

# Transforming Policy and Practice for Gender in Education

A Gender Review of the 2010 EFA Global Monitoring Report

WORKING PAPER



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**United Nations Girls' Education Initiative  
(UNGEI)**

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**Transforming Policy and Practice  
for Gender in Education:**  
A Review of the 2010 Education for All Global Monitoring  
Report Using an Equity and Inclusion Lens

**Technical Paper  
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## Contents

|  |    |
|--|----|
| Introduction .....   | 7  |
| 1. Unfinished business from earlier Global Monitoring Reports.....               | 8  |
| 1.1. Key issues identified and carried forward by UNGEI .....                    | 8  |
| 1.2. The 2010 Global Monitoring Report and its response to UNGEI’s concerns..... | 9  |
| 2. Main components of the 2010 Global Monitoring Report .....                    | 9  |
| 2.1. The conceptual framework of the 2010 Global Monitoring Report .....         | 9  |
| 2.2. Progress towards EFA goals .....  | 10 |
| 2.3. The financing of EFA .....  | 19 |
| 2.4. Marginalization as a central theme.....                                     | 21 |
| 2.5. Measuring marginalization in education .....                                | 21 |
| 2.6. Out of the mainstream .....   | 22 |
| 3. The 2010 Global Monitoring Report through an equity and inclusions lens ..... | 23 |
| 3.1. Reflections from ‘critical friends’ .....                                   | 23 |
| 3.2. Expectations for the 2011 Global Monitoring Report .....                    | 26 |
| 3.3. Key recommendations .....   | 26 |

## **List of Abbreviations and Acronyms**

|        |   |
|--------|---|
| DME    | Deprivation and Marginalization in Education    |
| EDI    | Education Development Index                     |
| EFA    | Education for All                               |
| FTI    | EFA Fast Track Initiative                       |
| GPI    | Gender Parity Index                             |
| GMR    | Global Monitoring Report                        |
| IATT   | Inter-Agency Task Team on Education (of UNAIDS) |
| UNAIDS | Joint United Nations Programme on HIV/AIDS      |
| UNGEI  | United Nations Girls' Education Initiative      |
| UPE    | Universal Primary Education                     |

## **Acknowledgements**

Although the initial analysis of the 2010 Global Monitoring Report was undertaken by external consultants Robert Smith and Kathleen Fincham, a joint meeting in December 2009 of the UNGEI Global Action Committee and the UNAIDS Inter-Agency Task Team on Education (IATT) contributed much to the construction of this report. The presentation made to the Working Group on Education for All was also an outcome of the joint meeting, representing the views of a range of contributors from UNGEI and IATT on Education. Cheryl Gregory Faye of UNGEI and Justine Sass of IATT provided detailed critiques of the final paper, and the consultants gratefully acknowledge their inputs.

## Executive summary

The 2010 Global Monitoring Report (GMR) shows marked improvement in its treatment of women's and girls' education. Some earlier concerns of UNGEI remain to be addressed fully, such as the tendency to focus on single issues rather than complex relationships in the struggle to achieve Education for All (EFA).

Six main messages are put forward in the GMR, including the importance of early childhood care and education and the issue of quality in education. The new emphasis on youth and adult skills education and gender parity and equity is to be welcomed.

A broader framework informed by a focus on social exclusion would have improved the Report by allowing it to explore more thoroughly the system-like properties of the components that result in marginalization. The analysis would also benefit from a more nuanced view of inclusion and exclusion. By treating inclusion and exclusion as a simple duality and assuming that exclusion is always necessarily negative, the GMR risks oversimplifying the issue.

The sections of the GMR that analyse progress towards the EFA goals are generally helpful, although the data selected for analysis do not reflect the yearly thematic changes. Overall, the GMR shows that the numbers of children out of school have fallen significantly in most countries, while enrolments have largely risen. Gender gaps have also narrowed, although the percentage of girls out of school has increased in some countries. Adult literacy rates have improved, especially among females.

The GMR notes that, despite progress, much needs to be done. Malnutrition receives much attention as a causal factor in low enrolments and poor rates of progress within schools. The Report also points to a lack of innovative programmes to reach children who are out of school, and it identifies teacher supply as a major challenge.

Governments are failing to address inequities and discrimination, but the GMR itself lacks concrete suggestions on how they might address these policy commitments. Without a sufficiently detailed analysis of existing exclusionary structures and systems, the GMR is unable to indicate how marginalization may be reduced.

Gender parity shows signs of improvement within schools, but parallel changes in the labour market and society at large do not reflect this. The GMR recommends 'second chance' education opportunities and strongly emphasizes the notion of quality in education. Unfortunately, it construes quality as largely a matter of success in achievement testing.

The GMR focuses heavily on the financing of EFA. The role of the donors is seen as crucial and, with a few exceptions, development partners are heavily criticized for failing to live up to their promises. The Report gives the impression that more support from donors, delivered in a more predictable way, is a large part of the solution for

achieving EFA goals by 2015. The EFA Fast Track Initiative (FTI) comes in for heavy criticism in this regard, and the Report devotes an inordinate amount of space to presenting the perceived failures of the Initiative. It is necessary to examine whether the evidence put forward in the Report in fact supports such heavy criticism.

The Report uses standardized instruments – such as the Deprivation and Marginalization in Education tool and the Education Development Index – to measure marginalization. These metrics yield fresh insights into the realities of marginalization in schooling; however, they may also mask some of the complexities.

A major weakness of the 2010 GMR lies in its sketchy treatment of HIV and AIDS. Some eight paragraphs of the Report are devoted to what is labelled a ‘health issue’. Such a brief and restricted treatment seriously underplays a major aspect of deprivation, discrimination and marginalization for millions of AIDS-affected people, among whom women and girls are the most at risk.

Finally, the GMR notes that schools should be the drivers of social change, but it does not deal adequately with marginalization within schools or with the roles of communities and civil society at large. Cultural issues in marginalization are neglected in the GMR, as are ways of mobilizing political will.

In making recommendations, both UNGEI and the UNAIDS Inter-Agency Task Team on Education make a plea for greater emphasis on eliminating gender disparities in education (EFA Goal 5), developing innovative strategies to reach the marginalized, establishing social protection mechanisms to address disadvantage and maintaining financial commitments. A deeper understanding of the issues at hand, however, demands a greater focus on the interaction between gender inequality and poverty, as well as a renewed attention to HIV and AIDS and their impact on education.

# A Review of the 2010 Education for All Global Monitoring Report Using an Equity and Inclusion Lens

## Introduction

This paper analyses attention paid to equity and inclusion issues in the 2010 Education for All Global Monitoring Report (GMR). It has been commissioned by the United Nations Girls' Education Initiative (UNGEI) and the Joint United Nations Programme on HIV/AIDS (UNAIDS) Inter-Agency Task Team (IATT) on Education, and it builds on an ongoing collaboration between these networks to support the integration of equity and inclusion issues in education. This collaboration has sought, in particular, to address the

challenges that some children face in attending and completing schooling – specifically, it has focused on children from poor families, those in remote rural communities, girls, children infected with HIV or affected by AIDS, children with disabilities, working children, children from ethnic or other minority groups and children in countries affected by conflict or natural disaster. From this vantage, gender inequality is a cross-cutting issue that affects all categories of educational disadvantage.

This paper builds on and revisits earlier reviews of past GMRs<sup>1</sup> and monitors progress on recommendations made in those reviews. It examines the ways in which the 2010 GMR addresses marginalization and disadvantage and the solutions it puts forward for achieving more inclusive and equitable systems of schooling. Finally, it presents recommendations for the approach to be taken in future GMRs and, more importantly, considers ways to advance gender equity in education and mitigate the impact of HIV and AIDS on educational access and achievement.

UNGEI and the IATT on Education understand equity and inclusion as follows:

Equity is related to securing all children's rights to, within and through education so they can realise their potential and aspirations. It also involves putting into place the arrangements to achieve these aims.

Inclusion can be defined as in *Guidelines for Inclusion: Ensuring Access to Education for All* (UNESCO, 2005): Inclusion is a process of addressing and responding to the diversity of needs of all learners by increasing participation in learning, cultures and communities, and reducing exclusion within and from education. It involves changes in content, approaches, structures and strategies, with a common vision that covers all children of the appropriate age range and a conviction that it is the responsibility of the regular system to educate all children.

Gender inequality is seen to be a cross-cutting issue that affects all categories of educational disadvantage.

Sources: Wilson, D., *Human Rights: Promoting Gender Equality in and through Education*, Background paper for EFA Global Monitoring Report 2003/4, Paris, UNESCO, 2003. UNESCO, *Guidelines for Inclusion: Ensuring Access to Education for All*, Paris, UNESCO, 2005. See also UNESCO, *Policy Guidelines on Inclusion in Education*, Paris, UNESCO, 2009.

<sup>1</sup> 'Notes from 2008 EFA Global Monitoring Report: A Review of the Main Gender and Inclusion Issues', UNGEI, November 2007, available at <[www.ungei.org/resources/files/UNGEI\\_Analysis\\_of\\_GMR\\_2008-annex.pdf](http://www.ungei.org/resources/files/UNGEI_Analysis_of_GMR_2008-annex.pdf)>.

## 1. Unfinished business from earlier Global Monitoring Reports

### 1.1. Key issues identified and carried forward by UNGEI

For the past two years, UNGEI's Global Advisory Committee has commissioned a technical review of the gender-related issues in the annual GMR. This review has guided the discussion of the Committee meeting and led to the development of pertinent recommendations for the Working Group on EFA, which thereafter feed into the EFA High Level Group.

Before addressing the challenges of this year's GMR and outlining the approach taken in this review, it is necessary to revisit earlier assessments to measure the extent to which the 2010 GMR has addressed earlier concerns and recommendations.

The analysis of the 2009 GMR identified a number of concerns, including:

- The inadequate sex disaggregation of data
- An underemphasis on equity in all its forms
- A great reliance on standard numerical and graphical data, at the expense of qualitative data
- An overemphasis on good governance as the critical factor in getting everyone into school, rather than contextualizing it as one of a number of important and related facilitating factors (this was considered perhaps the greatest weakness)
- Limited attention to the role of communities in achieving EFA targets (still underemphasized in the 2010 report)
- Limited discussion of other issues, including the peculiar problems of fragile states, adjustment of the content of education to reflect the life skills and literacy requirements of women and girls and the provision of dedicated and predictable funding (including 'gendered budgeting')
- An insufficiently 'gendered' discussion of numerous other issues and a top-down approach to problem-solving. According to the 2009 GMR, the failure of donors to meet their commitments led to the US\$7 billion financing gap evident a year ago. The 2010 GMR again focuses on the challenge of financing, and it echoes its predecessor's general conclusion that EFA goals largely remain attainable, although several key targets will not be met by 2015.

The tendency to focus on one factor rather than on interactive processes remains a weakness of GMR design and construction. It could be argued that it is necessary to focus on one significant area rather than to attempt a 'shotgun approach' that equally covers all aspects of the effort to achieve EFA goals. Such an approach might result in diffuse and unwieldy reporting. However, it is essential to keep in mind that the selected area of focus is only one of many competing priorities. UNGEI has long held that the most important unifying and cross-cutting issue is gender; whether the matter at hand is governance, marginalization or conflict-affected countries, the gender lens provides the most significant tool for analysis of progress towards EFA.

UNGEI's main concern for 2009 was that the GMR failed to treat gender issues as dominant or even highly significant. The present analysis was therefore framed with a central question in mind: In addressing equity and inclusion issues, has the 2010 GMR embraced the gender perspective more thoroughly than its predecessor, and can we be confident that this attention to gender will continue and even be extended in the future?

## **1.2. The 2010 Global Monitoring Report and its response to UNGEI's concerns**

It should be stated at the outset that, in general, the 2010 GMR is a great improvement over earlier versions. As its title and focus (*Reaching and Teaching the Most Marginalized*) indicate, it deals with gender issues much more adequately than prior reports.

The authors of the 2010 GMR are to be congratulated on adopting a more thoroughly gendered approach than has been seen previously. The Report puts forward six main messages: the importance of early childhood care and education, continued progress in universal primary education (UPE), youth and adult skills issues, the neglect of literacy, the quality of basic education and, finally, gender parity and equity.<sup>2</sup> This scheme gives unusual prominence to the education of girls and women – the central focus of UNGEI – and marks a major step forward with regard to gender issues.

Nonetheless, the Report still falls considerably short in its treatment of other issues linked to equity and inclusion. This analysis will draw out the challenges that remain in presenting these particular issues.

## **2. Main components of the 2010 Global Monitoring Report**

### **2.1. The conceptual framework of the 2010 Global Monitoring Report**

The GMR's conceptual framework for the terms 'marginalization' and 'disadvantage' deserves further analysis and debate. In the GMR, 'marginalization' is shorthand for a cluster of conditions ranging from gender status to ethnicity and poverty status.

This review argues that adopting 'social exclusion' as a unifying concept would have led to a more refined and nuanced analysis of the challenges facing the EFA movement. Social exclusion as a framework emphasizes the multidimensionality of deprivation and the processes and social relations that underlie it.

The 2010 GMR refers throughout to the system-like properties of marginalization and the interconnectedness of the component parts, but it does not always identify or highlight these characteristics. Just as the 2009 report declared governance to be the key challenge in the EFA process, the 2010 GMR comes across as a plea for treating marginalization as the critical issue in meeting EFA targets.

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<sup>2</sup> Although identified as a main message by the GMR team, EFA Goal 5 (gender parity leading to equity) remained in the background of the 2010 Report, as is discussed further below.

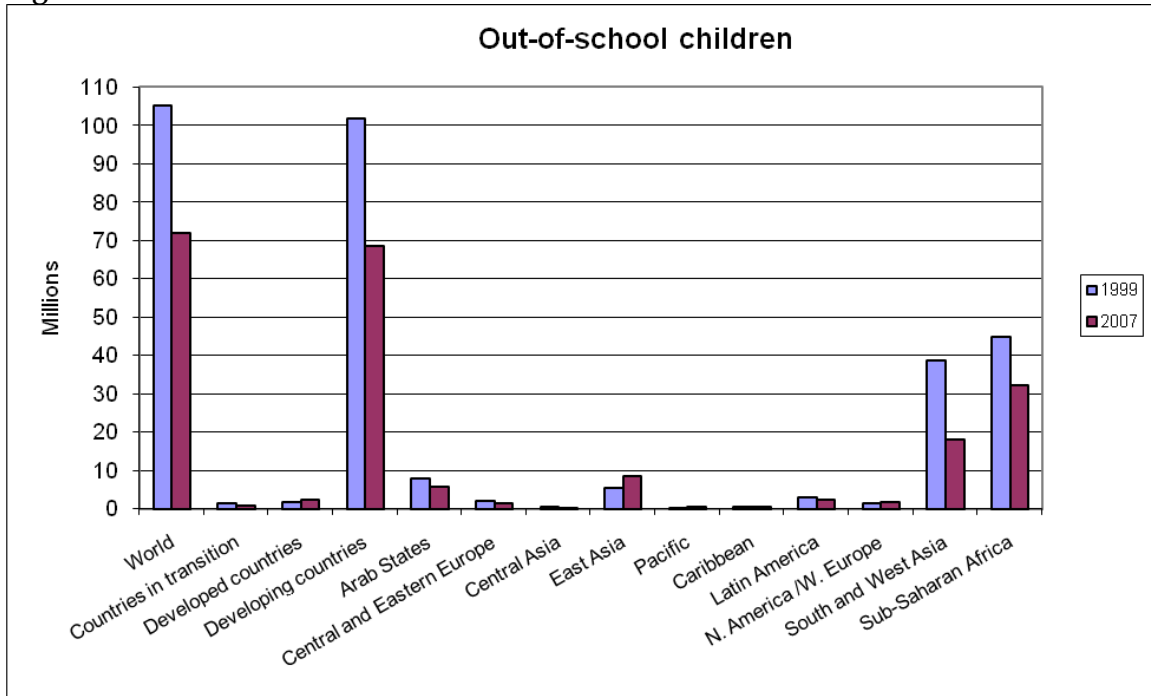
The GMR's treatment of inclusion and exclusion as a straightforward duality also impairs its analysis. It is possible to be excluded from some areas or dimensions but included in others, and inclusion itself can manifest as either privileged inclusion or adverse incorporation. Multidimensionality is inescapable. It should also be noted that marginalization is not by definition negative, nor is inclusion always positive. These nuances are particularly powerful when considering the position of women and girls in a given society. Distinct types and varieties of inclusion and exclusion deserve deeper attention than the GMR can probably afford, but cautionary notes and pointers should be evident in the discussion of the conceptual framework adopted by such an influential document as this.

## **2.2. Progress towards EFA goals**

The figures below give an indication of broad progress towards EFA goals since the last GMR. It should be noted, however, that the statistics mask significant disparities related to wealth, gender, language, the rural-urban divide and ethnicity. Furthermore, despite yearly thematic changes in the GMR, the 2010 version presents the same set of statistical tables as the previous year's report, albeit with new figures. The need for disaggregated and topic-specific data is clear.

Overall, it can be seen from the GMR (see Figure 1) that the number of children out of school has fallen by 33 million since 1999. In South and West Asia the number has halved. Some regions, however, have actually seen an increase in the number of children out of school. This is the case in the Pacific (75 per cent increase), East Asia (50 per cent), North America and Western Europe (36 per cent) and the Caribbean (26 per cent).

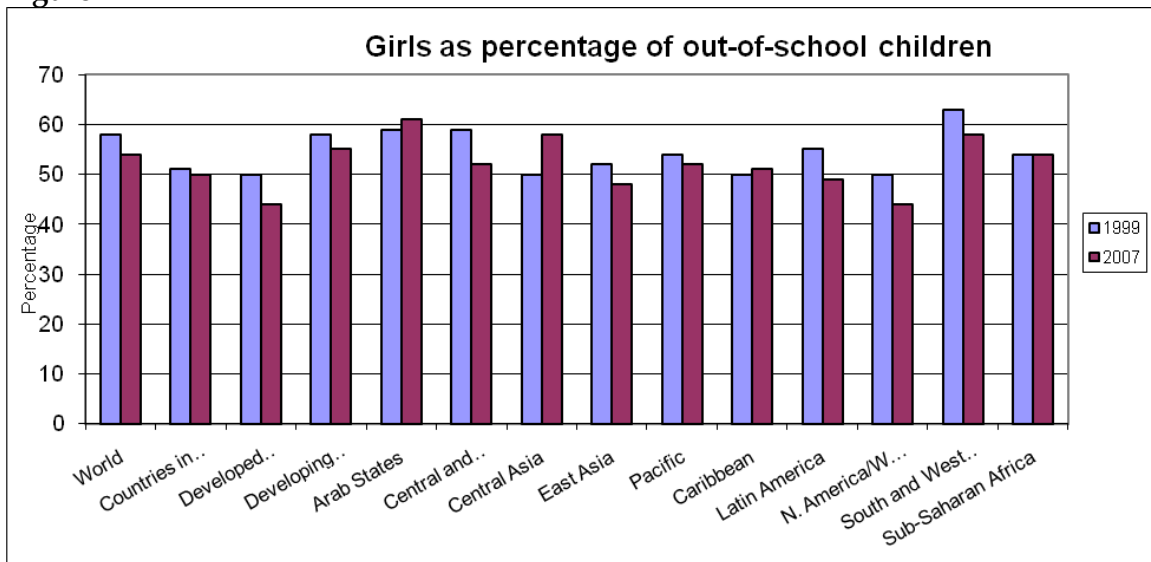
**Figure 1**



(GMR 2010 Statistical Tables Annex: Table 5)

Enrolments have increased dramatically in some countries, and the proportion of girls out of school has been reduced in a context of narrowing gender gaps (see Figure 2). However, the proportion has actually increased in some countries, most significantly in Central Asia (16 per cent increase) and also in the Arab States (3 per cent) and the Caribbean (2 per cent).

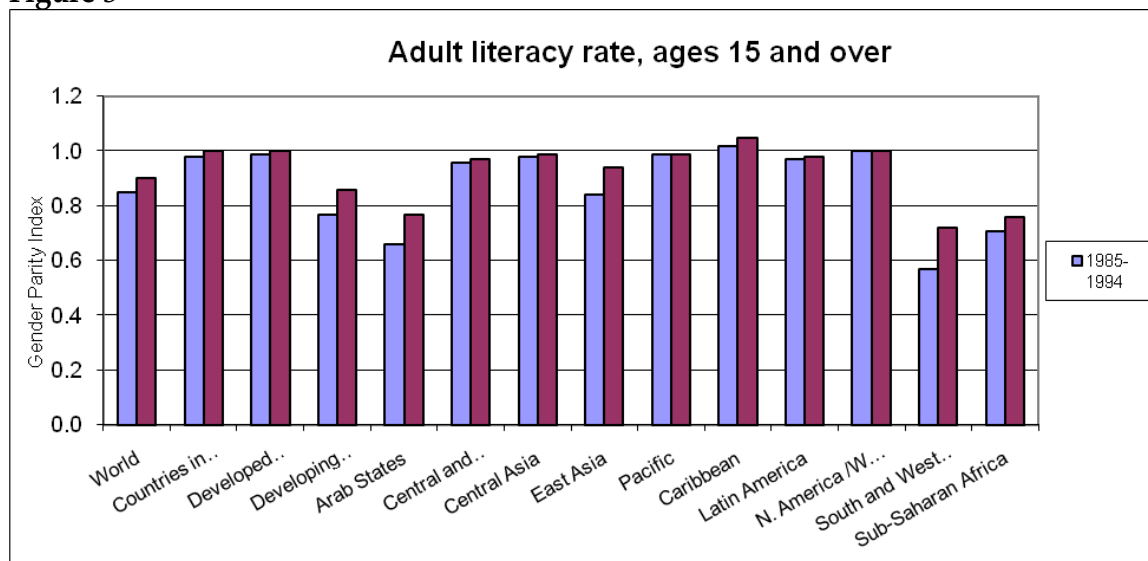
**Figure 2**



(GMR 2010 Statistical Tables Annex: Table 5)

Gender parity in adult literacy has also improved in all regions except the Pacific and North America and Western Europe, where the Gender Parity Index (GPI), or ratio of females to males, for this indicator has remained constant at 0.99 and 1.00, respectively (see Figure 3). Female literacy has grown faster than male literacy.

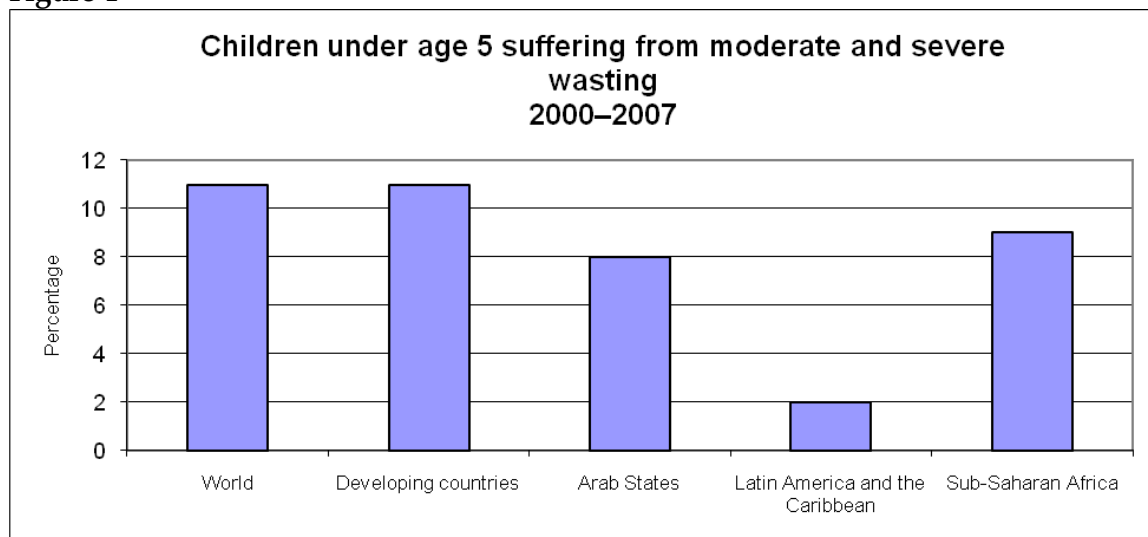
**Figure 3**



(GMR 2010 Statistical Tables Annex: Table 12)

Despite these positive indicators, the GMR notes, much remains to be done. Malnutrition remains a serious impediment to the achievement of EFA in many countries. Figure 4 indicates that 28 per cent of children under the age of 5 in sub-Saharan Africa and 17 per cent in the Arab States are moderately to severely underweight.

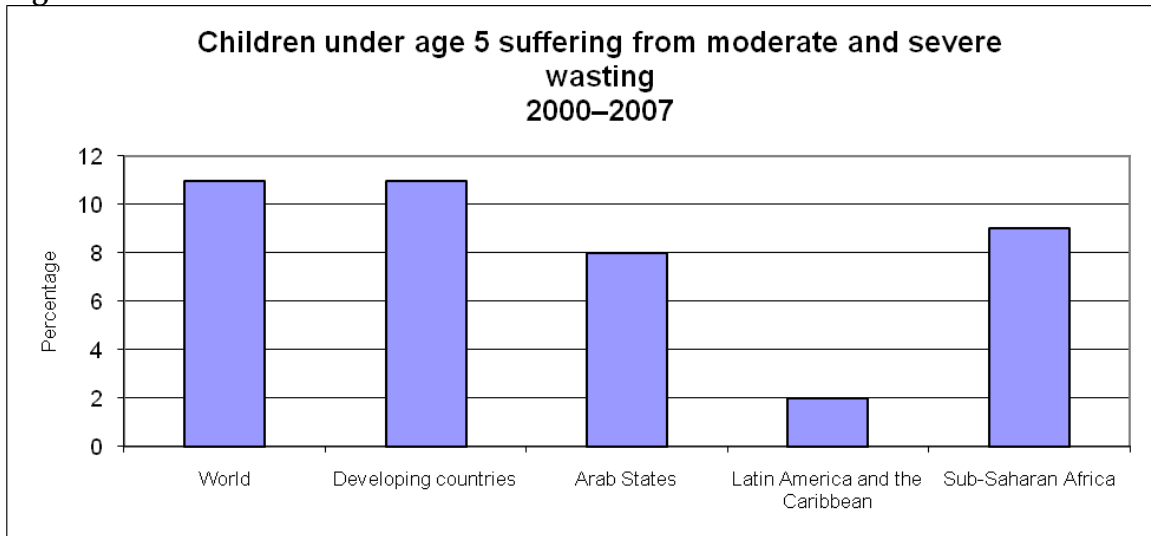
**Figure 4**



(GMR 2010 Statistical Tables Annex: Table 3A)

Moreover, Figure 5 indicates that the same regions also have the greatest number of children under age 5 suffering from moderate to severe stunting (38 per cent in sub-Saharan Africa and 26 per cent in the Arab States).

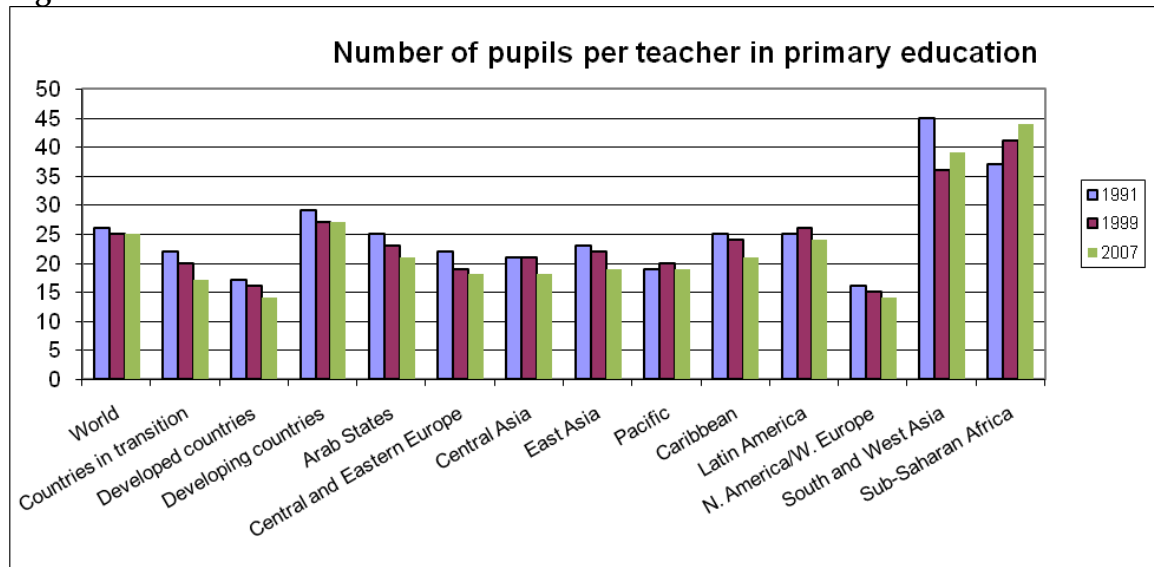
**Figure 5**



(GMR 2010 Statistical Tables Annex: Table 3A)

The GMR identifies a lack of innovative programmes to reach the unschooled (especially girls), poor rates of literacy and poor quality of schooling as factors that combine to make the 2015 targets less achievable. Teacher supply presents a further major challenge. Achieving the goal of UPE by 2015 will require 1.9 million new posts, plus a further 8 to 9 million replacement teachers (see Figure 6). The need for teachers is particularly acute in South and West Asia, where the pupil to teacher ratio has actually increased to 39 students per teacher, and in sub-Saharan Africa, where the average ratio is 44 to 1.

Figure 6



(GMR 2010 Statistical Tables Annex: Table 13)

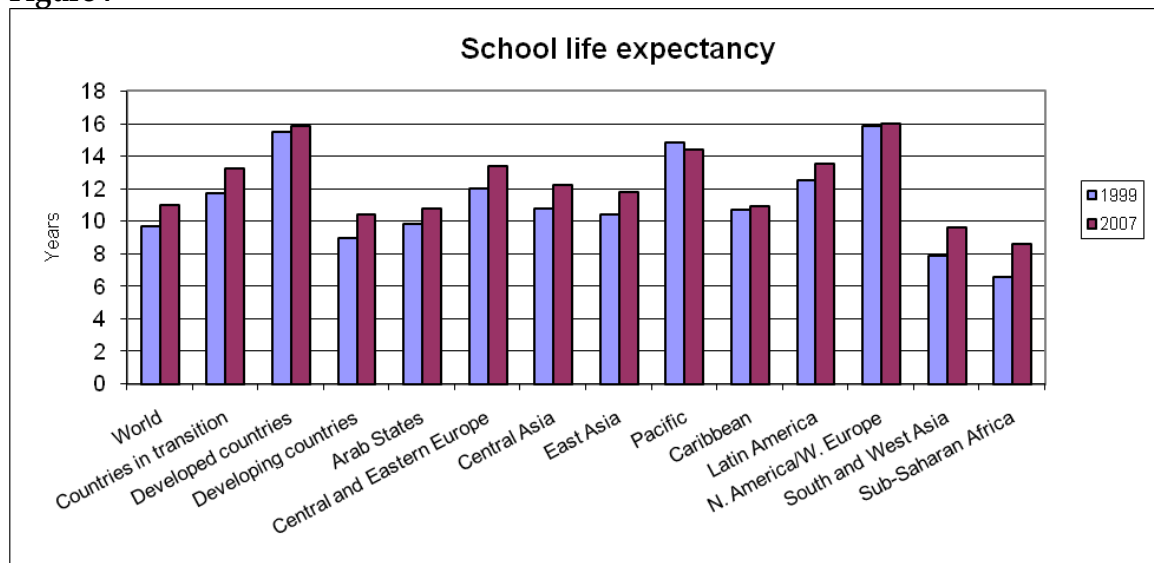
The GMR rightly draws attention to the now broadly accepted view of education as a human right, but it notes that not all countries subscribe to formal treaties and that there is a gap between signing up for and acting upon such commitments.

While noting that some governments fall short in addressing the inherently exclusionary nature of much education, the GMR overly homogenizes the linked concepts of gender, poverty and exclusion. As stated elsewhere in this paper, these factors are not sufficiently disaggregated in the GMR's analysis, and their interdependence is not explored fully (although the Deprivation and Marginalization in Education data compensate for this shortcoming to some extent). The GMR states that "Failure (of governments) to address inequalities, stigmatization and discrimination linked to wealth, gender, ethnicity, language, location and disability is holding back progress towards Education for All" (Executive Summary, p. 5). What the GMR lacks, however, is sufficient qualitative and case-study data that can elucidate the relationships among these factors and, more positively, draw attention to success stories in overcoming inequalities. Too often, the GMR makes recommendations that assume, for example, that changes can be made – access improved, affordability increased, learning environments enhanced and anti-discriminatory legislation enforced – by fiat. The analysis lacks a clear notion of agency – who will do these things, and how will they obtain a mandate to implement them?

In presenting solutions to marginalization and exclusion, the GMR presents Early Childhood Education as a key factor in achieving EFA, especially where ECE is related to child and maternal health concerns. Targeted early childhood education is recommended as a policy goal to enhance the possibility of EFA. The GMR notes that while UPE is progressing rapidly, 72 million children are still out of school and many still drop out. As Figure 7 suggests, there is considerable variation in school life

expectancy (expected number of years of formal schooling) around the world. People living in North America and Western Europe attend school for an average of 16 years, those in the Pacific for an average of 14.4 years and those in Central and Eastern Europe for an average of 13.4 years. By contrast, children in South and West Asia attend school for an average of 9.6 years, and in sub-Saharan Africa for an average of 8.6 years. This means that there is a considerable chance that students in the latter two regions will drop out before they complete secondary school. Children drop out of school for many reasons; some – such as poor education quality and the experience of exclusion within school processes and practices – are school-based, while others – such as gender roles within the home – are not.

**Figure 7**

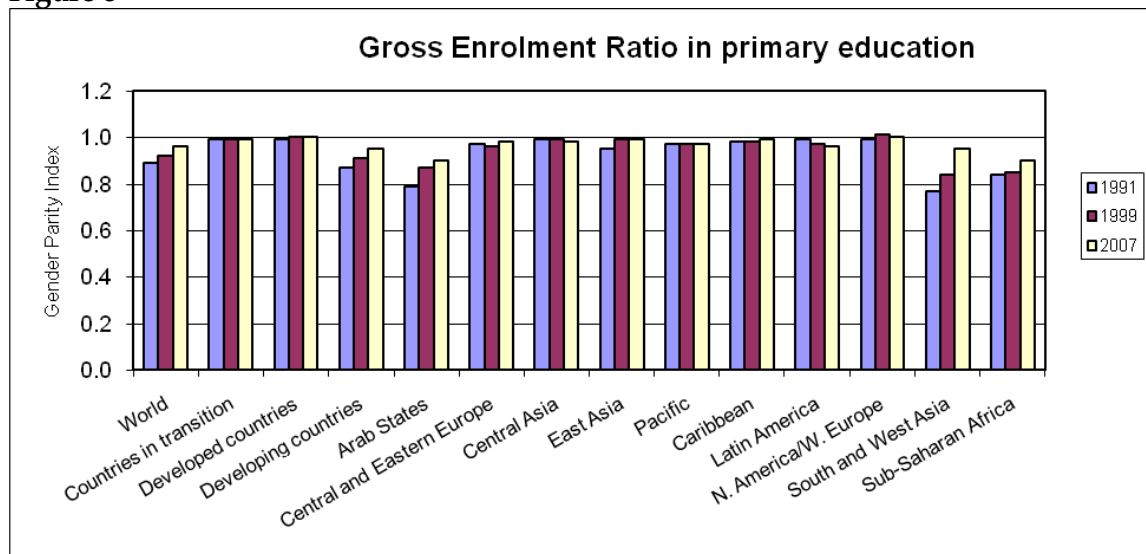


(GMR 2010 Statistical Tables Annex: Table 4)

The poorest countries are still far behind, but some richer countries are also lagging. This fact directly contradicts the GMR’s assessment that donor money is the primary, critical factor in achieving EFA goals. Money alone is not the problem. The GMR does emphasize that a stronger focus on the marginalized is necessary in order to approach 2015 targets. In keeping with its theoretical foundations in liberal economic theory, however, it assumes that increasing funding to existing exclusionary structures and systems will somehow, in and of itself, promote inclusion of ‘the marginalized’ into education. The GMR’s analysis falters when it fails to recognize the socially constructed nature of identities as ‘homogenous’, ‘fixed’ and ‘unequal’, and it also neglects to identify the power relations at the root of marginalization. For example, increased funding is not likely to encourage a child infected with HIV or one from a minority religious sect to attend school if he or she experiences stigma, discrimination or bullying because of his or her health status or background. Although its analysis cannot account for such problems, the GMR falls short of calling for a reconceptualization and transformation of education policy and practice.

Gender parity shows some progress. Figure 8 indicates that most regions have made improvements in gender parity in enrolment in primary education. The most significant improvements in GPI from 1991–2007 were in South and West Asia (an increase of 0.18) and sub-Saharan Africa (an increase of 0.06). On the other hand, gender parity decreased in Latin America (a decrease of 0.03) and Central Asia (a decrease of 0.01) during the same period.

**Figure 8**

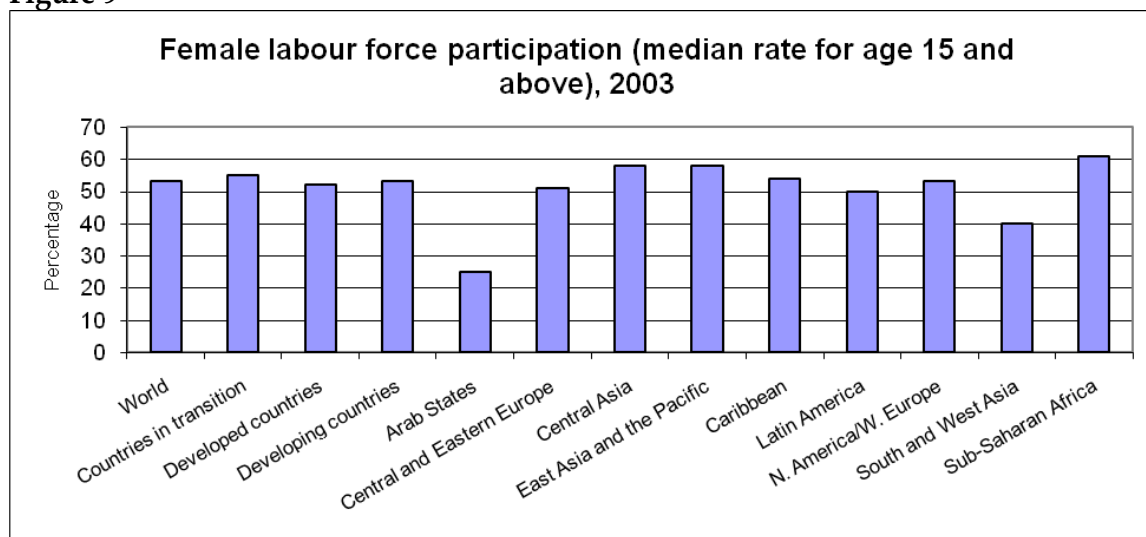


(GMR 2010 Statistical Tables Annex: Table 12)

Successful strategies to increase gender parity are well known. For example, incentives can motivate attitude change, and public policies beyond the school sector remain essential. Regional disparities are common within countries, and out of school issues powerfully affect enrolment, retention and completion rates, especially for adolescents.

The 2010 GMR is particularly strong in its treatment of young adults. The Report indicates that initiatives promoting youth and adult skills present a mixed picture. Some success stories are to be found, but gender discrimination is often entrenched in the labour market. As Figure 9 indicates, there are severe inequities in female labour force participation in the Arab States (where 25 per cent of females aged 15 and above participate in the labour force) and South and West Asia (where the figure is 40 per cent).

**Figure 9**



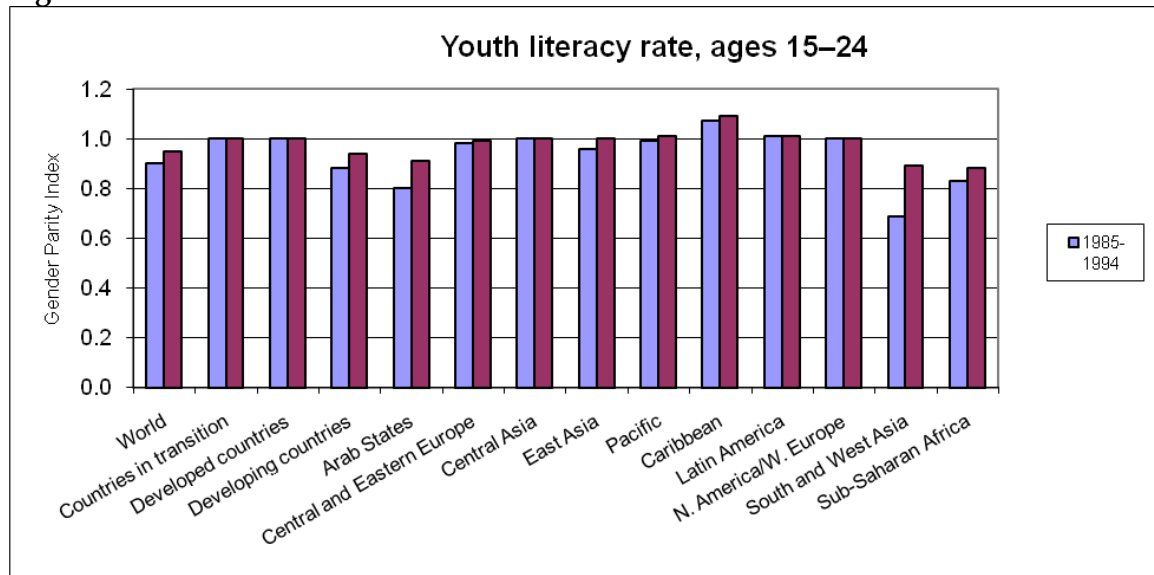
(GMR 2010 Statistical Tables Annex: Table 3A)

Looking at Figures 7 and 9 together, one can see that the outcomes of education for girls do not always include increased labour force participation. For example, in the Arab States, where girls complete on average 10.3 years of schooling, only 25 per cent of females participate in the formal economy. On the other hand, in sub-Saharan Africa, where girls complete on average 7.9 years of schooling – fewer than anywhere else in the world – women have the highest labour force participation rate, at 61 per cent. This indicates that the correlation between schooling and labour force participation for women is often weak, and that other factors, such as culture and gender roles, mediate women’s entry into paid work. This indicates the need for increased school and community engagement.

The GMR also stresses the importance of ‘second chance’ education, which must be linked to employment opportunities. However, school systems alone cannot solve the problem, and additional drivers of change are needed. Unfortunately, youth and adult literacy remains comparatively neglected, and large gender gaps exist. As Figure 10 indicates, these gaps are largest in South and West Asia (where the GPI for youth literacy is 0.20) and the Arab States (0.11). Almost 2 in 3 non-literates<sup>3</sup> are female, although gender parity is rising in most countries.

<sup>3</sup> The term ‘illiterate’ is commonly used throughout the GMR; because of its negative connotations, the term ‘non-literate’ is preferred in this discussion.

**Figure 10**



(GMR 2010 Statistical Tables Annex: Table 12)

The phenomenon of non-literacy mirrors wider social exclusion. This correlation provides a further argument for disaggregating the concept of 'marginalization' that underpins the GMR as a whole.

The 2010 GMR puts a heavy emphasis on the quality of education available to the marginalized. Quality here is measured solely by achievement testing – a definition that perhaps encouraged by the existence of ready-made data from such organizations as the Southern and Eastern African Consortium for Monitoring Educational Quality, the Programme for International Student Assessment or the International Association for the Evaluation of Educational Achievement. This limited view of quality is a weakness in the GMR's analysis, and it underlines once more the need for more nuanced qualitative data. It is quite possible for a pupil who tests poorly to have in fact gained a great deal from his or her schooling. For example, achievement tests do not measure the social skills, norms, values and beliefs students acquire through both the formal content of education and the social interactions experienced within schools. Achievement testing is still poorly conducted in many countries, and it cannot be denied that, for many children, formal learning outcomes after four or five years in school are unacceptably low. Nonetheless, the GMR would do a great service to education by discarding the notion that achievement testing is the sole arbiter of quality in schooling.

The GMR reminds us that gender parity remains a problem area. Out of school issues determine much inequality, but marginalized children also attend poorer quality schools. Moreover, school processes and practices themselves often contribute to marginalization. Educating students in different matters and behaviours according to their social status reinforces existing social inequalities. In this way, schools do more than simply transmit 'knowledge', as laid down in official curricula. Rather, political motivations underlie educational processes and practices, resulting in different social,

cultural and material outcomes for different groups of people. Success and failure in school follow from the combined and interdependent effects of poverty, ethnicity, language, the location of the family home and its distance from school, teacher quality and practice, ratio of teachers to pupils, curriculum (both formal and 'hidden') and available facilities.

### **2.3 The financing of EFA**

The GMR notes that overall aid to education is rising, while basic education funding is stagnating. Overall aid flows to education reached US\$10.8 billion in 2007, more than twice the 2002 level. However, a few donors are not on track to reach the level of commitments made at Gleneagles and elsewhere. Some countries, like the United States, have not increased the proportion of aid-to-Gross National Income figure agreed upon. Japan has actually fallen behind, while others have increased their level of commitment beyond the 0.7 per cent figure commonly agreed upon. A small group of donors appears to bear the greatest part of the financial burden for basic education. Four countries – France, Germany, the Netherlands and the United Kingdom – along with the International Development Agency of the World Bank contributed 60 per cent of the total commitments to aid for education. A wider commitment is lacking, and the distribution of aid to different sub-sectors within education gives cause for concern to those committed to EFA goals. At the same time, too little is known about 'emerging' and private donors and the impact they may have on achieving EFA goals.

The GMR argues that conflict-affected countries are insufficiently supported and that there is little policy support from Organisation for Economic Co-operation and Development/Development Committee countries. But the Report barely explores the inherent problem of trying to help fragile states and conflict-affected countries using traditional development aid approaches. The central question is not whether development partners should or should not assist such countries, but rather how they can support them effectively.

The economic downturn will have a negative impact on support for education. Ireland will cut its aid budget by nearly 20 per cent, although it promises to revert to earlier levels when circumstances improve. Poorer countries will themselves be hit by the downturn, and their needs will become more urgent.

As noted in previous Reports, aid should be more predictable, and development partners should use national financial systems for aid disbursement rather than parallel machinery of their own. Overall, aid needs to be better coordinated and more results-based. Experience has shown that commitments to aid are one thing and disbursements another.

Perhaps the most controversial topic within the GMR's analysis of the growing financial challenge in meeting EFA targets is its contention that the EFA Fast Track Initiative (FTI) has been largely ineffective. The GMR devotes substantial space to call for reform of the

FTI, citing the need for more recipient input, better procedures, more emphasis on public-private partnerships, better advocacy and the recruitment of high-level political champions. The GMR team draw attention to what they see as the comparative success story of the more independent global health funds, such as the Global Fund to Fight AIDS, Tuberculosis and Malaria. They argue that this fund's governance and management principles should be applied to the FTI, mainly by taking it out of the World Bank's ambit.

The recent independent evaluation of the FTI<sup>4</sup> does indicate significant problems with the organization, but its recommendations focus largely on streamlining and democratizing its processes and enhancing the effectiveness of the fund rather than root-and-branch restructuring, as proposed by the GMR team. At its meetings in Paris in December 2009, the EFA Working Group questioned the selectivity and relevance of the evidence upon which the GMR based its conclusions regarding the FTI. Although the FTI process has not fulfilled initial hopes and expectations, there is no doubt that it has achieved much. By spending so much time on this issue – to the detriment of more pressing concerns such as the implementation of EFA Goal 5 or the role of HIV and AIDS in marginalization – the GMR team has diverted the focus away from other issues that must be dealt with if EFA is to be approached, let alone achieved.

To conclude this discussion of the financial dimensions of the 2010 GMR, it should be reiterated that the GMR creates the impression that the key to achieving EFA goals lies in more – and more predictable – financial support, particularly from donors. Like the 2009 Report, which identified governance as the critical dimension, the 2010 GMR relies too heavily on the 'single shot' answer to the challenges facing the educational community, especially in the face of an economic downturn. Of course, the 2010 GMR, like those before it, does discuss the impact of poverty, gender, ethnicity, exclusion from the mainstream and a variety of other factors that slow progress towards EFA enrolment and retention goals. Yet its analysis does not fully recognize the interaction and interdependence of all these factors. It must be acknowledged that a 'system' operates to restrict access to education for some children – the hearing-impaired girl living in a rural environment, far from a school, or the child living in an HIV-affected home with no wage-earners. No amount of donor money poured into a central Ministry of Education can be expected to change the realities of such 'systems'. Aligning educational policy and planning with broader political, social and developmental policies is the sine qua non for change. The GMR's understanding of marginalization, as discussed earlier, does not allow for a comprehensive analysis of these systemic problems, nor does it point toward thoroughgoing solutions. Ensuring education for all children is not a question of getting the governance of education right or putting marginalization and inequality on the agenda – it is much more a matter of political will for social change. The education community cannot wait for social change to happen and must do the best it can until greater equity becomes a reality. A good start is the principle that an inclusive society starts with inclusive schools – a message well expressed in the 2010 GMR.

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<sup>4</sup> See 'Mid-Term Evaluation of the Education for All Fast Track Initiative', November 2009, Cambridge Education/Mokoro/Oxford Policy Management. - <http://www.camb-ed.com/fasttrackinitiative/>

## **2.4. Marginalization as a central theme**

As noted above, marginalization is a much-debated topic, and this debate is more than an academic exercise of competing definitions. The GMR, which focuses on overcoming injustice, defines marginalization as “a form of acute and persistent disadvantage rooted in underlying social inequalities” (Page 135). However, the report does not discuss the sources of these social inequalities, which stem from the social construction of identities as ‘homogenous’, ‘fixed’ and ‘unequal’ and from power relations. The broader concept of social exclusion would certainly have provided a sharper set of tools for examining how people are shunted outside the mainstream of political, economic and educational opportunity.

The GMR notes that informal discrimination is widely prevalent. Even where apparently equal opportunities exist, parents cannot afford to send their children to school. This kind of situation indicates a lack of will and commitment rather than a lack of financial resources, thus undermining the parents may fail to send their children to school ‘Disadvantage’ covers a cluster of issues such as gender, poverty and ethnicity; combined, these issues give rise to social exclusion or separation from the mainstream. Political action for the marginalized falls short of the Dakar commitments. The GMR asserts that inclusive education is a prerequisite for more inclusive societies – that is, education must be seen as a driver of social change rather than a transmitter of social inequity. Many governments are systematically violating their obligations regarding equity, and sound policies, promoted and supported by international organizations and donors are needed to counter and prevent these violations.

## **2.5. Measuring marginalization in education**

The 2010 GMR uses a new instrument to measure marginalization, the Deprivation and Marginalization in Education (DME) tool. Data from some 80 countries has been used to determine the size and extent of the problem. In 22 countries, education poverty – defined as having less than four years of education – affects 30 per cent of those aged 17 to 22. In Burkina Faso and Somalia, extreme education poverty – defined as having less than two years of schooling – affects 50 per cent of the same age group. Quantitative measures of this sort mask extremes, especially where females are concerned. In Morocco, 88 per cent of poor females have less than 4 years of schooling. Pakistan has three times the level of education poverty of Viet Nam, which has a similar per capita income. Gender, wealth and regional differences account for these disparities.

The GMR concludes that all countries have marginalized groups and that formal education systems can feed the processes of marginalization as well as being shaped by them. The main education-related issues identified by the GMR team as contributing to marginalization include few years spent in school, poor quality of schooling, inequitable opportunities and a lack of inclusive approaches. The Report finds that gender issues magnify inequities; a large percentage of young children have never been to school, and most of these are girls.

The GMR proposes that public policies may be more important than levels of wealth as determinants of educational deprivation. Factors such as gender, location, ethnicity, language and disability combine to produce marginalization. Regional disparities also contribute, as do conflict, displacement of people, geographical isolation and other factors. Marginalized groups tend to receive poorer quality education. Having a home language that differs from the medium of instruction or the national language affects achievement, as do household poverty and parental levels of education. The GMR notes that similar constraints operate even in richer countries.

## **2.6. Out of the mainstream**

A range of interacting forces typifies social exclusion. No general rules apply, except that household poverty appears to be a key factor. Economic shocks, natural disasters, conflict and child labour practices all play a part in marginalization, as do early marriage and resistance to government initiatives, especially for girls. Indigenous groups generally have less access to education. The alignment of home and school languages is a critical factor in access and retention, and location and parental livelihood are also important.

The GMR takes up the issue of disability and inclusion to reiterate the accepted position in favour of including disabled children in mainstream education, as opposed to placing them in separate facilities. In a surprisingly brief discussion, the GMR goes on to note the role of the AIDS pandemic in reinforcing gender disparities. Unfortunately, it frames HIV and AIDS as only 'a health issue', ignoring its social, economic and educational impacts. While becoming orphaned is seen as a serious disadvantage, the degree to which stigmatization and slow governmental responses to HIV and AIDS also contribute to marginalization is not acknowledged. This apparent underemphasis on the various impacts of HIV and AIDS on marginalization is picked up and extended below. At this point it must be noted that the GMR's discussion of HIV and AIDS fails to provide a robust and nuanced sociological analysis. For example, there is no mention of how the construction of 'passive' femininities and 'machismo' masculinities, both in schools and in society more generally, contributes to unsafe sexual practices as well as poor access to, and underuse of, reproductive health services. Again, a discussion of 'identities' and 'power relations' is missing.

Analysing marginalization in its many forms and employing new instruments like the DME are only the first steps in addressing the fundamental issue. What does the GMR have to say about solutions, or at least promising avenues? The first thing the Report notes is that the marginalized themselves are rarely present in national or international debates concerning their status and opportunities (indeed, no representatives of the marginalized were present at the Working Group meeting in Paris, except by international non-governmental organization proxies). The voices of the marginalized thus often remain unheard.

Strengthening commitments by governments to inclusion and policy formulation are identified as key principles for seeking inclusive approaches and strengthening local and community provision. The GMR advances the notion of Schools for All to counteract disadvantage, prepare teachers adequately and better reflect the needs of different communities and interest groups. It also encourages the mobilization of civil society and the promotion of rights-based, legally binding commitments. According to the GMR, governments should use incentives and integrate school activities with other anti-poverty strategies. They need to develop better data to identify groups at risk and more accurately pinpoint drivers of marginalization, and they must address the interlocking causes of disadvantage. Budgets and initiatives should be targeted, and more should be spent per capita on the marginalized. Governments and donors must set equity-based targets, and a mechanism is needed to get donors to honour aid commitments. The GMR also points out the need to improve aid effectiveness and 'architecture', to integrate nongovernmental organization activities and to expand social and political mobilization. None of these proposals is new. H. M. Phillips, in his 1975 book *Basic Education: A World Challenge*, makes 52 recommendations for achieving UPE, and many of them dovetail with our concerns of 35 years later. The challenge is not so much in identifying solutions as in finding the will and commitment to apply them.

### **3. The 2010 Global Monitoring Report through an equity and inclusion lens**

#### **3.1. Reflections from 'critical friends'**

As noted above, the GMR's conceptual starting point may not be ideally suited to the task at hand. A deeper discussion is necessary to determine what is meant by marginalization, disadvantage, disability, social exclusion and so on. The debate is not merely academic; it deeply affects the analysis and the solutions offered. The GMR itself points out that many of the causes of marginalization are to be found outside the school, and that schools should be the drivers of social change rather than reinforcers of inequity. Yet it is hard to think of examples of school systems that have succeeded in driving social change, even in wealthier countries<sup>5</sup>. Schools reflect the societies in which they are found, and when they fall out of step with community values – for instance, in language policy or by favouring vocational subjects to the detriment of more academic ones – communities express dissatisfaction. Schools and civil society mutually construct and reinforce one another.

The 2010 GMR is much more sensitive to gender issues than heretofore, and UNGEI acknowledges this. But that is only how the Report should be; nobody has done the gender cause any favours. Questions remain concerning the depth of the analysis and whether it adequately addresses UNGEI's earlier concerns, as mentioned in the introduction (e.g., disadvantage within schools, girls as subject to more than one form of exclusion). Inclusion, broadly interpreted, is a prominent and recurring theme of the

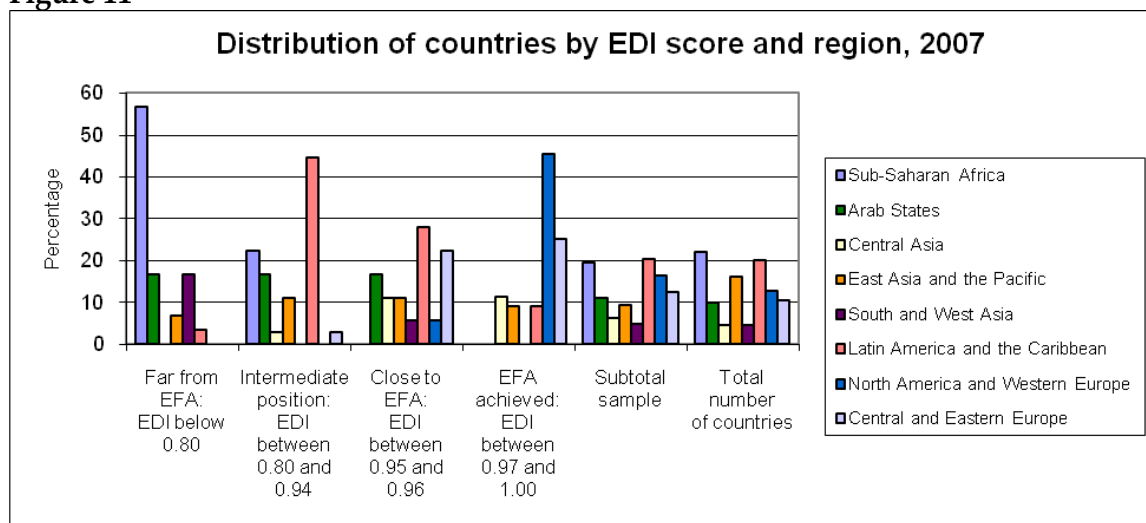
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<sup>5</sup> Consider, for example, the persistence of a class-bound society in Britain, despite the country's switch to comprehensive education in the 1960s, or the unsuccessful attempts by Tanzania and Zambia to redirect parental and pupil values towards a more socialist or humanist position.

2010 GMR. This message has been absorbed well, although gender, race, disability and other factors are not sufficiently disaggregated. The GMR misses insights that could be gained by separating out the multiple forms of exclusion and exploring their intersections in greater depth. The Report also makes the assumption that absorption of the marginalized into the mainstream is automatically desirable. There may be very sound reasons for groups and communities to want to remain on the outside, particularly where they perceive threats to their language and cultural norms.

The statistical tables indicate progress towards EFA goals, but there are strong regional variations. As Figure 11 indicates, sub-Saharan Africa remains far from achieving EFA; 57 per cent of countries have an Education Development Index (EDI) score below 0.80. EFA goals are also far from being attained in 17 per cent of Arab States and 17 per cent of countries in South and West Asia. On the other hand, 44 per cent of Latin American and Caribbean countries, 22 per cent of sub-Saharan African countries and 17 per cent of Arab States are in an intermediate position. Countries close to achieving EFA include 28 per cent of Latin American and Caribbean countries, 22 per cent of Central and Eastern European states and 17 per cent of Arab States. Of the states that have achieved EFA, 45 per cent are in North America and Western Europe and 22 per cent are in Central and Eastern Europe. These statistics indicate progress towards EFA goals, although they mask significant intraregional disparities and thus require further refinement and disaggregation according to wealth, gender, language, the rural-urban divide, HIV and AIDS, and other factors.

**Figure 11**



(GMR 2010 Education for All Development Index Annex: Table A.1)

As noted above, each annual GMR tends to use the same standard set of tables, with figures updated from year to year. UNGEI has previously asked that more qualitative and case study material be incorporated into the GMR as a means of verifying data or giving it a richer texture.

While the GMR cites the importance of international rights-based instruments, it does not indicate how these are to be enforced or how they should be mobilized to deal with entrenched exclusion in education. How can signatory governments be made to comply with their own commitments? Who exactly is able and willing to act in these instances?

Cultural issues and their influence on exclusion merit a greater emphasis than the GMR gives them, but the Report's most glaring weakness is in its treatment of HIV and AIDS. Considering the pandemic's far-reaching impact on gender equity, marginalization and exclusion, the Report's very brief and limited discussion comes across as sorely inadequate. There is no reference to more targeted aid or linking education initiatives to broader social action. The 2007 World Bank publication *The Link between Health, Social Issues and Secondary Education* is only one of many to have looked at education's response to the HIV and AIDS challenge in Africa. Analyzing the curriculum, challenging gendered identities and power relations, addressing relations between home and school, developing staff succession strategies, improving teacher sensitization, financing orphaned children – these and a host of other topics relevant to AIDS and marginalization are wholly neglected in the 2010 GMR, which instead devotes a disproportionate amount of space to the FTI.

As its discussion of the FTI shows, the GMR sees 'Rising to the EFA Challenge' largely as a matter of getting the finances right. It also stresses the role of governments in setting the agenda and the pace. The seven points distilled from Chapter 2 are almost exclusively 'national' priorities; seven of the steps in the 'ten-step plan' found at the conclusion of Chapter 5 require governments to be the prime movers. However, the clear implication is that unless aid flows are increased, targeted and better coordinated, national governments will not be able to address marginalization issues effectively.

The GMR frequently alludes to political will and commitment by national governments but suggests no strategies for how this is to be achieved. Will an even stronger set of recommendations from more United Nations-sponsored meetings or higher level forums spur real action? Will the real action ensue only when country representatives and delegates from international nongovernmental organizations take the messages home? The GMR is in danger of becoming 'just another report' if it does not attend to how the agenda is to be carried forward. This relates also to the Report's treatment of the FTI. A prime concern of the FTI has always been to get the financing and policy environment right for greater equity and inclusion. That the fund has been less successful than hoped for is a given, but it remains an important vehicle for ensuring that marginalization, exclusion and disadvantage are addressed in an organized and coherent way. Policy commitment, planning capacity and implementation capability are the three legs on which any successful programme must stand and which the FTI supports.

Overall, the 2010 GMR's use of 'inclusion' as a linking theme has many merits, in that it encourages a greater focus on gender and its relation to poverty and exclusion. Less positive are the GMR's lumping together of disparate causes and effects and its over-reliance on external aid as the main driver of progress.

### **3.2. Expectations for the 2011 Global Monitoring Report**

Throughout this analysis and commentary, a number of suggestions and recommendations have been made. With a view to influencing deliberations surrounding the 2011 GMR, the key messages from this analysis can be summarized as follows:

- EFA Goal 5 (gender parity leading to gender equity) cannot be ignored in future Reports; all EFA goals demand equal attention.
- Marginalization is highly contextual; let context be a significant concept in future GMRs.
- Conflict-affected countries are by definition difficult to support; pleas for greater efforts need to be accompanied by workable strategic proposals.
- Gender means more than women and girls; the concept needs to be unpacked and the power relations inherent in a given context more fully explored.
- The Report must balance economic and sociological analyses.
- The role of communities and community-based organizations in the education enterprise needs much more attention.
- Overemphasis on prominent issues (e.g., finance) to the comparative exclusion of others should be avoided.
- Where alternatives to 'business as usual' are recommended, it is helpful to indicate what some of these might be in more than general terms.

### **3.3. Key recommendations**

In addition to this set of summary points, it would be important for future GMRs to bear the following UNGEI/IATT recommendations in mind:

1. Getting through to the marginalized and hard-to-reach will require innovative mitigating and adaptation strategies. 'Business as usual' will not work. Additional finances are necessary but not sufficient.
2. Governments, supported by financial institutions and other development partners, need to establish social protection mechanisms to safeguard human development and to address marginalization, especially for girls. This is particularly important in times of economic and financial crisis.
3. Governments and donors must at least maintain current financial commitments to education. They must also ensure that budgets are gender-responsive and address marginalization.

4. Additional capacity-building and technical assistance may be required. The High Level Group should encourage countries to adopt and use the inter-agency Equity and Inclusion Tool in their EFA planning process.
5. Poverty and gender inequality are two dominant and cross-cutting factors that compound marginalization and exclusion. The interaction between these factors should figure prominently in future reports.
6. HIV and AIDS have not been adequately addressed in this year's GMR. The AIDS epidemic is a development crisis with a heavy impact on educational access and outcomes in many settings. Future reports should consider the importance of this issue.





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