

Whatever it takes:
getting to school by boat,
Mali



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Chapter 5 Rising to the EFA challenge



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Education for all:
a bilingual and intercultural
school for indigenous children,
Peru



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There is no single blueprint for moving towards greater equity in education. When it comes to tackling marginalization, each country faces a different set of challenges – and it has to meet those challenges in the light of the resources available. Just as marginalization is sustained by unequal power relationships, so policies for combating it have to be rooted in political processes and alliances that challenge these relationships. This chapter consolidates some of the broad good practice lessons that emerge from the Report’s analysis. It then distills these lessons into a ten-point framework for tackling the challenge posed by marginalization and accelerating progress towards the EFA goals.

Overcoming education marginalization

With five years to go to the 2015 target date for many of the key goals set in the Dakar Framework for Action, progress towards the Education for All goals is at a crossroads. Much has been achieved over the past decade. Yet many of the world's poorest countries are not on track to meet the goals set at Dakar. They could be pushed even further off track. With recovery prospects from the global economic crisis remaining uncertain, there is a real danger that progress in education will stall – and in some countries the hard-won gains made since 2000 could be thrown into reverse.

Such an outcome would be an avoidable tragedy. For many countries, serious question marks now hang over the prospect of achieving the ambition defined in Dakar. What is not in question is the potential for effective national and international policies to sustain and even accelerate progress in the years ahead. The threat posed by the fallout from the financial crisis is real – and an effective response is urgently required. An arguably greater threat is the 'business as usual' mindset of many national governments, international financial institutions and parts of the United Nations system. If the world is to make a big push towards the Dakar goals, all these actors have to demonstrate a higher order of political leadership. The 2010 Millennium Development Goals summit provides an opportunity to set a new course.

This Report has emphasized the critical importance of placing marginalization at the core of the Education for All agenda. Reaching the sections of society and the regions that are being left behind is the right thing to do on ethical grounds – and it is the sensible thing to do for governments committed to the Dakar goals. It is the right thing to do because the Education for All goals are for everyone and they are rooted in a commitment to social justice and human rights. And it is sensible because strengthening commitment to equity and inclusion is the most efficient way to accelerate progress towards the 2015 targets. To put it bluntly, the targets will not be reached in many countries unless governments direct their attention – and resources – towards the most disadvantaged sections of society. Reaching those who are being left behind as a result of disparities linked to poverty, gender, ethnicity, language and other

markers of disadvantage should be established as a first order of priority.

Chapter 2 highlighted areas of critical importance for the development of more inclusive education. Among them are:

- a stronger focus on early childhood nutrition, maternal health and more equitable access to pre-school provision of good quality;
- greater clarity on numbers of children out of school, along with the development of monitoring tools enabling more coherent measurement of the key ingredients of universal primary education: timely entry into school, progression through the grades and completion of the cycle;
- a clear commitment to quality and to greater equity in learning achievement;
- development of 'second chance' education options for the millions of adolescents and young adults who have missed out on earlier learning opportunities;
- a strengthening of technical and vocational education to counter youth unemployment and build bridges between school and work;
- renewal of the commitment to combat adult illiteracy through proper resourcing of national programmes;
- a strengthening of the commitment to gender parity and equality in each of the above areas.

Drawing up global blueprints for accelerated progress towards the Education for All goals is ineffectual. Every country faces different challenges, opportunities and constraints, and has to chart its own course through national political processes. However, there are opportunities for learning across countries. As governments face the run-up to 2015, this Report identifies problems that have to be addressed and it draws on evidence from monitoring and the analysis of country experience to identify some broad policy lessons.

A ten-step plan for overcoming marginalization in education emerges from these lessons.

Strengthening commitment to equity and inclusion is the most efficient way to accelerate progress towards the 2015 targets

1 Set equity-based targets for all of the Education for All goals

International development goals such as those adopted at Dakar and the Millennium Development Goals set national targets. Most national education strategies do the same. National average targets are important because they provide valuable benchmarks for measuring progress – but they are not enough. Governments should also set equity-based targets that focus on the marginalized. These targets could be defined in terms of narrowing disparities based on wealth, gender, language and location. National and international reporting on movement towards such targets would help increase the visibility of the marginalized, identify areas of progress and problems, and inform policy choices.

2 Develop data collection systems with a focus on disaggregated statistics to identify marginalized groups and monitor their progress

Monitoring and measurement are critical in combating marginalization. They should be seen as an integral part of strategies aimed at identifying social groups and regions that are being left behind, raising their visibility and identifying what works in terms of policy intervention. Effective monitoring and disaggregated data are also a requirement for assessing progress towards equity-based targets. Too often, national statistical surveys fail to adequately capture the circumstances and conditions of those being left behind, reinforcing their marginalization. Timely data for monitoring equity gaps in learning are even harder to come by.

The Deprivation and Marginalization in Education data set developed for this Report could be used as part of a larger tool kit to strengthen the focus on equity. To inform policy, governments need to invest more in developing national data systems that allow for a more finely tuned understanding of marginalization and its underlying causes. Governments could also use such data to address the equity gap by targeting resources to underperforming schools and areas. It is also important that data are not seen as a stand-alone policy tool. Qualitative research processes that give a voice to disadvantaged groups are critical to developing policies for more inclusive education. When it comes to understanding marginalization, the marginalized themselves are the real experts.

3 Identify the drivers of marginalization for specific groups

Marginalization in education is the product of inherited disadvantage, deeply ingrained social processes, uneven power relationships, unfair economic arrangements – and bad policies. The overall effect of marginalization is to restrict opportunity as a result of circumstances over which children have no control, such as parental wealth, gender, ethnicity and language. However, the factors underlying this effect are enormously varied. Poverty, stigmatization, social discrimination, restricted legal entitlements and weak political representation all play a role – and they combine in different ways in different contexts. The problems faced by slum dwellers are not the same as those faced by the rural poor. And while poverty is a universal source of marginalization in education, the poverty-related disadvantages experienced by young girls, ethnic minorities or children with disabilities are reinforced by social attitudes that undermine self-confidence and lower the perceived value of education. An understanding of these differences is important because, to be successful, interventions against marginalization have to target specific underlying causes that blanket interventions may miss.

4 Adopt an integrated policy approach that addresses interlocking causes of disadvantage, within education and beyond

There is no substitute for political leadership in combating marginalization in education. Governments need to make achieving greater equity a national policy priority – and they need to communicate the wider social and economic benefits of more inclusive education.

The Inclusive Education Triangle developed for the Report identifies three broad areas of reform:

- Governments need to *improve affordability and accessibility* by removing formal and informal fees and providing targeted support to the marginalized. Bringing schools closer to marginalized communities is also vital, especially for gender parity. More flexible approaches to provision, including mobile schools for pastoralists and multigrade teaching in remote areas, could bring education within reach of some of the world’s most marginalized children.

Governments need to use data to target resources to underperforming schools and areas

- Broad-based measures are required to *strengthen the learning environment*. Incentives for more equitable teacher deployment and the development of intercultural and bilingual education are high priorities in improving the relevance of education for marginalized groups and helping overcome social stigmatization. Targeting financial and pedagogical support to schools in the most disadvantaged regions or with large numbers of marginalized children can also make a difference.
- *Expanding entitlements and opportunities* for education also involves enforcing laws against discrimination, providing social protection and redistributing public finance. Governments have an obligation to ensure that national legislation is aligned with human rights principles. However, political mobilization on the part of the marginalized and other sections of society is also critical. The experience of the civil rights movement in the United States, which used political mobilization to drive legal reform, retains a powerful relevance.

None of these elements can be viewed in isolation. Just as marginalization is the product of interlocking disadvantages, so strategies for more inclusive education have to incorporate interlocking measures for empowerment. Even the most effective and equitable policies in education will fail to overcome marginalization unless they are part of a wider strategy for combating poverty and extreme inequality. That is why this Report emphasizes the importance of integrated national policies for social inclusion.

5 Increase resource mobilization and strengthen equity in public spending

Many governments have increased financing for education since 2000 and given greater priority to basic education. This is a welcome trend – but more needs to be done. The Report estimates that low-income countries have the potential to increase spending on basic education by around 0.7% of GDP, or some US\$7 billion. At the same time, budget pressures resulting from the global economic slowdown have increased the importance of equity in public spending. Too often, budget allocation patterns reinforce inequalities in education and beyond, holding back efforts to combat marginalization.

Redistributive public spending is one of the keys to expanded entitlements and opportunities. Most countries have some redistributive element in public finance, but it is typically underdeveloped. The upshot is that wealthier regions tend to enjoy higher levels of financing. It is important for governments to develop financing formulas that prioritize need, ensuring that the poorest regions and groups are targeted for support. The principle of equity in public spending has to go beyond equalizing per capita expenditure. Providing equal opportunity to children living in remote areas and in households experiencing extreme poverty and social discrimination is likely to require higher levels of financing than in wealthier areas with lower levels of social deprivation. Investment in social programmes geared towards disadvantaged areas and groups is also important in redistributive finance, not least because it has the potential to generate high returns for equity in education. There is extensive evidence that cash transfers, social safety nets and wider interventions can mitigate the vulnerability that can lead parents to withdraw children from school during economic shocks, droughts and other crises. Social protection policies, already highly developed in many middle-income countries, could play a far greater role in tackling marginalization in education in the poorest countries.

6 Honour aid donor commitments and convene an Education for All pledging conference

While the performance of individual countries varies, there has been a collective failure on the part of the donor community to back pledges with delivery. Current aid levels fall far short of what is required. Commitments to basic education, already below the level needed to close the Education for All financing gap, fell by around one-fifth in 2007. It is important that 2008 commitments reverse the shortfall and point to a rising trend.

Accelerating progress towards the Education for All goals requires donors to honour the overall aid pledges they made at summits in 2005 and to step up their commitment to education. An immediate priority is the delivery of an additional US\$20 billion in global aid by 2010 to fulfil the 2005 promises. Budget pressure resulting from the financial crisis has created a new layer of uncertainty about the future direction of aid financing in many countries. Donors should follow the example set by the United Kingdom in undertaking to maintain real aid increases at the levels set in pre-crisis budgets.

It is important for governments to develop financing formulas that ensure that the poorest regions and groups are targeted for support

If the Fast Track Initiative is to have a future, fundamental reform is essential

The Education for All financing gap is larger than previously assumed. The global gap is around US\$16 billion annually, with sub-Saharan Africa accounting for around two-thirds of the shortfall. For the forty-six countries surveyed for this Report, aid for basic education will have to increase from around US\$2.7 billion to around US\$16 billion annually.

The global financial crisis has added to the urgency of international action on aid. In many low-income countries, the economic slowdown has created intense fiscal pressure. This pressure could lead to lower public spending on education than was planned in national strategies, or even budget cuts. The result would be to slow, or even reverse, progress in education by undermining investment in teacher recruitment, classroom construction and the development of good learning environments.

With the 2015 target date for achieving the Education for All Goals approaching, it is vital that donors move to close the financing gap. Much of the investment required must be put in place over the next two years if progress is to be accelerated. Given this backdrop, an Education for All pledging conference should be convened by the United Nations Secretary-General in 2010 as part of the wider international strategy for advancing towards the Millennium Development Goals.

7 Improve aid effectiveness, with a strengthened focus on equity and conflict-affected countries

Donors need to strengthen efforts to implement the Paris agenda on aid effectiveness. Despite improvements, aid still often comes with unnecessarily high transaction costs due to poor coordination, failure to use national systems and a preference for working through projects. Such practices not only raise transaction costs but also weaken national capacity and undermine aid effectiveness.

Increased aid needs to be accompanied by a stronger commitment to basic education in low-income countries. While there has been a shift in this direction since Dakar, several donors should review the distribution of their aid budgets across the various levels of education. The financing gaps that remain in basic education call into question the large share of aid directed towards higher education levels by some donors – notably France, Germany and Japan – as well as the practice of counting as

aid spending directed at higher education institutions in the donor country.

Poor countries affected by conflict continue to suffer from donor neglect. Support for these countries is uneven and inconsistent – and many countries are bypassed because they are unable to meet inflexible donor reporting requirements. Opportunities for reconstruction are being lost on a large scale, raising the risk of a return to conflict. Working in conflict-affected states confronts governments with wide-ranging governance challenges. Evidence suggests that these challenges can be met through greater flexibility and innovation, and reduced risk aversion. For example, multidonor trust funds have demonstrated that aid can be scaled up even in the most difficult circumstances.

8 Strengthen the multilateral architecture for aid to education

International aid to education continues to suffer from the weakness of the multilateral framework for cooperation. The current architecture is manifestly unfit for the purpose of accelerating progress towards the 2015 goals. It has conspicuously failed either to increase financial resource mobilization on the required scale or to keep education at the centre of the international development agenda. In contrast to the health sector – where global initiatives have succeeded in expanding financing, developing a broad base of donor support and creating multilateral channels for private sector financing – multilateralism in education remains underdeveloped. Political leadership is at the heart of the problem.

The current Fast Track Initiative (FTI) does not provide a credible foundation for the development of an ambitious multilateral framework. While it has registered some important achievements, the FTI has not emerged as the force for change envisaged at its inception. There is little evidence to suggest that it has mobilized significant increases in bilateral aid. The direct financing provided through its two trust funds – the Catalytic Fund and Education Program Development Fund – has been limited. Moreover, the Catalytic Fund has been characterized by slow disbursement and in some cases it has weakened coordinated donor support for nationally owned policies. Countries affected by conflict have received limited support.

If the FTI is to have a future, fundamental reform is essential. Donors should mobilize the US\$1.2 billion needed to meet expected Catalytic Fund financing requirements, subject to early implementation of reform measures and commitments to improve disbursement rates. Donors need greater confidence that these resources will be spent effectively and that disbursement rates will improve. As a starting point, the FTI should be reconstituted as an independent organization outside the World Bank. Developing countries should have a greater voice in its governance at all levels. The design of FTI reform should draw on the experiences and lessons of the Global Fund to Fight AIDS, Tuberculosis and Malaria, and similar global initiatives. The limitations of such health funds have to be recognized, notably with respect to distortions associated with vertical financing; nevertheless, these initiatives have mobilized new financing, developed a broad base of donor support, engaged the private sector, created windows for innovative financing and galvanized political support. The ambition for education should be set at a similar level, with a reformed FTI operating under a clear mandate to close the Education for All financing gap.

Effective multilateralism in education will require wider institutional changes. The High-Level Group on Education for All, created to oversee progress, shape the global agenda and galvanize international support, has not functioned effectively. Annual cycles of planning and meetings lack strategic focus and typically culminate in the adoption of vague communiqués, with little or no follow-up. There is a strong case for replacing the current arrangement with a leaner, more results-oriented structure. As an immediate priority, the High-Level Group should provide leadership in developing a more ambitious and effective multilateral architecture in education.

9 Integrate provision by non-government organizations within national education systems

Responsibility for achieving the Education for All goals ultimately rests with governments – and it is governments that have to be held accountable for results. However, non-government organizations have spearheaded efforts to provide education opportunities for marginalized groups. Many such organizations deliver education in slums and remote rural areas. They also work directly with child labourers, pastoralists and children with disabilities in a wide variety of settings. And they have been at the forefront of efforts to provide a second chance

to children, youth and adults who were denied an opportunity for education during their primary or early secondary school years. These interventions are most effective when they offer marginalized people a route into meaningful employment or back into formal education – and when they are developed in consultation with the marginalized themselves. Integrating successful interventions by non-government organizations within national education systems can help achieve this level of effectiveness.

10 Expand the entitlements of the marginalized through political and social mobilization

Overcoming marginalization is about more than changing policies. It is also about changing power relationships. Legislative action can be crucial to expanding the entitlements of disadvantaged groups to resources and services, and national laws can establish the principles of non-discrimination and equal opportunity. But legislative action is most effective when accompanied by social and political mobilization. From the civil rights movement in the United States to indigenous peoples’ movements in Latin America and the Māori language movement in New Zealand, civil society groups have been instrumental in forging the alliances and framing the demands that have driven change. One of the lessons of history is that marginalization can only be addressed through processes that empower the marginalized and strengthen their voices in political decision-making.

Civil society organizations have an important role to play at the international level by ensuring that these voices are heard in intergovernmental forums. They also have a responsibility for holding aid donors and governments to account for their pledges at Dakar. The Global Campaign for Education, a broad coalition of non-government organizations, teacher unions and other civil society groups, plays a key role in this area. It has raised the profile of education on the international development agenda, built innovative relationships with a broad constituency and developed communications strategies aimed at reaching a wider audience – the ‘1 Goal’ campaign with FIFA to mark the 2010 football World Cup in South Africa is an example. Looking to the future, it is important that the Global Campaign for Education steps up its efforts to hold United Nations agencies and the World Bank accountable for delivering on their Education for All commitments – and for providing higher levels of performance and leadership. ■

Non-government organizations have been at the forefront of efforts to provide education opportunities for marginalized groups