assigned to low-ability groups than for students with similar characteristics who are taught in non-grouped classes (Lleras and Rangel, 2009). Similarly, research in France shows that studying in a mixed-ability class helps weaker students and that removing streaming has a strong equalizing impact on achievement (Duru-Bellat, 2009).

Tracking, or separating children into different types of school (such as vocational versus general education) according to academic ability at the secondary level, also has adverse consequences. A study based on data from the TIMSS, PIRLS and PISA assessments, covering forty-five mostly OECD countries, finds that the effect of early tracking accounts for one-quarter of the ‘equality gap’ between the most inequitable and most equitable country, and is also associated with lower mean
performance (Hanushek and Wößmann, 2006). In Germany, early tracking seems to be a factor behind the country’s large education inequalities and particularly the marginalization of Turkish youth (Crul, 2007). Recognizing the equity implications of tracking, many European countries adopted a unified secondary school system in the 1960s and 1970s. There is evidence that the move weakened the link between family background and educational attainment, with associated benefits for those who would have been sent to the lower tracks (Brunello and Checchi, 2007).

The effects of academic segregation and tracking are widely debated. Evidence from developing countries is both fragmented and limited. However, there are strong equity grounds for planners in rich and poor countries alike to avoid early tracking and to treat academic selection within schools with caution. Both can reinforce exclusion.

**Targeting financial and pedagogical support to disadvantaged schools**

One way of targeting marginalized children is to target their schools. Targeting criteria can include location, ethnolinguistic composition or the share of poorly performing students, with governments using a range of regulatory instruments and financial mechanisms to raise standards. More intensive support to teachers and school heads, more specialized pedagogical support to students and more per student financing are among the options. One targeted programme in Uruguay is credited with improving learning outcomes in the last grade of primary school by combining financial and pedagogical support (Cerdan-Infantes and Vermeersch, 2007; Crouch and Winkler, 2008). In Chile, the 900 Schools Programme provided intensive support to the worst-performing 10% of elementary schools by training teachers, gearing courses to students lagging behind or with behavioural problems and providing textbooks. Evaluations have shown that grade 4 test scores improved significantly for students in the programme, mainly as a result of the introduction of more appropriate pedagogical practices in the classroom and facilitation of a cooperative environment within schools (García-Huidobro, 2006).

Not all school-based targeting has produced such positive results. For almost three decades French governments have given additional support to Zones d’Éducation Prioritaire serving disadvantaged students. In 2008, around 16% of secondary school students were in schools with ZEP status. These schools have more teachers, so class size is lower and students receive additional support. In addition, ZEP teachers receive higher pay. Yet several studies have found only a limited impact on student achievement (Duru-Bellat, 2009). Why have ZEP schools not achieved better results? One reason is that the additional resources are spread too thinly over a large number of schools, so class size is reduced by only two students on average. Schools have also had trouble attracting experienced teachers (Moisan, 2001). High teacher turnover makes it difficult to organize strategies that could improve achievement (Duru-Bellat, 2009). A comparable programme in England (United Kingdom), Excellence in Cities, produced more positive results, yet it too fell short of expectations (Box 3.18).

Experience from programmes targeting disadvantaged schools shows that they can make a difference provided the level of additional financing is sufficient and they are accompanied by incentives to attract and retain qualified teachers.

**Learning in an appropriate language and through a relevant curriculum**

Inclusive education for ethnic and linguistic minorities requires schools that offer a relevant curriculum in an appropriate language. Sitting in a primary school classroom listening to a teacher providing instruction in a language they do not understand is a short route to marginalization. Bilingual education facilitates learning in a familiar language and equips students with the national language skills they need to make the transition to secondary school and, eventually, to employment and full participation in social and political life (Aidou et al., 2006; Dutcher, 2004; UNESCO Bangkok, 2008).

Evidence from several countries in sub-Saharan Africa demonstrates that bilingual education can improve learning achievement. One example comes from the Écoles Bilingues created in Burkina Faso in the mid-1990s. After five years of instruction in local language and French, 85% of pupils in these schools successfully passed the primary school examination in 2002, compared with a national average of 62% (Aidou et al., 2006). In Zambia, the successful introduction on a pilot basis of local language teaching in the late 1990s was followed in 2002 by reforms that introduced seven local languages into primary school education (Aidou et al., 2006; Linehan, 2004). Ethiopia has gone...
further than many countries, seeking to combine mother tongue instruction with Amharic and English in grades 1 to 8. One recent review of learning assessment data concluded that ‘those regions with stronger mother tongue schooling have higher student achievement levels at Grade 8 in all subjects, including English’ (Heugh et al., 2006, p. 6). In Mali, bilingual schools have been associated with large declines in dropout and repetition (World Bank, 2005c).

Overcoming underlying causes of marginalization associated with language requires more than bilingual provision. Language is wrapped up with cultural identity and schools have a vital role to play in addressing the social attitudes that devalue some cultures. That is why education reform in some Latin American countries has sought to combine intercultural and bilingual education. In Bolivia, reforms that started in the mid-1990s introduced intercultural and bilingual education on a national scale for the three most widely used indigenous languages. Bilingual teaching expanded rapidly, from 75,896 pupils in 1997 to 192,238 in 2002, or 11% of all primary school pupils (Sichra Regalsky, n.d.). Alongside this change, curriculum reforms led to the development of courses and textbooks that attach more weight to the country’s multicultural history and the role of indigenous peoples.

In other countries, intercultural and bilingual education has suffered from poor design and weak implementation, with intercultural education receiving particularly limited attention. In Peru, which pioneered the approach in the region, it is largely limited to indigenous communities in remote rural areas, and many nominally intercultural and bilingual schools offer no teaching in indigenous languages (Cueto et al., 2009).

Education systems can be instrumental in overcoming marginalization arising from language difficulties. The starting point is to align the rules governing education with broader principles of inclusion. Many countries have not yet done this. In the Lao People’s Democratic Republic, the constitution forbids discrimination between ethnic groups and emphasizes the importance of expanding education in ethnic areas. Yet it also establishes Lao as the official language, including of instruction in school – an arrangement that arguably discriminates against children from the 27% of the population that does not have Lao as the mother tongue (Benveniste et al., 2007). Legal recognition of the entitlement to be taught in a familiar language is an important principle still lacking in many countries.

### Box 3.18: Achieving ‘Excellence in Cities’? A targeted intervention to support deprived urban schools in England (United Kingdom)

England’s Excellence in Cities programme was aimed at improving pupil achievement in deprived urban schools. Introduced on a pilot basis in 1999, it was extended nationally until 2006. The programme reached in particular children from non-white backgrounds, those with English as an additional language, those entitled to free school meals and children identified as having special education needs. Eligible schools received higher than average support per student. In 2005, this amounted to £120 per pupil per year, only 4.4% above the average allocation. Institutional support included four core elements, although specific interventions varied by setting. Local partnerships encouraged schools to work together in developing needs assessments and strategies. Learning Support Units assisted students failing to achieve academically and experiencing behavioural problems. Mentors were provided to children making slow progress in learning. A separate part of the programme sought to identify and support ‘gifted and talented’ children.

Evaluations revealed some positive outcomes. The greatest impact was on mathematics achievement at age 14. Within the most deprived schools, however, the impact was greatest for children previously achieving medium and higher scores. No impact was found for students using support units and students with a mentor at age 14 made less progress than those without. Pupils designated as ‘gifted and talented’ registered higher levels of achievement, but there was no evidence of an Excellence in Cities effect.

One possible explanation why this programme failed to achieve stronger outcomes is that insufficient additional finance was provided. Another factor is that schools in deprived urban areas, including those covered by Excellence in Cities, were finding it increasingly difficult to recruit and retain experienced teachers. More fundamentally, it appears that the initiative failed to override the wider structures of disadvantage in the home and beyond that push children towards educational marginalization.

Sources: Vignoles (2009); Kendall et al. (2005).
Delivering effective bilingual education requires the development of institutional capacity to train bilingual teachers. This is an area in which national targets are often delinked from public spending allocations and a longer-term strategy for change. One reason Ecuador has been able to deliver strong bilingual teaching is that it has established five specialized teacher-training colleges. Similarly, Bolivia has created three indigenous language universities to support bilingual training (López, 2009).

Children often enter classrooms weighed down by low self-esteem and facing low expectations from teachers. Schools can play an important role in changing this situation. Having teachers from a marginalized community can help widen children’s horizons and raise their ambitions. And teachers themselves can be trained to understand the problems faced by ethnic minorities. The Australian Government has set ambitious targets for overcoming disparities between Aboriginal children and the rest of the population. One is to halve the gap in reading, writing and numeracy within a decade. Local initiatives provide pedagogical and curriculum support to address marginalization within the classroom. A pilot programme, Deadly Ways to Learn, has sought to build respect for Aboriginal languages (Box 3.19).

Curriculum reform and intercultural education are not just about reaching the marginalized. They are also about combating marginalization by challenging the stereotypes and the invisibility that sustain it. Textbooks can reinforce gender, racial and ethnic stereotypes that narrow the horizons of many children. Intercultural education has a key role to play in building respect for different cultures, combating prejudice, raising awareness about social inequalities and fostering debate (Luciak, 2006).

**Reaching children with disabilities**

Rules, attitudes and systems that are unresponsive to the needs of children with disabilities often deny these children an opportunity for education. Excluding children with disabilities restricts their choices, making it more likely that they will live their adult lives in poverty, and has wider costs for society. No country can afford an education system that limits the potential of millions of children to contribute to social, cultural and economic life.

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**Box 3.19: Promoting respect for Aboriginal languages in Australia**

Aboriginal children in Australia face language problems at school that had escaped official recognition until recently. The 2006 census indicated that about 11% of the indigenous population aged 5 to 19 speaks an indigenous language at home. The rate rises to 17% in remote Australia and 58% in very remote Australia. The shares are likely to be greater still for Aboriginal English, which many consider a dialect separate from the Standard Australian English taught in primary schools, with a distinctive grammar and vocabulary. While most Aboriginal children enter school speaking English, they often have no idea that their language is different until teachers tell them that it is wrong or inappropriate.

Language problems go beyond the classroom. Aboriginal languages have often been seen as inferior and subjected to ridicule, reflecting wider prejudices about culture, lifestyles and ability to learn. Language problems have often made it difficult for Aboriginal children to understand lessons, absorb information and realize their potential in tests. The result has been a vicious circle of underachievement, with teachers often mistaking a language problem for a learning difficulty.

The Deadly Ways to Learn programme is an attempt to change the ways teachers view Aboriginal languages. It began as a pilot project in fourteen government, private and Catholic schools across rural and urban Western Australia. The name is a play on ‘deadly’, which Aboriginals use in the same way Standard Australian uses ‘great’. The project included the preparation of books such as Deadly Ways to Teach and Talking Deadly to introduce teachers to the culture, identity and history that inform Aboriginal language. Aboriginal education officers provide support and guidance to teachers in the selected schools. Curriculum and textbook reforms are also involved.

The programme highlights the importance of all students in Australia receiving an education that is sensitive to the history, culture and language of indigenous Australians, and that also takes into account the backgrounds of people from other minority groups. Schools have to become more effective in promoting respect, tolerance and multiculturalism, and in combating the prejudices children bring to school.

Source: Biddle and Mackay (2009).
We welcome children with disabilities now because we know that they have the same right to education as the others.

Teacher, Nicaragua

Governments across the world have recognized that inclusive education for people with disabilities is a human rights imperative. The Convention on the Rights of Persons with Disabilities, which came into force in 2008, has strengthened the entitlements and rights of those with disabilities. It requires governments to ensure that people with disabilities have access to an inclusive, quality and free primary education and secondary education on an equal basis with others in the communities in which they live (United Nations, 2008. Article 24, para. 2b). As of September 2009, seventy countries had ratified the convention.

Putting the principles of inclusive education into practice requires action at many levels, starting with information. Most developing countries have poor data on the number of children with disabilities or the incidence of specific impairments. Government estimates are often inconsistent, reflecting not only problems in monitoring and recording but also, in many cases, the invisibility of people with disabilities and the indifference of political leaders (USAID, 2005). Some countries are working actively to strengthen the monitoring of disability. One example comes from the United Republic of Tanzania, where a 2008 survey provided a detailed profile of the prevalence, distribution and pattern of impairments across the country. It found marked regional disparities and a higher incidence of disability in rural areas (United Republic of Tanzania Government, 2009).

Approaches to reaching people with disabilities vary. Many governments, parents and groups representing them continue to view special schools as the most viable option (Lang and Murangira, 2009). One survey in Uganda found that disability groups and parents favoured this approach partly out of concern about overcrowding and poor resourcing in standard schools (Lang and Murangira, 2009). In some cases, children with severe impairments do need education in specialized institutions. However, special schools can reinforce social exclusion, denying children with disabilities the opportunity to interact with their peers who do not have disabilities, reinforcing stereotypes and segmentation in the process.

Integrating children with disabilities into the standard education system is a preferred policy option because it can break down the segregation that reinforces stereotypes. But integration is not a panacea. Children with severe disabilities may require highly specialized support. Moreover, integrating children with disabilities into poorly resourced, overcrowded schools with restricted access to toilets and other facilities is not a prescription for inclusive education, especially when teachers are not equipped to meet their needs. Placing deaf children in schools where none of the teachers can communicate in sign language will do little to alleviate their disadvantages. And very few schools in the poorest countries, or even in middle-income countries, have access to Braille textbooks or teachers able to teach Braille. It is therefore critical that moves towards integration are part of a broader strategy encompassing teacher training, school financing and other measures.

Several countries are developing education systems that are more responsive to the needs of children with disabilities. The Lao People’s Democratic Republic has a network of 539 schools – three for each district in every municipality and province – that teach children with disabilities alongside their peers and provide specialized support. The schools give children with special needs opportunities to learn in an inclusive environment, partly through investment in specialized teacher training. The experience accumulated through the programme is informing wider school reforms (Grimes, 2009). In South Africa, the focus has shifted from special schools to inclusive education in mainstream schools. Authorities have to identify the level of support required by individual learners with disabilities (South Africa Department of Education, 2005; Stofile, 2008). Research in Eastern Cape, one of the poorest provinces, found that inclusive education produced significant gains, ranging from improved physical access to support for specialized teaching practices and increased admission of learners with disabilities (Stofile, 2008).

Non-government organizations have played an important part and in many poor countries are the primary source of education for children with disabilities. Through active engagement with children with disabilities, their parents and education authorities, such groups are producing results that demonstrate what is possible. In 2003, a Bangladeshi non-government organization, BRAC, established a pre-school and primary education programme aimed at increasing participation by children with mild special needs. Training teachers, providing equipment, adapting the curriculum and improving physical access, it had reached about 25,000 children by 2006 (Ryan et al., 2007).
Some non-government organizations and governments, including those of Uganda and the United Republic of Tanzania, have supported ‘itinerant teaching’ approaches, which enable specialized teachers in central primary schools to reach a larger group of pupils in satellite schools, and support and train teachers (Lynch and McCall, 2007).

Several countries are also attempting to build links between existing special institutions and mainstream schools, with the specialized schools providing learning materials and aids, in-service teacher training and support personnel. In Ethiopia, with the support of the non-government organization Handicap International, a school for deaf students operates as both a special school and a resource centre, supporting education for deaf learners in other schools and the development of sign language (Lewis, 2009).

These experiences demonstrate the potential for scaling up local initiatives, but governments need to develop national plans to extend inclusive education for children with disabilities, including detailed targets, strategies for improving access and learning achievement, and comprehensive plans for providing financing and training teachers. The starting point for such a plan is a credible needs assessment based on a national survey of the prevalence of disability.

**Entitlements and opportunities**

Education systems can do a great deal to address the inequalities that restrict opportunity for children from disadvantaged groups. They can make schools more affordable and accessible, create conditions for effective learning, and act as a vehicle for changing attitudes and beliefs that stigmatize children and corrode self-confidence. But prospects for greater equity in education ultimately depend on what happens to children beyond school, through the social and economic structures that perpetuate marginalization.

This section looks at the interaction between education systems and policies in other sectors. It concentrates on two thematic areas. The first concerns the role of laws, norms and rules in empowering marginalized people. Legal instruments, international as well as national, can enhance equity not just by setting standards for public policy, but also by enabling marginalized people to claim entitlements. Political mobilization by the marginalized and other civil society groups is another way of broadening rights-based claims.

The second area is redistributive finance. Many children are marginalized in education because their families are poor and particularly vulnerable to external shocks, such as drought or economic crisis. The geographic and historical factors underlying regional disparities also limit opportunity. In many cases, the poverty and economic differences that lead to marginalization in education are linked to unequal power relationships and to disparities in financing. Redistributive finance can help redress disadvantages associated with poverty and regional inequality. In particular, social protection can be instrumental in making education more affordable and less susceptible to the economic shocks that pull many poor children out of school.

**Enforcing rights and laws**

Concerns with equity and fairness inform ethical debates worldwide, crossing political, religious and moral divides. The United Nations Charter encapsulates those concerns in its commitment to universal human rights. Legal institutions and codes enshrine equity in common law traditions (Kritzer, 2002). And political movements for social justice mobilize around agendas emphasizing equal opportunity, non-discrimination and fair distribution of resources. The combined weight of international human rights agreements, laws and political mobilization can act as a powerful catalyst for overcoming marginalization in education.

The Universal Declaration of Human Rights remains the foundation for international human rights entitlements. The contemporary human rights regime operating under United Nations auspices comprises a broad array of instruments, many of which set standards for rights in education. These instruments collectively form a comprehensive framework for extending opportunities to children facing exclusion or discrimination in education on the basis of gender, race, ethnicity, language or poverty (see Annex, p. 292).

International conventions and wider human rights instruments set norms, define shared principles and establish an institutional framework for advancing broad-based civil, political, social and economic rights. Principles of international law are often embedded in national legal codes and constitutions. Yet more could be done to use international human rights agreements to empower
India now legally requires states to provide free education

the marginalized. Ratification of United Nations conventions often fails to lead to action that helps the marginalized. Part of the problem is that the committees overseeing the conventions have for the most part failed either to hold governments to account or to provide transparent and public assessments of national policies. The Committee on the Rights of Persons with Disabilities, the independent body of experts overseeing the new convention, needs to provide a more robust defence of human rights entitlements.

National legal systems have played a crucial role in addressing equity and marginalization in education. A landmark ruling in the development of civil rights in the United States was the 1954 decision in Brown v. Board of Education. The Supreme Court determined that laws separating children of different races into different schools violated the equal protection clause of the American constitution. The principles applied in this case were subsequently extended to challenge segregation in other areas. Brown thus served as a milestone in the struggle of African-Americans to gain equal civil and political rights.

Recourse to law offers marginalized groups an opportunity to contest discriminatory and inequitable practices. As was the case with Brown, legal rulings can have wider importance because of the general principles they establish. To take one example, the European Court of Human Rights has ruled that the Czech Republic’s treatment of Roma children is not legal because the policies amount to de facto segregation (Box 3.20). In the United States, education campaigners have mounted legal challenges aimed at securing greater equity in the distribution of public finance, along with wider institutional reforms (Box 3.21).

Both instances illustrate the importance of legal entitlements that can be used to hold governments accountable. Many countries' constitutions include the right to free, non-discriminatory education for all, but constitutional principles are not always enforceable. Article 45 of India’s constitution mentions ‘free and compulsory education for all children’ up to 14 years but this ‘directive principle’ could not be enforced in court. The Right of Children to Free and Compulsory Education Act adopted in 2009, however, now legally requires states to provide free education to children aged 6 to 14 and reserves 25% of private primary school places for disadvantaged children (Economic and Political Weekly, 2009; India Ministry of Law and Justice, 2009).

The entitlement to a formal identity is a critical asset for achieving greater equity in education. The Convention on the Rights of the Child requires all signatories to guarantee the formal identity of children through birth registration. Yet UNICEF

Box 3.20: Roma children’s right to education – using the law to challenge the state

The European Court of Human Rights has ruled on several cases in which governments have been accused of violating the education rights of Roma children. Echoing themes raised in Brown v. Board of Education, the court has applied the principle of non-discrimination to cases of segregation.

Roma children across Europe are often assigned to ‘special schools’ with little attention to their education needs. Cultural bias and discrimination by teachers and education authorities is widespread. In D. H. and others v. the Czech Republic the court was asked to pass judgment on a case brought by eighteen Czech nationals of Roma origin living in the Ostrava region of the Czech Republic who had been assigned to schools for children with learning difficulties. Represented by the European Roma Rights Centre, the plaintiffs argued that the assignment was discriminatory and therefore contravened the European Convention on Human Rights. Evidence was presented that 56% of the children enrolled in special schools in Ostrava were Roma, and that half of all Roma children attended such schools compared with less than 2% of non-Roma children.

In 2007 the court ruled that such statistics, although not completely reliable, established a presumption of indirect discrimination. This shifted the burden of proof to the defendant, who failed to show that the difference in treatment had an objective and reasonable justification unrelated to ethnic origin. The court ruled that the assessments through which Roma children were selected for special schools were flawed, notably in failing to consider linguistic and socio-economic conditions.

How successful was the case in addressing Roma marginalization? The trial provided a focal point for Roma and wider human rights groups and the judgment established an important principle, but the European Roma Rights Centre has claimed that the Czech authorities have done little since to address segregation.

Sources: de Beco and Right to Education Project (2009); European Roma Rights Centre (2008).
estimates that 51 million births per year go unregistered (UNICEF, 2007c). The lack of registration means parents and children may not have the documentation they need to claim a place in school, establish an entitlement to stipends or votes, or seek legal redress. Failure to register births can also mean the most marginalized children are bypassed in national statistics, rendering them invisible to policy-makers.

Several governments have demonstrated that registration gaps can be closed. In 2009, Burkina Faso initiated a one-year programme aimed at registering 5 million people, most of them women and children, by providing free birth certificates (Integrated Regional Information Networks, 2009). Furnishing documentation does not have to be expensive. Senegal’s drive to supply modern identity cards to all citizens over 15 is estimated to have cost just US$0.61 per recipient (Levine et al., 2008).

Legal instruments can also make a difference for the millions of young girls every year who face having their education disrupted or terminated by early marriage. By one 2005 estimate, almost half of South Asian females aged 15 to 24 were married before age 18. Poverty, tradition and unequal power relationships between men and women all play a part in early marriage (Levine et al., 2008). These issues have to be addressed on many fronts, but legal prohibition of early marriage, coupled with incentives to keep girls in school and campaigns to change attitudes, can establish norms and a basis for legal recourse.

Wider political mobilization is important

Legal provisions cannot be considered in isolation. Brown v. Board of Education was the culmination of a decade-long struggle by African-Americans and sympathetic whites against segregation and other discriminatory laws. The legal principles that the Supreme Court laid down were a landmark. But it was the civil rights movement that made the ruling such a powerful force for change. Political mobilization, involving the marginalized and wider social movements, has been essential in reforming laws and rules on education.

Political mobilization against marginalization can become part of a wider movement. One striking example comes from Bolivia, whose education system systematically reinforced subordination of indigenous people. The 1994 Education Reform Law helped establish indigenous people’s right to learn in their own language and brought multiculturalism into the curriculum. Education reform in turn played a role in political processes that brought an indigenous political leader to power in 2005. Reforms have seen the strengthening of Indigenous Education Councils, which held their own congresses.

Box 3.21: Recent legal challenges to educational marginalization in the United States

Education groups in the United States have taken to the courts to address a wide range of concerns. The results have been mixed.

- In Campaign for Fiscal Equity, Inc. v. State of New York, plaintiffs claimed the state’s school finance system underfunded the New York City public schools, thereby denying students their constitutional right to the opportunity for a sound basic education. Evidence was presented that areas with high poverty, learners with disabilities and large numbers of students learning English faced special problems. After ten years of proceedings, the courts finally found in favour of the plaintiffs. In 2007, the New York State Legislature enacted the Education Budget and Reform Act, increasing education funding by an unprecedented amount and establishing transparency and accountability measures for the distribution of funds and school finance reform.

- Antoine et al. v. Winner School District. This case involved a class action lawsuit brought by the American Civil Liberties Union on behalf of Native American students in South Dakota. Among other issues, the suit charged that the school district disproportionately targeted Native American students for disciplinary action and maintained an educational environment hostile to Native American families. In 2007, a federal court approved a settlement requiring the district to undertake institutional reforms, including hiring a full-time ombudsperson, nominated by the Native American community, to serve as liaison with the community and work with school officials, especially on disciplinary issues. Authorities also agreed to provide training for teachers on ‘unconscious racial bias and educational equity’, and to include Native American themes in the curriculum.

- Other cases with less positive outcomes include Horne v. Flores, in which the Supreme Court in June 2009 reversed a federal court decision upholding minimum standards and necessary resources for the education of English-language learners in Arizona primary schools, which have a very large population of Latino students.

Sources: Campaign for Fiscal Equity (2009); Child Rights Information Network (2009); Orfield and Gándara (2009).
By helping poor people manage risk, social protection programmes can broaden opportunities in education

in 2004 and have submitted proposals aimed at broadening and strengthening multiculturalism in Bolivia’s schools (Gamboa Rocabado, 2009; Howard, 2009; López, 2009; Luykx and López, 2007).

The Bolivian experience draws attention to a broader feature of the interaction between politics and law in combating marginalization in education. Political mobilization is important because it gives a voice to social groups facing discrimination and stigmatization. In New Zealand, the kōhanga reo language movement provided a social, political and cultural focal point for empowerment of Māori people. Political mobilization has contributed to development of a more multicultural education system, which in turn has extended opportunities for Māori children (Box 3.22). In Bangladesh, a national non-government organization called Nijera Kori (‘We do it ourselves’) has helped landless labourers, primarily women, strengthen their ability to claim rights and entitlements (Chronic Poverty Research Centre, 2008).

Political mobilization can also pose risks. The marginalized are not a homogenous group, and political parties, social movements and non-government organizations take up their problems unequally. In India, the rise of political parties representing low-caste groups in northern states has been described as a ‘silent revolution’ (Jaffrelot, 2003, p. 10). Yet that revolution has done little to address poor schooling for low-caste children, suggesting that political priorities have been in other areas (Mehrotra, 2006). Some highly marginalized groups have a weak voice even within broad-based civil society lobbies seeking improved access to education. The rural poor, ethnic minority women, children with disabilities, slum dwellers and children in conflict zones are groups whose causes have not been widely or effectively taken up.

Social protection: conditional cash transfers and beyond

Household poverty is one of the most potent factors in education marginalization. If a poor family is hit by a disaster such as a drought, a flood, unemployment or a serious illness, it may have no choice but to take children out of school. By helping poor people manage risk without compromising long-term welfare, social protection programmes can also broaden opportunities in education.

Such programmes take many forms. They range from cash transfers to employment-based safety nets and interventions to support nutrition. In addition to reducing destitution, such programmes

Box 3.22: New Zealand’s Māori Renaissance

New Zealand’s kōhanga reo movement has demonstrated what a powerful force indigenous language revitalization can be, not only for education but also for social cohesion.

In the 1970s, the Māori language was on the edge of extinction. A grassroots movement arose to save the language by educating a new generation in total-immersion ‘language nests’ (from which the movement takes its name). Today it is a national institution widely credited with sparking the language’s revival and fuelling a powerful assertion of Māori identity in almost all walks of national life.

The concept is simple. Māori under age 6 get their pre-school education in a community- and family-based environment where only Māori is spoken. They spend their early years surrounded by the culture and values of their people. Kōhanga reo are typically found in church halls, schools and marae, traditional Māori community centres. Like many social movements, this one started small. It was begun in 1981 by the government’s Department of Māori Affairs but grew quickly as a grassroots, mostly volunteer-run movement. Thirteen years later there were 800 kōhanga reo catering for 14,000 children.

With their ethos of self-help and commitment to continuity across generations, kōhanga reo became a source of inspiration for young Māori parents, many of whom could not speak their ancestral language. The movement nurtured a generation of bilingual Māori speakers, with alumni numbers estimated today at 60,000. In 2008, one-quarter of all Māori children enrolled in early childhood programmes were in kōhanga reo.

As graduating Māori speakers turned 5 and started school, they generated demand for Māori immersion schools (kura kaupapa). Today, there are sixty-eight kura kaupapa with 6,000 students. Year 11 Māori students in immersion schools have recorded significantly better achievement rates than their Māori peers in English-medium schools.

Kōhanga reo have not solved the marginalization in education that many Māori children experience. Māori youth are still twice as likely as their non-Māori counterparts to leave school with no qualification. But the movement has played a crucial role in challenging discrimination and forging a more multicultural national identity.

Sources: Te Kōhanga Reo National Trust (2009); New Zealand Ministry of Education (2008a, 2008b).
can create incentives supporting children’s education, health and nutrition. They can be targeted not just at the very poor, but also at the most marginalized groups or regions.

Cash transfer programmes have grown enormously over the past decade. Many of these programmes are conditional on specific behaviour, such as keeping children in school and attending health clinics. In some countries, including Brazil and Mexico, nationwide social assistance programmes transfer between 1% and 2% of national income to targeted households. In other countries, conditional cash transfer programmes are more localized and often project-based. The degree to which education figures in transfer conditionality and support varies. Some social protection programmes provide direct support for education, including stipends, bursaries, fee waivers and funding for transport and books (Grosh et al., 2008), (see previous section). In other cases, the education benefits associated with social protection are incidental, resulting from employment creation, nutrition programmes or other measures that enable households to get through difficult periods.

Comparisons have to be made with some caution because of data constraints, and differences in evaluation methodology and in the programmes themselves. Even so, evaluations of social protection programmes point to wide-ranging positive effects (see Annex, p. 294).

Evaluations of social protection programmes have documented a range of positive effects, albeit with marked variation across countries and groups. In Mexico, Oportunidades has had a significant impact on children making the transition from primary to secondary school, especially in rural areas (Fiszbein et al., 2009). Nicaragua’s Red de Protección Social was targeted at children aged 7 to 13 who had not yet completed grade 4 of primary school. Evaluation results indicated a thirteen percentage point increase in school enrolment, with the extreme poor registering the most marked gains (Villanger, 2008). Employment guarantee programmes have also delivered results, often in contexts marked by deep poverty and acute vulnerability. Ethiopia’s Productive Safety Net Programme is an example. Evaluations suggest that around 15% of cash payments have gone to education, while half of beneficiary households report being able to keep children in school longer as a result of the transfers (Slater et al., 2006) (Box 3.23).

Social protection is not a simple antidote to marginalization. Levels of poverty, financing capacity and institutional factors have a bearing on the type of social protection intervention likely to deliver results in various contexts. The cost and effectiveness of any programme will be shaped by factors such as:

- the scale of transfer;
- terms of the transfer; and
- targeting of beneficiaries.

The scale of transfer. Transfer levels vary considerably. One survey found that transfers ranged from around 8% to 23% of the national poverty line in Latin America and from 5% to 30% in sub-Saharan Africa (Yablonski and O’Donnell, 2009). Large-scale conditional cash transfer programmes in Brazil and Mexico have had a marked effect on poverty partly because the money they provide represents a significant increment in the income of the very poor. Ethiopia’s Productive Safety Net Programme boosts child education and reduces child labour when the transfers to households are sufficiently large.

When it comes to supporting poor and vulnerable children, more is clearly better. But policy-makers also have to consider the marginal benefit of increasing transfers and the potential trade-off between reaching more people and providing larger transfers. In the Cambodia Education Sector Support Project scholarship programme, the 25% of students deemed most at risk of dropping out received US$60 and the group next most at risk US$45. Comparing beneficiaries with non-beneficiaries, an evaluation found that while the US$45 transfer significantly increased the probability of a girl being in school, the additional US$15 had a modest additional effect (Filmer and Schady, 2009). In other words, in this case there were diminishing marginal returns to the investment.

Terms of the transfer. Many social protection programmes provide cash transfers to create incentives for behavioural change. To put it crudely, parents get paid for keeping children in school, taking them to health clinics and presenting them for weighing at nutrition centres. The size of transfer influences the strength of the incentive created by this conditionality. Giving transfers to women can result in a higher share of the money being directed towards children – especially girls – than may be the case when men receive the transfers (Kabeer, 2005).
Well-designed school feeding programmes can provide significant nutritional and educational benefits

Unconditional transfers can also generate strong benefits. In Zambia, a pilot unconditional cash transfer programme supported by German aid involved two districts, Kalomo and Kazungula, marked by large out-of-school populations and high levels of poverty. It resulted in significant declines in absenteeism among children from poor households in Kalomo and an increase in spending on education in both districts (Understanding Children’s Work, 2009). Thus, social protection can have an effect even in countries unable to implement and monitor conditional transfers.

School feeding programmes provide another form of social protection. The World Food Programme estimates that 59 million primary students attend school in a state of malnutrition, with 23 million of them in sub-Saharan Africa alone (World Food Programme, 2009). Well-designed school feeding programmes that include micronutrient fortification and deworming provide significant nutritional benefits. They can increase school attendance and educational achievement (Bundy et al., 2009b; Kristjansson et al., 2007; Miguel and Kremer, 2004). Many programmes incorporate a strong gender dimension by making special provision for girls’ nutrition. One survey in sub-Saharan Africa covering 32 countries and 4,000 primary schools receiving World Food Programme support found that school feeding had marked benefits on school participation (World Food Programme, 2007).

What is less clear is the scale of the benefits and the most effective delivery mechanism. School feeding programmes raise many of the same issues for policy-makers as social protection in other areas. The key to success is equitably and cost-effectively delivering an adequate incentive in terms of the amount of rations provided. There is some evidence that programmes combining take-home

Box 3.23: Ethiopia – Productive Safety Net Programme boosts children’s education

Ethiopia’s Productive Safety Net Programme is the largest social protection programme in sub-Saharan Africa outside South Africa. Launched in January 2005, the Productive Safety Net Programme now provides regular cash or food transfers to more than 7 million people whose food sources are unreliable. It has produced significant benefits for education.

The programme aims to protect highly vulnerable people against shocks and to build their assets. During periods of stress, one adult per household is guaranteed the option of working in an employment programme that provides payment in cash or in kind as food. In effect, the programme is a social insurance mechanism. It offers people a chance to manage risk without having to sell productive assets, cut spending on nutrition or take children out of school. It has benefits affecting education at various levels:

- **Children’s participation in education.** Data for 2006 indicate that about 15% of cash from the programme was used for education purposes. By 2008, spending on education was the most common type of investment of programme resources. Financial support has enabled many families to deal with shocks without taking children out of school. Half of the households interviewed in 2006 reported keeping their children in school longer rather than withdrawing them when cash or food was short; and one-third enrolled more of their children in school. The benefits were strongest in districts where transfers were in cash rather than food.

- **Classroom construction.** The public works component of the programme has included classroom construction and upgrading of schools. In some villages, construction of classrooms has allowed schools to add a grade, enabling pupils to stay on for another year and reducing the attrition associated with transition to more distant schools.

- **Health and nutrition.** Almost a third of recipients spend cash from the programme on health services and the public works component has helped build local clinics. The programme bolsters health and nutrition – receiving a relatively high transfer from the programme reduces the likelihood of low calorific intake by over ten percentage points.

Set against these positive outcomes are some implementation problems. Employment-based support can create incentives for child labour. One study found that about 8% of workers in the programme were under 18. In families facing tight labour constraints, low transfers only partially alleviated resource constraints and in some cases pushed parents into compensating for the transfer of their labour to the programme by increasing demands on young girls. An independent evaluation has concluded that the programme ‘could improve child schooling and reduce child labour provided that the transfers are large enough’ (Hoddinott et al., 2009, p. 21).

Sources: Devereux et al. (2006); Hoddinott (2008); Hoddinott et al. (2009); Sharp et al. (2006); Slater et al. (2006); Woldehanna (2009).
Contrasting evidence from programmes in Burkina Faso underlines the importance of policy design. In 2005/2006, the World Food Programme assumed responsibility for all school feeding in the country’s Sahel region. In some schools it provided lunches to all pupils every school day; in others, girls with 90% attendance received monthly take-home rations of 10 kg of flour. The two models produced different results. While both improved enrolment, take-home rations extended positive nutritional benefits to younger siblings. An evaluation carried out after one year of the programme also found that both approaches increased new enrolment among girls by five to six percentage points, but school lunches did not appear to significantly affect boys’ enrolment. Absenteeism declined on average, but increased among girls in households facing severe labour constraints. The reason: siblings took over the off-farm labour of girls eligible for school feeding, who in turn took on more domestic labour. This resulted in higher enrolment but periodic absenteeism as girls were occasionally pulled out of school for chores in the home (Kazianga et al., 2009).

Incorporating school feeding into wider anti-poverty programmes is also important. In Brazil, a school feeding programme covering 37 million children has been a central part of the Zero Hunger strategy. It appears to have delivered strong results, in part because government agencies work through decentralized procurement structures that are well resourced and regulated (Bundy et al., 2009a). The Mid-Day Meal Scheme in India, which procures food centrally and distributes it through a network of stores, has achieved wide coverage. But while there is some evidence of nutritional benefits during droughts and improved cognitive skills, the impact on enrolment is less clear cut. Moreover, implementation has been uneven, with wide variations in quality of food provided (Bundy et al., 2009a; Singh, 2008).

School feeding programmes have potential to play a greater role in combating marginalization, but problems and limitations have to be recognized. By definition, such programmes do not reach out-of-school children. By targeting schools rather than individuals, they risk providing large transfers to children from high-income homes. In countries lacking cost-effective procurement systems, this can result in a significant diversion of resources away from those in greatest need. More fundamentally, some critics suggest school feeding misses the target, since the primary window of opportunity for addressing malnutrition is during pregnancy and up to age 3 (World Bank, 2006f).

**Targeting of beneficiaries.** Social protection confronts policy-makers with difficult policy choices. Should social transfers be directed to individual households or to districts and regions with high levels of deprivation? Should they have narrow objectives, such as getting children into school, or target specific groups, such as children affected by HIV and AIDS, or have broader objectives and target groups?

There are no simple answers. Much depends on governments’ capabilities and the scale and depth of deprivation. In Mexico, Oportunidades has targeted districts and villages with poor human development indicators, as well as individual households. Results include strong gains in education and decreases in child labour for indigenous children in southern Mexico (Lunde et al., 2009). For countries lacking the information or capacity needed to implement finely tuned targeting strategies, self-selection is an option. Ethiopia’s Productive Safety Net Programme targets vulnerable regions on the basis of rural poverty and drought indicators but participants choose whether or not to work for the income on offer through employment programmes (Sharp et al., 2006).

One potential problem with narrow targeting, in the view of some commentators, is that it can lead to stigmatization. For example, there are concerns that this could happen to people receiving transfers linked to HIV or AIDS status. The Kenyan social transfer programme for orphans and vulnerable children has attempted to address this problem by using wider eligibility indicators linked to poverty, orphanhood and other factors (Lunde et al., 2009).

Child labour is often neglected in poverty reduction strategies (World Bank, 2005a). In a survey of forty-four recent national education plans, only eight identified child labourers as a marginalized group and of these just four mentioned specific strategies to reach them (UNESCO-IIEP, 2009). Mali’s action plan for accelerating progress towards universal primary education mentions child labourers as a vulnerable group, but contains no specific policies (Understanding Children’s Work, 2009).
Social protection provides a mechanism for integrating child labour into wider national poverty reduction efforts. Evidence from Latin America and beyond highlights the potential. Reductions in child work by beneficiaries of conditional cash transfers have been found in Brazil, Cambodia, Ecuador, Mexico and Nicaragua. In Cambodia, the average child receiving a transfer was ten percentage points less likely to work for pay. Reduction of child labour as a result of these programmes is often a by-product of school attendance conditions, or, as in Cambodia, a result of direct transfers for education (Fiszbein et al., 2009).

Programmes could go further to target households whose poverty forces them to rely on child labour – but transfers need to be big enough to compensate for the lost income. Targeting the Ultra Poor, a programme launched in 2002 by the Bangladeshi non-government organization BRAC, includes child labour as one indicator of eligibility. In the programme, carefully targeted ‘ultra poor’ households in rural Bangladesh receive unconditional cash and asset transfers, credit, training and equipment. Income poverty has fallen, nutrition and health have improved, and beneficiaries have increased their access to productive assets. However, the effects on child labour and enrolment have been more muted. As one response, BRAC now includes school enrolment as a monitoring benchmark for graduation from ultra poverty (Sulaiman, 2009). Conditions may also be needed to ensure that children are not kept out of school to take care of livestock assets that the household has been given. At the same time, benefits from the programme need to be sufficient to compensate for lost income from child labour.

**Budgeting against marginalization**

Government budgets are a major policy tool for combating marginalization in education. Reaching the most marginalized often requires higher spending than for wealthier areas, with a redistribution of public finance helping overcome inherited disadvantage. Yet the marginalized often live in regions with little capacity to mobilize finance. Without redistributive fiscal transfers, whole regions and historically disadvantaged groups can be left behind.

Financial decentralization has often widened opportunity gaps. Devolving responsibility for revenue-raising can bring decision-making on financing closer to the communities affected, but it can also widen financing gaps between richer and poorer regions, and between schools within regions (UNESCO, 2008a). In China’s highly decentralized financing system, per student expenditure on junior middle schools is eighteen times higher in Beijing and Shanghai than in the poorest provinces (Dollar and Hofman, 2006).

Governments can seek to direct public spending towards marginalized regions and groups through various mechanisms.

**Mobilizing resources.** Ensuring that excluded groups get a stake in new sources of national wealth is one way to combat marginalization. In practice, this is often a politically fraught exercise because redistribution between subnational bodies involves complex bargaining by central government. The Bolivian Government has introduced several new fiscal transfer mechanisms financed by a Direct Hydrocarbon Tax. Two of these are directly redistributive. The tax finances a cash transfer of around US$50 million to the Juancito Pinto programme. Covering close to 2 million children, it targets districts with high dropout and low attendance. Another social transfer programme provides minimum income support. Together the two programmes represent around 2% of GDP. By far the largest part of the Direct Hydrocarbon Tax revenue takes the form of a block grant to subnational governments. This transfer, estimated in 2009 at US$902 million, or 9% of GDP, is not pro-poor and tends to favour gas-producing departments with relatively low poverty. Thus, the Direct Hydrocarbon Tax has increased overall financing for marginalized children in education, but has done little to narrow financing inequalities. Scaling up the Juancito Pinto programme would strengthen equity by making the tax system more progressive (Gray Molina and Yañez, 2009). Other countries with significant mineral wealth, such as Angola, Nigeria and Peru, could also systematically target transfers to regions of high deprivation in education.

**Prioritizing equity.** Many countries have adopted rules for the transfer of public finance that attach weight to poverty-related factors, including deficits in education (UNESCO, 2008a). One recent example comes from India. Before 2007, equity played only a limited role in determining resource allocation. District population size was the main criterion used in estimating need. A new formula attaches more weight to social indicators, including a district-level Education Development Index. In 2005/2006, the differences in per child allocation between high
and low Education Development Index districts were negligible, but in 2008/2009, districts in the lowest quartile on the index received twice as much per child as those in the highest quartile (Jhingran and Sankar, 2009; Figure 3.30). Brazil provides another illustration of equity-based financing, with the education budget weighted to provide additional support to the poorest states and districts (Box 3.24).

**Targeting regional development.** Education financing can be integrated into financing strategies for regions with high levels of poverty, large ethnic minority populations and geographic disadvantages. The effectiveness of such programmes in narrowing regional disparities depends on the level of redistribution and the overall effect on public spending.

While almost all governments have some redistributive financing mechanisms in place, their effectiveness varies. The United Republic of Tanzania has adopted a needs-based financing formula for education, but it appears to have done little to narrow financing gaps between local government authorities. In fact, recent evidence suggests the gaps may be widening, with damaging consequences for equity in education. For each child aged 7 to 13, the richest thirty local government authorities are allocated twice as much as the poorest thirty. The pupil/teacher ratio is nearly 70:1 in the poorest 20% of authorities and 44:1 in the richest. Such outcomes suggest that underlying inequalities heavily outweigh redistribution. There is a strong relationship between spending per child in each authority and the pass rate at Standard 7 (United Republic of Tanzania Government, 2008; World Bank, 2006).

Budget systems vary in their level of commitment to poverty reduction and the targeting of marginalized areas. Within Kenya’s unitary budget system, a broad range of mechanisms is used to support decentralized spending. The Constituency Development Fund allocates 3.5% of government revenue for national poverty reduction efforts but attaches surprisingly little weight (around 25% in the current formula) to poverty levels, as distinct from the overall population in the district. The national budget also identifies ‘core poverty programmes’ representing around 7% of total planned expenditure. They have played a key role in financing free primary education but have suffered from low levels of disbursement, limited transparency and the inclusion of programmes with weak links to poverty reduction (World Bank, 2009f). One result is that areas and groups identified in this Report as centres of marginalization in education – notably the arid and semi-arid north-eastern areas inhabited mainly by pastoralists – receive insufficient support (World Bank, 2009f). The Kenyan budget framework thus suffers from both a weak commitment to redistribution and poor delivery.

Countries with highly devolved financial systems and deep geographical inequalities face distinctive problems. Poor states and regions have the least capacity to raise the revenue they need to deliver good-quality education. Yet they may be home to large populations facing restricted opportunities for education. Overcoming marginalization is likely to require higher levels of per capita spending on the most disadvantaged areas.

Breaking the circle requires a strong commitment to redistribution through public finance. That commitment has often been lacking, as witnessed...
by the deep and persistent regional inequalities documented at the beginning of this chapter. There are exceptions; in recent years, for instance, Brazil has used transfers from the national budget in an effort to redress financing inequalities in education. It has succeeded in narrowing the gap, though large financing disparities remain (Box 3.24).

**Conclusion**

Most governments claim to have in place a policy framework for combating marginalization in education. Pledges to expand opportunities for education, improve school quality and enhance learning standards for all are a staple part of election campaigns across the world. Unfortunately, the practical policies associated with such pledges are often fragmented and insufficiently coordinated, and they fail to tackle head-on some of the most powerful forces behind marginalization. But accelerated progress towards greater equity is possible.

The building blocks for a concerted drive to combat marginalization are well known. Since the World Education Forum in Dakar in 2000, many developing countries have removed school fees. Primary school enrolment has often increased steeply as a result. Benefits for the marginalized have been most positively pronounced when the withdrawal of fees has been combined with incentives for school attendance by disadvantaged groups – such as young girls and street children – and social protection measures that reduce vulnerability. Some countries have also addressed the problems marginalized learners face in the classroom, deploying qualified teachers to underserved areas, providing additional resources...
Targeted regional support has significantly raised education spending in some of the poorest states. Federal transfers have increased per capita spending in Ceará by 21%, rising to 55% in Maranhão. Very large financing gaps remain, however. Per capita spending in better-off states such as Espírito Santo, Acre and Rio Grande do Sul, and in the city of São Paulo, greatly exceeded spending in the eight states receiving complementary support in 2008 (Table 3.6; Figure 3.31). The upshot is that the states lagging furthest behind in education have the most limited resources for catching up with better-performing states.

The problems do not end with inter-state disparities. Some states, including Rio Grande do Sul and Mato Grosso do Sul, may have high average income and per capita education spending but also very large pockets of education marginalization among children of landless agricultural labourers and small farmers. Similarly, children living in the slums of São Paulo and Rio de Janeiro have some of the most restricted opportunities for education in Brazil. Current approaches to public finance do not systematically address these problems.

The experience of Brazil has wider international relevance. Achieving equity is hampered by the sheer scale of inequality, highlighting the limits to the scope of redistribution through the budget and pointing to a need for structural reforms in other areas.


Figure 3.31: Federal government redistribution leaves large gaps in Brazil

State spending per pupil, including the Fundeb transfer from central government, Brazil, 2008

<table>
<thead>
<tr>
<th>State</th>
<th>Real per pupil</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pará</td>
<td>2500</td>
</tr>
<tr>
<td>Bahia</td>
<td>2000</td>
</tr>
<tr>
<td>Piauí</td>
<td>1500</td>
</tr>
<tr>
<td>Maranhão</td>
<td>1000</td>
</tr>
<tr>
<td>Alagoas</td>
<td>1000</td>
</tr>
<tr>
<td>Pernambuco</td>
<td>1500</td>
</tr>
<tr>
<td>Paraíba</td>
<td>1500</td>
</tr>
<tr>
<td>Amazonas</td>
<td>2000</td>
</tr>
<tr>
<td>National average</td>
<td>2000</td>
</tr>
<tr>
<td>Santa Catarina</td>
<td>2500</td>
</tr>
<tr>
<td>Mato Grosso do Sul</td>
<td>2500</td>
</tr>
<tr>
<td>Rio Grande do Sul</td>
<td>2500</td>
</tr>
<tr>
<td>Espírito Santo</td>
<td>2500</td>
</tr>
<tr>
<td>Acre</td>
<td>2500</td>
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<tr>
<td>São Paulo</td>
<td>2500</td>
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</tbody>
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‘Reaching the marginalized’ does not have to be an empty rhetorical pledge

to ‘failing’ schools, and implementing intercultural and bilingual education programmes. Many governments have also recognized the need to prioritize disadvantaged areas in school construction. While public spending patterns continue to favour wealthier groups and regions in most countries, several countries have acknowledged that levelling the playing field in education requires a commitment to redistributive financing in favour of the marginalized.

Non-government organizations have also demonstrated that progress is possible. They have been instrumental in developing and implementing innovative strategies that reach some of the most marginalized, including street children and pastoralists. These strategies are increasingly being integrated into government systems. One example has been the development of second chance programmes allowing children and youth denied the chance to develop literacy and numeracy skills during their primary school years the opportunity to develop skills for employment, gain qualifications and re-enter the formal education system.

The evidence presented in this chapter demonstrates that ‘reaching the marginalized’ does not have to be an empty rhetorical pledge. There are strategies that work – but they have to cut across the borders of traditional policy-making. More important, they have to be integrated into a coherent policy framework that simultaneously tackles the multiple underlying causes of marginalization. Setting equity-based targets can help to focus policy and ensure that the marginalized figure more prominently in national planning frameworks and poverty reduction strategies.