Tenth meeting of the Working Group on Education for All (EFA)

Concept paper on Marginalization[1]

Paris, 9-11 December 2009

1. Introduction

As set down in the 1948 Universal Declaration of Human Rights and other international human rights conventions, the opportunity to receive a meaningful education is a fundamental human right for all children, youth and adults. But the world is systematically failing to address extreme and persistent education disadvantages that leave large sections of society marginalized. Some 72 million children were out of school in 2007 (54% of them girls) and about 759 million adults (two-thirds of them women) lacked basic literacy skills. Global challenges, notably the recent financial and economic crises, puts education at risk and disproportionally impacts the poor, with serious implications for marginalized populations. Education for All (EFA) cannot be achieved without overcoming marginalization. Failure to place inclusive education at the heart of the EFA agenda is holding back progress towards the EFA and Millennium Development Goals. Fair and inclusive education is one of the most powerful levers available for offsetting social disadvantage, creating a virtuous circle of opportunity, and making societies more equitable, innovative and democratic.

2. Concepts of marginalization and inclusive education

Marginalization: There is no agreed definition of "marginalization", and what that entails in education. *The EFA Global Monitoring Report 2010: Reaching the marginalized,* however, defines marginalization as "a form of acute and persistent disadvantage rooted in underlying social inequalities". Some examples of the most disadvantaged sections of society are girls and women, hard-to-reach groups such as indigenous people and ethnic minorities, poor households, people living in informal settlements, individuals with disabilities, rural populations, nomadic populations those affected by armed conflict and HIV and AIDS, and street and working children.

Inclusive education: Building on the Salamanca Statement and Framework for Action on Special Needs Education, a broadened concept of inclusive education was adopted at the 48th Session of the International Conference on Education in 2008 as "an ongoing process aimed at offering quality education for all while respecting diversity and the different needs and abilities, characteristics and learning expectations of the students and communities, eliminating all forms of discrimination".

3. Measuring and understanding marginalization

Reaching marginalized children, youth, and adults requires political commitment backed by practical strategies and policies for inclusive education. Measuring and understanding

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[1] Based on the *EFA Global Monitoring Report 2010: Reaching the marginalized*

marginalization is an important first step to overcoming it. Household surveys and other data provide insights into the relationship between poverty, ethnicity, health, parental literacy and and education. Disaggregated data can provide policy-makers with the means to identify social groups and areas characterized by high levels of deprivation.

- Recommendation: Invest in data collection and analysis as an integral part of national educational plans and poverty reduction strategies. Develop data collection systems that focus on disaggregated statistics in order to identify marginalized groups and areas characterized by high levels of deprivation and monitor their progress. Identify the drivers of marginalization for specific groups.
- Recommendation: Set equality-based targets for all of the six EFA goals

The *EFA Global Monitoring Report 2010* presents a new international tool, the **Deprivation and Marginalization in Education (DME) data set,** to help governments and development partners chart the dimensions of marginalization, identify patterns of individual and group disadvantage, and therefore inform policy design and public debate[2]. The analysis made by the GMR focuses on three core areas:

1) The bottom line - to measure absolute deprivation defined in terms of years in school: This analysis takes four years as the minimum required to gain most basic literacy and numeracy skills, and identifies people aged 17 to 22 who have fewer than four years of education as living in "education poverty" and those who have fewer than two years as living in "extreme education poverty".

While the vast majority of adults in rich countries will have accumulated 10 to 15 years of education, nearly one out of three in the 22 countries covered by the DME data have fewer than four years of education. In eleven of these countries, the figure rises to 50%. In 26 countries, 20% or more of those aged 17 to 22 have fewer than two years of schooling.

2) The bottom 20% with the least years of education: This analysis examines the number of years individuals aged 17 to 22 have accumulated in education to identify the individual and group characteristics of the bottom 20%. Knowing the characteristics of the "bottom 20% in education" helps understand the relative national scale of deprivation. The data can be used to assess the weight of discrete variables such as household income, language and ethnicity, gender, region and location. The disadvantages that drive people into the bottom 20% in education intersect with and even magnify the wider social inequalities and circumstances, thus restricting educational opportunities.

3) The quality of education by assessing learning achievement: Within a given time, what children actually learn depends on a wide range of factors, including the quality of education and home circumstances. This analysis looks at marginalization in learning achievement using national and international evidence.

The achievement deficit is widely spread across individuals and groups facing broader

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[2] 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.

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educational disadvantages, predominantly in the poorest countries, but also in richer countries. Marginalized individuals and groups do not just accumulate fewer years of education. They often receive a poor-quality education that result in low levels of learning achievement. Evidence from schemes to measure learning shows that factors such as household wealth, parental education and home language exercise a pervasive influence on learning achievement.

Underlying causes of educational marginalization are diverse and interconnected. Given that nearly 1.4 billion people live on less than USD 1.25 a day, household poverty is one of the strongest and most persistent factors contributing to educational marginalization and, therefore, a formidable barrier to EFA. The effects of poverty are strongly conditioned by social attitudes. Moreover, the poorest households often cannot ensure their children continue to receive schooling when faced with external shocks such as droughts, floods or economic downturns. With 166 million children aged 5-14 engaged in labour in 2004, child labour remains a barrier to education. The group-based identities such as ethnicity, race, language, or culture are also among the deepest fault lines in education, and are often reflected in human geography. People living in slums, remote rural areas or conflict-affected zones are typically among the poorest and most vulnerable in any society, and are underserved in education. Disability remains one of the least visible but most potent factors in educational marginalization, with an estimated 150 million children facing associated difficulties. HIV and AIDS also have a wide-ranging impact on education, as an estimated 33 million people were living with the pandemic in 2007. Although these different groups face distinct challenges, they share discrimination and stigmatization which limit their education opportunities.

4. Policies and programmes to address educational marginalization and support inclusion
Another matter of crucial importance to overcome educational marginalization is political commitment backed by inclusive and holistic policies that address the structure and underlying causes of inequality and equalize opportunity by addressing unequal power relationships. There is no single formula, but sustained political commitment to social justice, non-discrimination, equal opportunity and basic rights leads to progress.

The 2010 GMR identifies three broad sets of policies that form an **inclusive-education triangle**: "accessibility and affordability"; "learning environment"; and "entitlement and opportunities".
- Recommendation: Adopt an integrated inclusive policy approach that addresses interlocking causes of disadvantage, within education and beyond.
- Recommendation: Strengthen political leadership to tackle marginalization through clear policy objectives and education targets. Improve coordination within government through active engagement of civil society, the private sector and marginalized groups.

3.1 Affordability and Accessibility:
Make education affordable: Governments in many countries have abolished formal school fees, but indirect costs and informal charges continue to keep school out of reach for millions of children. Other issues, notably private supplementary tutoring, affect affordability. 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.

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- Recommendation: Governments need to improve affordability by removing formal and informal fees and providing targeted financial support to the marginalized.

Ensure that schools are accessible: Distance to school remains a major barrier to EFA, in particular for girls, due to security risks associated with long distances between school and home. Equitable allocation of school and classroom construction that address the needs of marginalized areas and populations can improve physical accessibility and reduce distance to schools. More flexible models, including multi-grade and mobile schools, can open the doors to education for some marginalized groups, especially in rural areas. The use of technologies can also complement teacher-student contact at times when children cannot make it to school.

Many marginalized children, youth and adults lack an entrance or a way back into education. A large percentage of the more than 71 million out-of-school adolescents are denied a second chance, often due to a lack of flexibility in national education systems. Some 759 million youth and adults are deprived of minimal education and thus of "a route to greater social mobility and a way out of poverty". Literate parents, and especially educated mothers who are more likely to send their children to school, can act as agents for change to stop the vicious cycle of marginalization. Non-state providers such as NGOs, communities and the private sector can provide education that complements formal schooling and puts children, youth and adults on a route back into the formal system. Re-opening doors to education can also be done through provision of learning programmes that build bridges between skills training and employment for marginalized youth and adults. They also play a vital role in post-conflict settings.

- Recommendation: Construct classrooms closer to marginalized communities informed by analysis of disaggregated data and school mapping exercises. Explore more flexible approaches to provision, including mobile schools for rural populations, multi-grade teaching in remote areas and distance learning with the use of technologies.

  Recommendation: Providing a first or second chance to adolescents and adults and out-of-school children by exploring a space for expansion of non-formal education that is complementary and integrated into national systems as a route back into formal schooling or into meaningful employment. Provide learning programmes that are relevant to needs of youth and adults through a multi-sectoral approach, including strengthening of technical and vocational education (TVET). Renew the commitment to combat adult illiteracy through proper resourcing of national programmes. Scale up governments' efforts to monitor non-state provision, integrate it into national systems, and ensure an appropriate environment, including regulatory frameworks.

3.2 Learning environment

Develop inclusive learning environments: Learning environment matters. Typically those who enter school carrying the weight of disadvantage receive the worst education. They are often taught by poorly trained teachers, sometimes in a language they do not understand. Textbooks are frequently unavailable or include material that depicts negative stereotypes. Governments can address these problems by creating an enabling learning environment, beginning with providing incentives for skilled teachers to work in marginalized areas. 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 equally important. Channeling extra resources and pedagogical support to 'failing' schools can benefit

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areas of greatest need. Ability grouping should be avoided as it seldom helps the marginalized.

- Recommendation: Change patterns of teacher recruitment and deployment by encouraging people from marginalized communities to become teachers and by providing financial incentives to encourage well-trained and motivated teachers to be allocated to marginalized areas and schools. Train teachers to address marginalization.
- Recommendation: Target financial and pedagogical support to schools in the most disadvantaged regions or that have many marginalized children.
- Recommendation: Ensure that a relevant curriculum in an appropriate language is offered. Promote intercultural and bilingual education where appropriate.
- Recommendation: Make rules, attitudes and systems responsive to the needs of children, youth and adults with disabilities. Integrate children with disabilities into the standard education system, when appropriate, to break down the segregation that reinforces stereotypes, and provide highly specialized support to children with severe disabilities.

5. Holistic and multi-sectoral responses to level the playing field

Problems such as social inequity and poverty levels are major obstacles to the implementation of inclusive education policies and strategies, and need to be dealt with within a framework of integrated and/or inter-sectoral national policies for social inclusion.

Entitlements and opportunities: Laws, norms and rules play a role in empowering marginalized people, overcoming discrimination and realizing the right to education. International and national legal instruments can enhance equity not just by setting standards for public policy, but also by enabling marginalized people to claim entitlements. The Universal Declaration of Human Rights and other instruments operating under the auspices of the UN set standards for rights in education and provide a backbone for the other EFA goals. National legislation can prohibit formal discrimination and create an environment that enables greater equity. Laws are most effective when linked to social and political mobilization on the part of marginalized people and the development of broad-based alliances to advance EFA.

- Recommendation: Ensure that national legislation is aligned with human rights principles, including those of non-discrimination and equal educational opportunities set out in international instruments. Enforce laws against discrimination.
- Recommendation: Expand the entitlements of the marginalized through political and social mobilization involving the marginalized for reforming and enforcing legislation.

Social protection – conditional cash transfers and beyond: Social protection is a critical pathway to mitigating the vulnerability that comes with poverty. Conditional cash transfer programmes in Latin America, for example, have a strong track record in improving school attendance and progression. Several countries in sub-Saharan Africa are also investing in social protection programmes, such as the Productive Safety Net Programme that provides guaranteed employment for drought-affected communities in Ethiopia. School feeding programmes also play a role, and enhancing support to maternal and child health and nutrition through equitable access to pre-school provision can also act as another form of social protection. Moreover, social protection provides a mechanism for integrating programmes that address child labour into wider national poverty reduction efforts. Detailed attention to equity and cost-effectiveness must is required when designing interventions.

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- Recommendation: Strengthen social protection measures, using cash transfers and risk-management interventions such as employment programmes to build the resilience of vulnerable households.
- Recommendation: Scale-up school feeding programmes, where appropriate, and enhance support to maternal and child health and nutrition through equitable pre-school provision.

Budgeting against marginalization: National budgets can play a vital role in equalizing educational opportunities. Redistributive public spending is one of the keys to expanding entitlements and opportunities. Most countries have some redistributive element in public finance, but it is typically underdeveloped. The federal government transfer programme in Brazil is an example of an attempt to narrow large state-level financing gaps in education, with some positive effects.
- Recommendation: Increase resource mobilization for education and strengthen equity in public spending. Ensure that marginalized groups have a stake in new sources of national wealth through redistribution of public funds.

Integration of education interventions into wider policies: Breaking down disadvantage requires simultaneous public action across a broad front, with education interventions integrated into wider policies for social inclusion. Poverty Reduction Strategy Papers (PRSPs) can play an important role in addressing the concerns of marginalized populations and coordinating health and social welfare issues that affect educational opportunities and learning outcomes of the marginalized. Many PRSPs emphasize the importance of governance reform, often presenting it as a separate pillar of poverty reduction, while governance reform has also become increasingly prominent in education sector planning.
- Recommendation: Ensure that PRSPs address causes of marginalization in education sector plans and budget planning. Strengthen the linkage between education and broader governance reform through PRSPs.