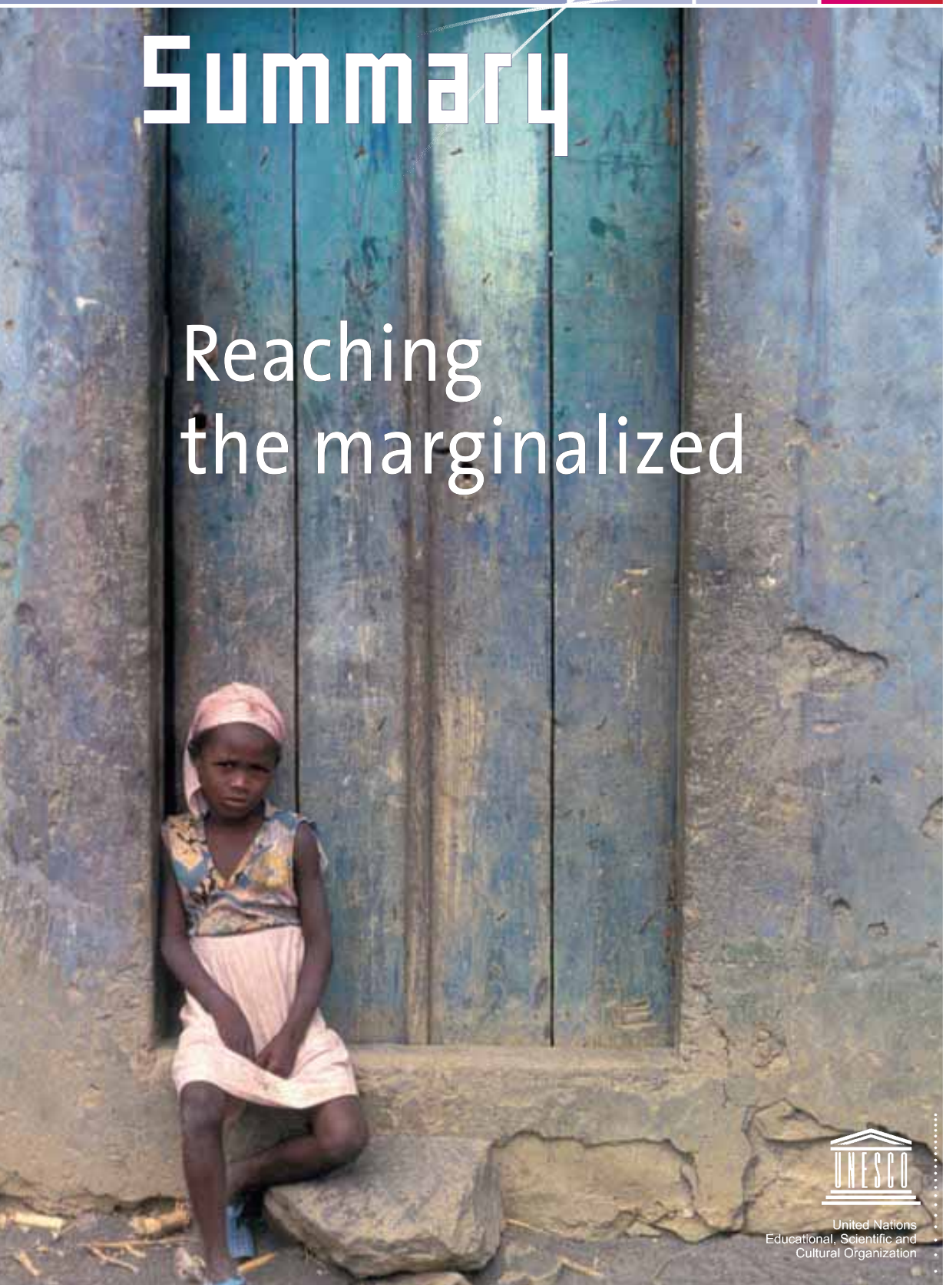
EFA Global Monitoring Report 2010

Summary

Reaching the marginalized

Education for All



United Nations
Educational, Scientific and
Cultural Organization

Reaching the marginalized

Summary

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Previous EFA Global Monitoring Reports

2009. Overcoming inequality: why governance matters
2008. Education for All by 2015 – Will we make it?
2007. Strong foundations – Early childhood care and education
2006. Literacy for life
2005. Education for All – The quality imperative
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Foreword

This edition of the *EFA Global Monitoring Report 2010, Reaching the marginalized* comes at a time of great uncertainty. We are still grappling with the far-reaching impact of the global financial and economic crisis, not only on the world's banking systems, but on all areas of human development – including education. We are at a crossroads. Either we continue with business as usual and risk undoing the considerable progress made over the past decade, or we use this crisis as an opportunity to create sustainable systems that promote inclusion and put an end to all forms of marginalization.

The gains achieved since the Education for All and Millennium Development Goals were adopted in 2000 are undeniable: great strides have been made towards universal primary education, increased participation in secondary and tertiary education and, in many countries, gender equality. More widely, there have been improvements in overcoming hunger, poverty, and child and maternal mortality.

The global financial crisis could radically change all this. *Reaching the marginalized* demonstrates that declining government revenue and rising unemployment now pose a serious threat to progress in all areas of human development. Government budgets are under even greater pressure and funding for education is especially vulnerable. So are poor households. Rising poverty levels mean that the challenge of meeting basic human needs is a daily struggle. Lessons from the past teach us that children are often the first to suffer – as is their chance to go to school.

In response to this crisis, governments urgently need to create mechanisms to protect the poor and vulnerable. They must also seize the opportunity to build societies that combat inequality, so that all may benefit and prosper. Education is at the front line. Not only do schools teach literacy and lay the groundwork for productive lives, they also play a crucial role in promoting tolerance, peace and understanding between peoples, and in fighting discrimination of all kinds. Schools are the place where indigenous groups can learn to read and write in their mother tongue, where cultural diversity can thrive and where children can try to escape the hardships of conflict and displacement.

This year's *Global Monitoring Report* underscores that there is a long way to travel. There are still at least 72 million children who are missing out on their right to education because of the simple fact of where they are born or who their family is. Millions of youths leave school without the skills they need to succeed in the workforce and one in six adults is denied the right to literacy.

The 2010 Report is a call to action. We must reach the marginalized. Only inclusive education systems have the potential to harness the skills needed to build the knowledge societies of the twenty-first century. The international community has a determining role in supporting countries' efforts to protect and expand their education systems. We must not abandon them at this critical juncture. Promises to help poor countries out of the crisis must now translate into the financial resources that many governments so urgently need.

It is my intention that UNESCO should continue to vigorously advocate for increased investment in education. As the lead agency for Education for All, we have a special responsibility to encourage and support those most at risk from the present crisis. As we stand at the crossroads, with only five years left to meet our collective commitments, let us have the courage and determination to choose the path that lets all children, youths and adults fulfil their right to education.

Irina Bokova

Highlights of the EFA Report 2010

Ten years have passed since the international community adopted the six Education for All goals in Dakar in 2000. The record since then has been mixed. While much has been achieved over the past decade, many of the world's poorest countries are not on track to meet the 2015 targets. Failure to reach the marginalized has denied many people their right to education. With the effects of the global economic crisis still being felt, there is a real danger that much of the progress of the past ten years will stall or be reversed. Education is at risk, and countries must develop more inclusive approaches, linked to wider strategies for protecting vulnerable populations and overcoming inequality.

Minimizing the impact of the financial crisis on education

The international community needs to identify the threat to education posed by the economic crisis and the rise in global food prices...

- Human development indicators are deteriorating. An estimated 125 million additional people could be pushed into malnutrition in 2009 and 90 million into poverty in 2010.
- With poverty rising, unemployment growing and remittances diminishing, many poor and vulnerable households are having to cut back on education spending or withdraw their children from school.
- National budgets in poor countries are under pressure. Sub-Saharan Africa faces a potential loss of around US$4.6 billion annually in financing for education in 2009 and 2010, equivalent to a 10% reduction in spending per primary school pupil.

...and develop an effective response:

- Provide up-front, sustained and predictable aid to counteract revenue losses, protect priority social spending and support progress in education.
- Convene a donor pledging conference in 2010 to close the Education for All financing gap.

Reaching the Education for All goals

There has been progress...

- The number of children out of school has dropped by 33 million worldwide since 1999. South and West Asia more than halved the number of children out of school – a reduction of 21 million.
- Some countries have achieved extraordinary advances. Benin started out in 1999 with one of the world's lowest net enrolment ratios but may now be on track for universal primary education by 2015.
- The share of girls out of school has declined from 58% to 54%, and the gender gap in primary education is narrowing in many countries.
- Between 1985–1994 and 2000–2007, the adult literacy rate increased by 10%, to its current level of 84%. The number of adult female literates has increased at a faster pace than that of males.

...but much remains to be done:

- Malnutrition affects around 175 million young children each year and is a health and an education emergency.
- There were 72 million children out of school in 2007. Business as usual would leave 56 million children out of school in 2015.
- Around 54% of children out of school are girls. In sub-Saharan Africa, almost 12 million girls may never enrol. In Yemen, nearly 80% of girls out of school are unlikely ever to enrol, compared with 36% of boys.
- Literacy remains among the most neglected of all education goals, with about 759 million adults lacking literacy skills today. Two-thirds are women.
- Millions of children are leaving school without having acquired basic skills. In some countries in sub-Saharan Africa, young adults with five years of education had a 40% probability of being illiterate. In the Dominican Republic, Ecuador and Guatemala, fewer than half of grade 3 students had more than very basic reading skills.
- Some 1.9 million new teacher posts will be required to meet universal primary education by 2015.

Reaching the marginalized

Governments are failing to address the root causes of marginalization in education. The new Deprivation and Marginalization in Education data set highlights the level of exclusion in eighty countries...

- In twenty-two countries, 30% or more of young adults have fewer than four years of education, and this rises to 50% or more in eleven sub-Saharan African countries.
- In twenty-six countries, 20% or more of young adults have fewer than two years of schooling and, in some countries, including Burkina Faso and Somalia, the share is 50% or more.
- Inequalities often combine to exacerbate the risk of being left behind. In Turkey, 43% of Kurdish-speaking girls from the poorest households have fewer than two years of education, while the national average is 6%; in Nigeria, 97% of poor Hausa-speaking girls have fewer than two years of education.
- Failure to address inequalities, stigmatization and discrimination linked to wealth, gender, ethnicity, language, location and disability is holding back progress towards Education for All.

...and the need to create inclusive education systems:

- Increase access and improve affordability for excluded groups by lowering cost barriers, bringing schools closer to marginalized communities and developing 'second-chance' programmes.
- Improve the learning environment by deploying skilled teachers equitably, targeting financial and learning support to disadvantaged schools, and providing intercultural and bilingual education.
- Expand entitlements and opportunities by enforcing laws against discrimination, providing social protection programmes and redistributing public finance.
- Develop disaggregated data collection systems to identify marginalized groups and monitor their progress.

Meeting the cost of Education for All

The record on aid for education is disappointing...

- Overall aid has been increasing, but commitments are falling short of the US$50 billion increase pledged in 2005. Africa faces the greatest projected shortfall, estimated at US$18 billion.
- Aid to education has been rising, but commitments have recently stagnated. Aid commitments to basic education fell by 22% to US$4.3 billion in 2007.
- Aid to education is not always reaching those who need it most. Some donors continue to give insufficient priority to basic education. Countries affected by conflict are not receiving enough support, undermining prospects for recovery.
- Education lacks a strong multilateral framework for accelerated progress, suffering from a narrow donor base and an absence of funding from private sources.

...donors and recipient governments must both increase resources available to education and improve aid governance:

- Low-income countries could themselves make available an additional US$7 billion a year – or 0.7% of GDP. Even with this effort, large financing gaps will remain. The Report estimates the financing gap to meet the EFA goals in low-income countries at US$16 billion annually.
- Donors should strengthen efforts to implement the Paris agenda on aid effectiveness and review the balance of their support for the different levels of education.
- Donors must also scale up aid to countries affected by conflict, finding innovative ways of providing longer-term, coordinated support.
- The international multilateral framework for cooperation in education needs to be strengthened through fundamental reform of the EFA Fast Track Initiative.
- The United Nations should convene an emergency pledging conference in 2010 to mobilize the additional financing required and to fulfil the Dakar commitment.

- *The environment for pursuing the Education for All goals has deteriorated dramatically.*
- *The economic slowdown has far-reaching consequences for financing of education in the poorest countries.*
- *These countries urgently need an increase in aid to offset revenue losses, sustain social spending and help recovery.*
- *The international response to the financial crisis has so far failed to address the most vital human development concerns.*
- *Education for All financing gaps should be closed under an international human development recovery plan.*

The financial crisis: global impact

XINHUA/Gamma/Eyedea Presse

Chapter 1

Education at risk:

This edition of the *Education for All Global Monitoring Report* comes during the most severe global economic downturn since the Great Depression. Education systems in many of the world's poorest countries are now experiencing the aftershock of a crisis that originated in the financial systems of the developed world. There is an imminent danger that, after a decade of encouraging advances, progress towards the education goals will stall or even be thrown into reverse in the face of rising poverty, slower economic growth and mounting pressure on government budgets. The international community needs to act urgently to avert that danger.

It is easy to lose sight of what is at stake. Ultimately, the world economy will recover from the global recession, but the crisis could create a lost generation of children in the world's poorest countries, whose life chances will have been jeopardized by a failure to protect their right to education.

Double jeopardy: food prices and financial crisis

The economic downturn follows a steep rise in international food prices between 2003 and 2008. The combined effect of this global food crisis and the financial downturn has been to worsen the economic environment for achieving all the 2015 development

Children queue for food in Pakistan: rising prices hit the poor hardest

the impact of the financial crisis

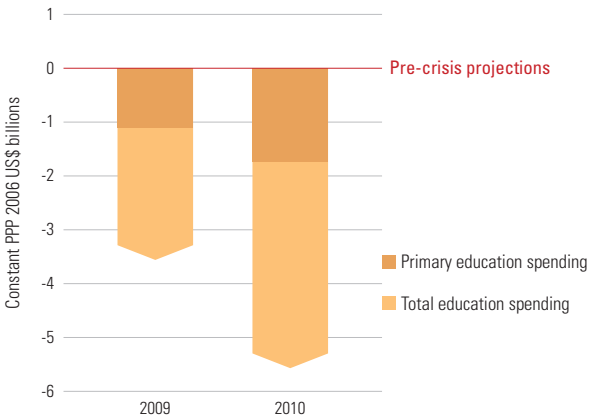
targets, including the Education for All goals. High food prices left an additional 175 million people malnourished in 2007 and 2008. By 2010, the economic recession will have edged another 90 million people into extreme poverty. There are now just over 1 billion people suffering from hunger worldwide.

Widespread malnutrition and deteriorating prospects for reducing extreme poverty have far-reaching consequences for education. With growing unemployment and lower remittances, many poor and vulnerable households are being forced to cut back on schooling or withdraw their children from school entirely. In Bangladesh, for example, about a third of poor households in one survey reported cutting spending on education to cope with rising food prices. Hunger not only threatens lives, but also undermines cognitive development and affects children's future capacity to learn. The East Asia financial crisis in 1997 was marked by major reversals in child health and education. We can learn from these lessons.

Deteriorating prospects for economic growth have far-reaching implications for the financing of education and wider international development goals. While rich countries are showing signs of economic recovery, developing countries are facing slower growth and diminished tax revenues. This in turn will have consequences for national budgets and allocations for education spending.

Growth projections indicate that sub-Saharan Africa faces a potential loss of US$4.6 billion per year in total financing available for education in 2009 and 2010 (Figure 1). This is double the current level of aid to basic education in that region. Spending per pupil in primary school could be as much as 10% lower in 2010 than would have been the case if pre-crisis economic growth projections had been met. These headline figures are likely to translate into reduced spending on teachers, classrooms and programmes that reach the most marginalized.

Figure 1: Education financing in sub-Saharan Africa could suffer from slower economic growth



Source: See Figure 1.3 in the *EFA Global Monitoring Report 2010.*

Widespread malnutrition and deteriorating prospects for reducing extreme poverty have far-reaching consequences for education

Rich country governments have provided only modest support for the world's poorest countries and most vulnerable citizens

Expanding 'fiscal space' – an Education for All priority

Rich countries have been able to put into place large-scale stimulus packages to support recovery and protect public spending. They have invested heavily in programmes aimed at restoring economic growth, protecting vulnerable citizens and maintaining vital social infrastructure. Education has been a priority: for example, the American Recovery and Reconstruction Act (ARRA) earmarks an estimated US$130 billion for education-related expenditure.

Most of the world's poorest countries lack the budget resources to counteract the crisis. For many, increased aid is the only means to increase fiscal space and alleviate budgetary pressures in the short term. It is critical that this aid be delivered before economic pressures convert the financial crisis into a long-term human development crisis. An immediate danger is that without increased aid governments will be unable to implement spending plans linked to targets in basic education.

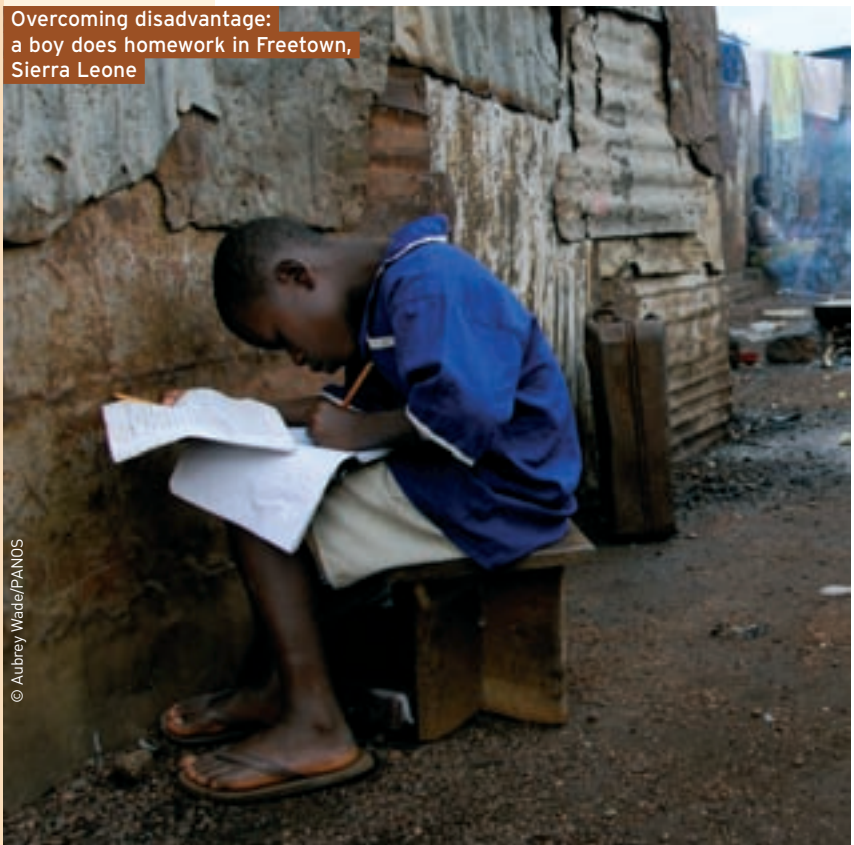
The international response: missing a human dimension

To date, an effective international response to the crisis has been lacking. Rich country governments and successive summits of the G20 and G8 have moved financial mountains to stabilize financial systems, unlock credit markets and boost global liquidity. However, they have provided only modest support for the world's poorest countries and most vulnerable citizens. The limited scale of intervention has been obscured by a 'smoke and mirrors' reporting system. Most of what has been presented as additional aid is in fact reprogrammed or repackaged support. An estimated additional US$2 billion to US$3 billion annually in new and additional finance has been provided for low-income countries as a group, principally through the International Monetary Fund (IMF). This compares with an estimated aid shortfall of US$80 billion per year compared with pre-crisis projections for sub-Saharan Africa in 2009 and 2010. Losses on this scale have far-reaching consequences for financing education and the wider Millennium Development Goals.

The global financial crisis has provided a stark reminder that economic interdependence has a human face. Children in the poorest countries stand to pay for the collapse of Western banking systems by forgoing their opportunity for an education that might lift them out of poverty. Such an outcome is unacceptable and would reinforce a pattern of globalization built on already extreme inequalities.

Action is required at many levels. The following are among the most urgent priorities:

- Convene a *high-level meeting* on Education for All financing in 2010 to elaborate strategies for making more resources available.
- Provide up-front, *sustained and predictable aid* to counteract revenue losses in 2008 and 2009 in order to help developing countries protect and strengthen public financing commitments.
- Implement more effective and up-to-date *monitoring of government budgets*, school attendance and dropout rates by UNESCO together with national education and finance ministries.
- Ensure that *IMF support* is provided on a flexible basis consistent with achieving the Education for All goals, especially concerning the costs associated with teacher recruitment, training and remuneration.
- Increase support to the poorest countries through the World Bank's *International Development Association* facility, backed up by increased donor commitments.
- Make *social protection* through cash transfers, nutrition programmes and targeted support a high priority, to protect vulnerable households from economic shocks and help them keep their children in school.



Overcoming disadvantage: a boy does homework in Freetown, Sierra Leone

© Aubrey Wade/PANOS

Getting there in rural China: minority children have further to go

© Patrick Le Floch/Explorer/Eyedea Illustration

Chapter 2

Progress on the six EFA goals

This chapter monitors progress towards the Education for All goals set under the Dakar Framework, with just five years to go to the target date. Data for 2007, the latest year for which comprehensive figures are available, show that the world is moving in the right direction, with many of the poorest countries registering impressive advances on many fronts. However, progress towards the Dakar goals is far too slow to meet the 2015 targets. An underlying problem is the failure of many governments to extend opportunities to the most marginalized sections of society. Failure to change this picture will result in the international community falling far short of the Dakar pledge.

This chapter also provides an updated analysis of the financing needed to reach key EFA targets. The analysis shows that financing gaps have been underestimated, and that developing country governments and aid donors will have to act with urgency to close these gaps.

Early childhood care and education

Goal 1: Expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children.

The care and education children receive in their earliest years affect the rest of their lives. Effective early childhood care and education (ECCE) can give children a better chance of escaping poverty and overcoming disadvantage. Yet every year millions of children start school carrying the handicap that comes with the experience of malnutrition, ill-health and poverty. Inequitable access to pre-school programmes remains a burden in both rich and poor countries.

Key messages

- *Malnutrition, which affects around 178 million young children each year, is both a health and education emergency.*
- *Improved access to free maternal and child health care is crucial for education as well as for public health. Eliminating user fees is an urgent priority.*
- *Governments need to tackle inequalities in access to early childhood care, especially those based on income and parental education.*

Malnutrition and ill-health: a 'silent emergency' in education

Retarded growth in the womb, early childhood stunting and anaemia have a profound and irreversible effect on a child's ability to learn. Early malnutrition and stunting can lead to long-term damage, including lower cognitive achievement and reduced grade attainment.

Child nutritional and mortality indicators paint a bleak picture of how children are faring around the world today. While there have been some advances towards the Millennium Development Goals of reducing child mortality and malnutrition, achievements fall far short of the goals. There were 9.3 million child deaths in 2008.

Every year millions of children start school carrying the handicap that comes with the experience of malnutrition, ill-health and poverty

Keeping malnutrition in check: an Ethiopian infant gets weighed

Malnutrition is directly implicated in an estimated two of every three deaths of children under five. Around one in three children under 5 – 178 million in total – suffer from severe or moderate childhood stunting.[1] The highest regional rates of stunting are found in Central and Eastern Africa and in South Asia. More than half of the 19 million children with low birth weight are located in South Asia and face a higher risk of early mortality.

Education is one of the strongest antidotes to maternal and child health risks

Maternal health, inadequate nutrition, limited access to skilled health professionals at birth and a failure to make maternal and child health a high priority in national policy are at the root of maternal and infant mortality. An estimated half a million women lose their lives each year from pregnancy and birth-related causes, and 4 million newborns do not survive their first month. Over and above the human costs, the inadequate infant and maternal health care behind these figures can harm cognitive development and lock children into a future of educational difficulties.

Poverty, belonging to an indigenous group or an ethnic minority, and low maternal education all count in reducing access to quality health care. In South Asia, being poor reduces the probability of having a skilled health person in attendance during delivery by a factor of five. In Guatemala, non-indigenous women over twice as likely as their indigenous counterparts to give birth in a public health facility with trained personnel.

Education is one of the strongest antidotes to maternal and child health risks. Women with higher levels of education are more likely to delay and space pregnancies, and to seek health care. In South and West Asia, only 10% of women with secondary education gave birth with no antenatal care, compared with almost half of women with no education (Figure 2).

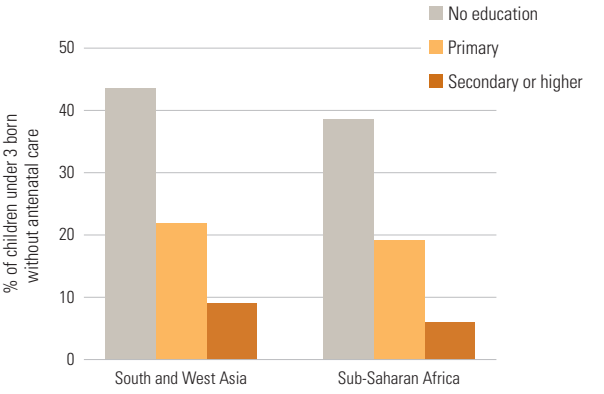
Policies that enable rapid progress in maternal health, child nutrition and survival exist, even in some of the world's poorest countries. Linking health and education agendas is crucial. Other policies include scaling up maternal and child health services, aid-based health initiatives, free health care, putting nutrition at the centre of the poverty reduction agenda and large-scale social protection programmes that include child nutrition. To make such initiatives available, countries need to develop affordable and accessible health systems, allied to wider measures for targeting vulnerable groups.

Early childhood education programmes: a mixed record

Participation in pre-primary education has been steadily increasing since the Education for All goals were established in 2000. Some 140 million children were enrolled in pre-school programmes worldwide in 2007, up from 113 million in 1999. The gross enrolment ratio (GER) climbed from 33% to 41% over the same period, with the most pronounced increases in sub-Saharan Africa, and South and West Asia, albeit from a low base.

Looking beyond the regional data reveals a diverse array of country experiences. Of the countries with data, seventeen states in sub-Saharan Africa have GERs under 10%. Although the Arab States are wealthier, fourteen countries out of the nineteen with data have GERs below 50%. Egypt and Saudi Arabia have lower levels of coverage than some far poorer countries, including Nepal and the United Republic of Tanzania. Sub-Saharan Africa has increased enrolment at three times the rate of the Arab States, with several countries, including Burundi, Liberia and Senegal, increasing GERs by more than 20% since 1999.

Figure 2: Educated mothers have better access to antenatal care



Source: See Figure 2.3 in the *EFA Global Monitoring Report 2010.*

1. Stunting, or low height for age, is caused by long-term insufficient nutrient intake and frequent infections. It generally occurs before the age of 2 and the effects are largely irreversible.

Although GERs in developed countries are high, access and duration vary widely across and within countries. Scandinavian countries have high rates of coverage for children under 3, while other OECD countries cover ages 4 to 6. Most European Union countries offer two years of free pre-primary school. In the United States, some states provide full coverage for 4-year-olds, while others have no regular pre-school education programme.

Reaching the vulnerable and excluded

Evidence from around the world indicates that high-quality early childhood care is good for all children, above all for those from disadvantaged backgrounds. But those who stand to gain the most from early childhood care are often excluded. Children who grow up in poverty or whose mothers have no formal education are far less likely to participate in early childhood programmes. Living in one of Zambia's poorest households cuts the chance of access to early childhood care by a factor of 12 compared with a child in the wealthiest households, rising to a factor of 25 in Uganda and 28 in Egypt. Physical distance from facilities and unaffordable school fees are some of the other barriers faced by disadvantaged households.

Rich countries have also struggled to meet equity goals. There is extensive evidence from the European Union and the United States that low-income families and immigrants have less access to good quality early childhood care.

Some countries have made the expansion of early childhood programmes a national priority, especially for reaching disadvantaged groups. Chile has initiated a national child development strategy centred on health and education. It aims to reach all children under 5, with a particular focus on those from the poorest 40% of households. In New Zealand, efforts have also been made to improve the quality of early childhood education available to indigenous Māori children. In the five years ending in 2007, the number of Māori educators increased threefold and the share of Māori primary school entrants who had attended pre-school rose from 86% to 91%.

Governments need to recognize the potential efficiency and equity gains from investing in early childhood care. Public investment should be geared towards narrowing disparities, targeting marginalized groups and providing good quality services that are accessible to the poor.

Universal primary education

Goal 2: Ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities, have access to and complete, free and compulsory primary education of good quality.

The past decade has seen rapid progress towards universal primary education. Some of the world's poorest countries have dramatically increased enrolments, narrowed gender gaps and extended opportunities for disadvantaged groups. However, millions of children are still out of school and millions more drop out before completing primary education. The 2015 goal of ensuring all children enter school and complete a full cycle of primary education is only just still in reach, but it will require governments to take bold decisions over the next two years, especially in the current economic climate.

There are still 72 million children out of school

Key messages

- *There has been encouraging progress in many countries, with out-of-school numbers dropping by 33 million worldwide since 1999.*
- *While numbers are dropping, there are still 72 million children out of school. On current trends, 56 million children will still be out of school in 2015.*
- *While there has been progress towards greater gender parity in school enrolment, gender barriers remain deeply entrenched.*
- *Getting children into primary school is just the first of many hurdles: millions of children enter school late, drop out early and never complete a full cycle.*
- *Out-of-school adolescents are often overlooked: there are 71 million children of lower secondary school age currently out of school.*

Numbers of out-of-school children are declining, but not fast enough

The first decade of the twenty-first century has seen out-of-school numbers falling and more children completing primary school. Yet the sheer number of primary school age children still out of school – an estimated 72 million – remains an indictment of national governments and the entire international community (Box 1). An estimated 44% of out-of-school children in developing countries are unlikely ever to enrol and will face the most acute educational disadvantage.

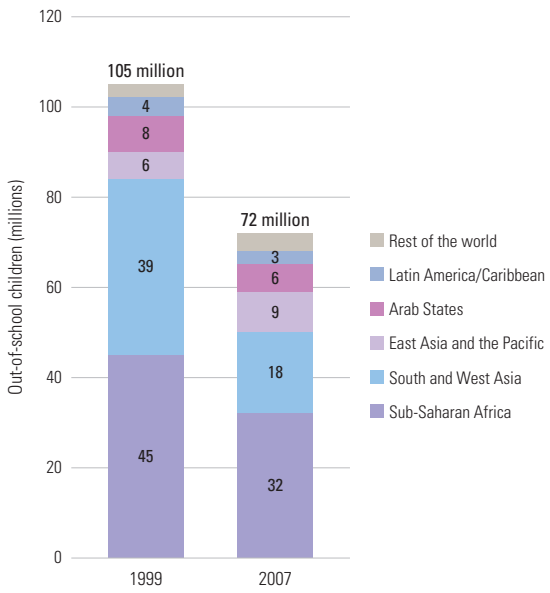
Box 1: Children out of school: a global snapshot

The snapshot for 2007 of the primary school age population not in school points to continued progress but continuing large deficits.

Positive achievements since 1999:

- *Out-of-school numbers* globally fell by 33 million from 105 million in 1999 to 72 million in 2007. (Figure 3).

Figure 3: Numbers of out-of-school children are declining, but too slowly



Source: See Figure 2.7 in the *EFA Global Monitoring Report 2010.*

- *The proportion of girls* in the out-of-school numbers has declined from 58% to 54%.
- *South and West Asia* more than halved their out-of-school population – a reduction of 21 million – and reduced the proportion of girls out of school.
- *Sub-Saharan Africa* has reduced its out-of-school population by almost 13 million, or 28%.

But the world is still off track:

- *The 2015 target will be missed*. If the world were to continue at the same rate, there would still be an estimated 56 million children out of school in 2015.[1]
- *Progress has slowed*. Two-thirds of the total decline in out-of-school numbers took place between 2002 and 2004, when numbers dropped by 22 million. In the three subsequent years, the decline was less than 8 million.
- *Most of the progress took place in South and West Asia*. India reported about 15 million fewer out-of-school children between 2001 and 2004.
- *The deficit in sub-Saharan Africa remains large*. A quarter of the region's primary school age children were out of school in 2007. Half of the twenty countries with more than 500,000 out-of-school children are in sub-Saharan Africa.
- *Conflict remains a major barrier to school*. Best estimates suggest that more than 25 million out-of-school children live in low-income countries affected by conflict – around 35% of the global total.
- *Numbers of children out of school may be underestimated*. Evidence from household surveys suggests that official data may understate out-of-school numbers by as much as 30%.

1. This figure should not be compared with the partial projection in the 2009 *Education for All Global Monitoring Report*, which was applied to a smaller group of countries.

Numbers of children out of school may be underestimated, with a potential shortfall in global estimates of about 30%

Identifying who is out of school is crucial for public policy design, as is an understanding of which children start school late, which of them drop out and which of them never set foot inside a school at all. Girls, and children from poor households and rural areas all face a much greater risk of being out of school. These three categories interact with each other and with additional factors – such as language, ethnicity and disability – to create multiple barriers to school entry and survival. Young girls accounted for 54% of the global out-of-school population in 2007. The proportion of out-of-school girls is highest in the Arab States, Central Asia and South and West Asia.

Enrolment of school age children is growing too slowly

Most of the developing countries that started the current decade a long way from universal primary enrolment have made significant strides. Since 1999, South and West Asia and sub-Saharan Africa have increased net enrolment ratios at three and five times the rate of the 1990s, reaching 86% and 73% respectively. Their progress is evidence that the Dakar goal can be achieved. Developed countries and countries in transition are close to universal primary education.

Overall progress towards universal primary enrolment masks more complex national situations. Countries are moving forward at different rates, some are not moving, others are moving backwards. Several of the world's poorest countries have achieved extraordinary advances. Benin started out in 1999 with one of the world's lowest net enrolment ratios but could now be on track for universal primary enrolment by 2015 (Box 2). Other countries with low enrolment rates and large out-of-school populations – notably Nigeria – are moving in the right direction, but at a snail's pace. Some thirty developing countries with data experienced stagnating or declining net enrolment ratios between 1999 and 2007.

Overcrowded and under-resourced: a classroom in Malawi

© Louise Gubb/Corbis

Getting girls into school demands concerted action and political leadership to change attitudes and household labour practices

Box 2: Benin: on the right track, but tackling marginalization is a priority

Benin has been among the world's fastest moving countries on primary enrolment, with the net enrolment ratio rising from 50% in 1999 to 80% in 2007. The gender gap also narrowed, going from just 67 girls to every 100 boys in school in 1999 to 83 girls in 2007. On current trends, Benin could achieve universal primary education (UPE) by 2015. Maintaining the trend will be difficult, however. Rapid progress in enrolment has brought new policy challenges, such as raising completion rates, reducing regional disparities and tackling poverty. The government has already made strong budget commitments. To ensure Benin is able to go the final mile toward universal primary education, international aid needs to back the national financing commitment.

Many of these are either suffering from or recovering from conflict, such as Liberia or the Palestinian Autonomous Territories.

Gender parity: some progress but a long way to go

The expansion of primary education has gone hand in hand with progress towards greater gender parity, but there are marked differences across and within regions.

In countries starting with low levels of enrolment in 1999, such as Burkina Faso, Ethiopia and Yemen, moves towards gender parity from a low starting point have helped generate large increases in primary enrolment. However, twenty-eight countries have fewer than 90 girls in school per 100 boys; eighteen of these are in sub-Saharan Africa. There are also marked gender disparities in the Arab States, and South and West Asia: in Afghanistan there are 63 girls in school for every 100 boys.

With some of the world's largest gender gaps, several countries in West Africa have adopted policies aimed at strengthening parity within the wider strategy for achieving universal primary education. The policies behind these gains include changing attitudes to girls' and women's place in society, offering financial incentives for school participation, providing water and sanitation in schools, recruiting female teachers and increasing their deployment to rural areas, and gender sensitization training of teachers. In remote rural areas, where distance to school is often a major security concern for girls' parents, governments are attempting to bring classrooms closer to communities, often by building satellite schools.

Getting girls into school demands concerted action and political leadership to change attitudes and household labour practices. Keeping them in school once they reach puberty poses another layer of challenges, especially in countries where early marriage is common and girls' disadvantage interacts with other aspects of marginalization such as poverty or ethnicity. Countries such as Bangladesh and Cambodia have demonstrated that financial incentives can both increase the likelihood of girls entering lower secondary school and raise demand for primary schooling.

Conversely, in a small number of developing countries, girls' enrolment outstrips that of boys. In some cases this is because demand for boys' labour is higher than for girls. To take one example, poor rural families in highland areas of Lesotho often rely on boys to herd cattle, a practice that leads to high dropout rates after Grade 3.

Going the final mile: some countries with high net enrolment face problems

Some countries are not performing as well as might be expected given their levels of wealth. In the Philippines, the number of out-of-school children aged 6 to 11 reached 1 million in 2007, 100,000 more than in 1999. The net enrolment ratio in Turkey has remained unchanged at about 90% since the beginning of the decade. Both countries face problems of deeply entrenched marginalization.

Nearly 71 million adolescents were out of school in 2007, almost one in five of the total age group

In the Philippines, marginalization is strongly associated with poverty and location: the Autonomous Region of Muslim Mindanao, which suffers heavily from poverty and conflict, falls far behind. In Turkey, disadvantage is concentrated among children in poor households and young girls in rural areas, especially in the east. In these two countries current policies are not breaking down inherited disadvantage.

From enrolment to completion and beyond: a difficult journey, hard to measure

For millions of children entering primary school, the journey through the education system is often delayed, hazardous and short-lived. In half of the countries in sub-Saharan Africa, and South and West Asia, almost one in three children entering primary school drop out before completion. In both regions many do not even get past the first hurdle. In 2006, 13% of pupils in South and West Asia and 9% in sub-Saharan Africa dropped out before completing the first grade. In Nicaragua, 67% of children of the official starting age entered school in 2006, but only around one-quarter made it through to completion (Figure 4).

Current monitoring tools do not provide an integrated way of measuring the three things that count in progress towards universal primary education: entering school at an appropriate age, progressing smoothly through the system and completing school. The Report sets out the case for a more comprehensive approach based on the net cohort completion rate.

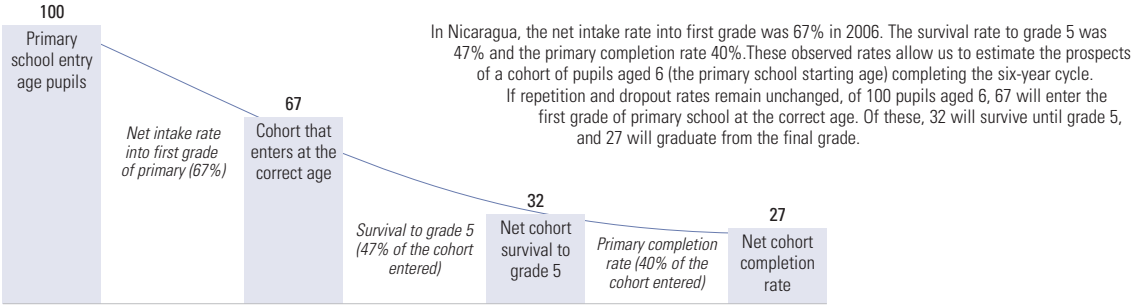
Out-of-school adolescents

The focus on out-of-school children of primary school age has deflected attention from a wider problem. Many children of lower secondary school age are also out of school, either because they have not completed primary school or because they were unable to make the transition to lower secondary school. Nearly 71 million adolescents were out of school in 2007, almost one in five of the total age group. The problem is widespread in sub-Saharan Africa, with 38% of adolescents out of school, and in South and West Asia, with 28%. As with primary school age children, adolescent girls are more likely than boys to be out of school. Globally, 54% out-of-school adolescents in 2007 were girls.

The transition from primary to lower secondary school is difficult for many children. Barriers at the primary level are often magnified at the secondary level, including cost, distance to school, labour demands and – especially in the case of girls – deeply ingrained social, cultural and economic barriers. In Mauritania and Senegal, the average journey to the closest secondary school is eighty minutes in rural areas; in Senegal it is twenty-five times farther than that to the nearest primary school. Distance can compound the effects of poverty, with poor households often unable to cover the costs of transport or afford boarding-school places.

The transition to lower secondary education is now at the centre of the Education for All agenda in many countries. As more children start and progress through primary school, demand for secondary school places is growing. But it is important for both governments and donors to avoid a premature shift in policy priorities. With millions of children still excluded from primary education and the world off track for the 2015 goals, expanding secondary schooling should not be at the expense of providing quality primary education.

Figure 4: The difficult journey through primary school: the example of Nicaragua



Source: See Figure 2.22 in the *EFA Global Monitoring Report 2010.*

Youth and adult skills – expanding opportunities

Goal 3: Ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life-skills programmes.

In the knowledge-based global economy, learning and skills play an increasingly important role in shaping prospects for economic growth, shared prosperity and poverty reduction. Yet since 2000 the third EFA goal has suffered from quiet neglect.

Key messages

- *Rising youth unemployment represents a growing global challenge.*
- *Governments, trade unions and employers need to devise effective vocational education that gives youths the skills they need for success in employment.*
- *For skills to be relevant and provide a successful transition from school to work, vocational programmes must be responsive to labour market demands.*
- *Governments need to strengthen basic education and ensure that youths reach secondary level to create the foundations for successful vocational programmes.*
- *Governments in low-income countries need a stronger focus on the informal sector and 'second chance' provision.*

The global economic crisis has pushed learning and skills up the political agenda. Youth unemployment is rising from already high levels: the projected rate for 2009 is between 14% and 15%, compared with 12% in 2008. Governments across the world now face the challenge of providing immediate support to the vulnerable while equipping people with the skills they need to re-enter labour markets.

The place of vocational training in secondary and tertiary education

Participation in technical and vocational education has increased alongside the expansion of secondary education. Developed countries have achieved near-universal secondary education, while progression into tertiary education has also increased, with the gross enrolment ratio reaching 67% in 2007. Poorer regions are catching up at a variable pace. Secondary gross enrolment levels range from 34% in sub-Saharan Africa to 65% in the Arab States and 90% in Latin America. Tertiary level enrolment is just 6% in sub-Saharan Africa, compared with 22% in the Arab States and 35% in Latin America.

In developed countries, about 16% of secondary school students enrolled were in technical and vocational education in 2007, compared with 9% in developing countries. Enrolment rates were lowest in secondary schools in sub-Saharan Africa (6%) and South and West Asia (2%). Wide variation existed between countries in both rich and poor regions.

Female students are often under-represented in technical and vocational education. In South and West Asia, and sub-Saharan Africa, girls accounted for 44% of pupils in secondary school in 2007 but only 27% and 39% respectively of pupils in vocational education. In nine of the eleven Arab states with data, girls accounted for less than 40% of vocational enrolment. Gender inequality doesn't end with enrolment. In many cases, young girls in these streams are being trained for professions characterized by low pay.

Good intentions, poor results: problems in the developing world

In many developing countries, technical and vocational education has suffered from a combination of under-financing, poor design, negative parental attitudes and weak links to employment markets. The experience of regions differs greatly.

In the Middle East, a region marked by high youth unemployment – about 20% of youths are out of work – governments have identified technical and vocational education as a priority. Yet vocational education suffers from problems such as poor government coordination, meagre budget resources, a lack of qualified teachers, curricula bearing little relation to the skills sought by employers and a lack of uniform standards. There are some notable exceptions. In Egypt, innovative partnerships are bringing together governments, business and donors. Morocco has adopted far-reaching governance reforms aimed at improving quality, relevance and equity. However, the overall record remains poor.

In sub-Saharan Africa, governments face some of the toughest challenges in reforming technical and vocational education. Problems such as high per capita costs, underinvestment, low wages and lack of qualified staff are rife. Students are tracked into vocational streams too early and graduates still face unemployment. Moreover, studies in Burkina Faso, Ghana and the United Republic of Tanzania reveal that marginalized groups are the least likely to benefit

The global economic crisis has pushed learning and skills up the political agenda

The Jóvenes programmes have been particularly successful in reaching the marginalized, effectively linking employment with skills training

from vocational education programmes. Some positive new strategies are emerging, however, including in Cameroon, Ethiopia and Rwanda. As in other regions, governments in sub-Saharan Africa have to strike a balance between general, and technical and vocational education. The overwhelming priority should be to increase enrolment, retention and progression through basic education into secondary school. Vocational education could play a far greater role, however, in providing second-chance opportunities to marginalized youth.

Offering young people a second chance

To effectively combat marginalization, technical and vocational education programmes must look beyond schools and formal education. They must also offer a 'second chance' to the millions of youths in rich and poor countries who were denied opportunities for education earlier in their lives.

Evaluations around the world show that 'second chance' programmes can make a difference. Comprehensive approaches that provide training as part of a wider package of skills and support are more likely to succeed. The Jóvenes programmes in countries such as Argentina, Chile, Peru and Uruguay have been particularly successful in reaching the marginalized, effectively linking employment with skills training. While this demonstrates what is possible, second-chance education remains a neglected area, and is often excluded from mainstream education, with little government coordination.

Programmes that deliver results

The success of technical and vocational education programmes is highly variable, and also depends on conditions outside the education sector. Some of the important lessons to be drawn include the need to:

- Reinforce the links between education and labour markets.
- Recognize that past achievements are no guarantee of future success, and that governments must adapt and renew vocational programmes in the light of changing circumstances.
- Avoid separating vocational education from general education by rigid tracking into vocational streams, especially at an early age. In today's knowledge-based society, 'what you know' is less important than 'what you are able to learn'.
- Develop capability-based national qualification systems involving the private sector, that allow training to be used for transferable credits into technical and general education.
- Integrate vocational programmes into national skills strategies, aligned with the needs of high-growth sectors.

No government can afford to ignore the role of skills and learning in supporting economic growth, combating poverty and overcoming social marginalization. Governments and the international community urgently need to develop meaningful benchmarks for measuring progress and policies for achieving greater equity.

Aid to disadvantaged families can help get working children back into school, the Philippines

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Adult literacy

Goal 4: Achieving a 50% improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults

Key messages

- *Despite steady progress, about 759 million adults lack literacy skills today. Two-thirds are women.*
- *While gender parity is improving, women and other disadvantaged groups are still being denied their right to literacy.*
- *Unless more is done to accelerate progress, an estimated 710 million adults will still be illiterate in 2015.*
- *More rapid progress remains possible, through successful policies and targeted programmes.*

When people emerge from their school years lacking basic literacy and numeracy skills, they face a lifetime of disadvantage with diminished social and economic prospects. Society as a whole suffers from lost opportunities for higher productivity, shared prosperity and political participation. Eradicating illiteracy is one of the most urgent development challenges of the twenty-first century.

The post-Dakar progress report

An estimated 759 million adults lack literacy skills today, around 16% of the world's adult population. Nearly two-thirds are women. The global headcount for illiteracy is dominated by a small group of large-population countries (Figure 5). Over half of illiterate adults live in just four countries: Bangladesh, China, India and Pakistan.

In both South and West Asia, and sub-Saharan Africa, more than one in three adults is illiterate. In the Arab states, the proportion is nearly one-third. In four countries in sub-Saharan Africa – Burkina Faso, Guinea, Mali and Niger – the rate rises to 70%. Gender disparities are a major source of high adult illiteracy rates in all three regions: in Afghanistan, for instance, 87% of adult women and 57% of men were illiterate in 2000.

Rich countries also have significant pockets of low literacy. In England, for example, 1.7 million people (5% of those aged 16 to 65) perform below the level expected of 7-year-olds on the national curriculum test, and 5.1 million perform below the level expected of 11-year-olds.

Continuing education in Lebanon: learning empowers at all ages

© REUTERS/Zohra Bensemra

Adult literacy rates have been rising with every school generation, thanks to improved schooling and literacy programmes. Between the periods 1985–1994 and 2000–2007, the number of adult illiterates in the world fell by 13% and the literacy rate increased by 10%, currently standing at 84%. Almost all the improvement took place in East Asia and the Pacific, with striking progress in both China and India. In the country with the highest number of illiterates, India, literacy rates moved from just under half of the adult population to above two-thirds. Burkina Faso and Chad, with some of the world's lowest literacy rates, have respectively doubled and almost tripled their rates. However, on current trends, an estimated 710 million adults – about 13% of the world's adults – will still lack basic literacy skills in 2015.

An estimated 759 million adults lack literacy skills today

Gender parity is improving but other disadvantages remain

Rising literacy has been accompanied by declining gender disparities. Gender parity improved in all but eight of the seventy-nine countries with data. In Bangladesh, Burkina Faso, Burundi, Malawi, Nepal and Yemen, female literacy rates doubled or tripled, increasing twice as fast as male rates. Between the two benchmark periods (1985-1994 and 2000-2007), the number of adult female literates increased by 14%, compared with 7% for males. Women are catching up, though in many countries they are starting from a long way behind.

Figure 5: Adult illiteracy is heavily concentrated in a small group of large-population countries

Adult (15 and over) illiterates, millions

Source: See Figure 2.29 in the *EFA Global Monitoring Report 2010.*

Since 2003, the Literate Brazil Programme has provided literacy training to about 8 million learners over the age of 15

The disadvantage suffered by women is not the only source of inequality within countries. Adult illiteracy interacts with poverty, geographic location, parental education, ethnicity, language and disability. For example, in Guatemala, 60% of adults living in extreme poverty are illiterate, compared with 17% of richer adults. Minority language groups and indigenous populations often register far lower levels of literacy. In Viet Nam, the literacy rate is 94% among the majority Kinh population but only 72% for ethnic minorities. Illiteracy tends to be higher in poorer regions, rural areas and slums.

Changing the trend: making the literacy decade count

Overall progress towards the literacy goal set out at Dakar has been disappointing. Combating illiteracy has not been seen as a high political priority, financial commitments have been inadequate and efforts to incorporate strategies for literacy into wider poverty reduction plans remain underdeveloped.

There are, however, encouraging signs. Several countries with large numbers of illiterate adults are increasing investment in national literacy programmes. Since 2003, the Literate Brazil Programme (Programa Brasil Alfabetizado) has provided literacy training to about 8 million learners over the age of 15. India is reconfiguring and expanding its National Literacy Mission. With a budget of US$21 billion, it combines initial literacy training with ongoing post-literacy courses, with a commitment to preparing literacy materials in local languages. In the Islamic Republic of Iran, community learning centres initiated by the Literacy Movement Organization, a government agency, have enrolled 3.1 million illiterates between 2000 and 2006 in basic education courses.

Far more has to be done to accelerate progress towards the literacy goals. Governments across the world need to show stronger political leadership and attach more weight to literacy in national planning. Illiteracy imposes huge costs on society and the economy, and investments in literacy have the potential to generate large returns in both areas.

The quality of education

Goal 6: Improving all aspects of the quality of education and ensuring excellence of all so that recognized and measurable learning outcomes are achieved by all, especially in literacy, numeracy and essential life skills.

Key messages

- *School quality varies widely across countries and absolute levels of learning are very low in many poor countries.*
- *Disparities in learning tend to be much wider in low-income countries, pointing to the importance of policies for equalizing opportunity.*
- *Gaining effective reading skills in the early grades of primary school is crucial for success in school and beyond*
- *Ensuring that there are adequate, well-motivated and trained teachers is vital for effective learning.*
- *Some 1.9 million new teacher posts will be required to achieve universal primary enrolment by 2015.*

Millions of children are emerging from school each year without having acquired basic literacy and numeracy skills. Policy-makers, educators and parents need to focus far more on the core purpose of education: ensuring that children acquire the skills that shape their future life chances.

The learning gap: from global to local

International learning assessments point to two persistent challenges: wide global inequalities in learning achievement and low absolute levels of learning in many poor countries.

The latest TIMSS[2] study on maths and science skills confirms these global inequalities. Average test scores in maths for eighth grade students in the Republic of Korea, the top-performing country, were twice as high as for students in Ghana, at the bottom of the international distribution. Put differently, the average student in Ghana, Indonesia or Morocco figures alongside or below the poorest-performing 10% of students in higher-performing countries. In the fourth grade of primary school, almost all students in Japan had at least intermediate levels of proficiency in mathematics, while in Yemen almost no children scored above that level.

2. Third International Mathematics and Science Study (TIMSS, 2007).

In the Hindu Kush, Pakistan, a traditional Kalash storyteller captivates his audience

Low-income countries are covered poorly by international learning assessments, but there is no shortage of evidence pointing to acute problems. Regional assessments conducted by SACMEQ in sub-Saharan Africa show that in many countries over half of primary grade 6 students failed to achieve basic levels of numeracy. In rural Pakistan, a recent survey found that only two-thirds of third grade students could subtract single-digit numbers. In rural India, just 28% of grade 3 students could subtract two-digit numbers and only a third could tell the time.

Disparities in learning within countries

An equal opportunity to learn is no less a human right than an equal entitlement to be in school, regardless of parental income, gender, language or ethnicity. However, in many countries large disparities in learning achievement exist and are heavily influenced by the type of school students attend and their family backgrounds.

Differences between schools play a critical role in the level of equity within education systems. In many developing countries, education systems are often marked by large variations across schools in class size, availability of books and teaching materials, teacher quality and school building standards. Improving school quality and narrowing differences between schools will reduce inequality in student performance. In the mid-1990s, Brazil introduced the FUNDEF programme to ensure a more equitable distribution of per-student spending across the country. Preliminary evidence suggests that this redistributive policy has narrowed learning inequalities.

School-based disparities do not operate in isolation. In many cases they interact with and reinforce wider disadvantage. Parental income and education, home language and other factors are all strongly associated with learning achievement. In Pakistan, children from the richest third of the population scored on average between one-quarter and one-half of a standard deviation higher than children from the poorest households. In Peru, sixth-grade pupils whose mother tongue was Spanish scored more than one standard deviation higher in a mathematics assessment than children who spoke an indigenous language.

In countries with more equitable systems, children's backgrounds are less important in determining achievement. Where there is a strong relationship between student background and performance, or where large differences in student backgrounds exist, reducing differences in school quality is unlikely to be enough to improve equity significantly. Targeted programmes to improve learning among children who are being left behind will also be needed.

In many countries, girls are less likely than boys to get into school. Once in school, though, they tend to perform as well as, or better than, their male classmates. Where differences in achievement do exist they are small and tend to show that girls do better in languages and boys in mathematics and science. Eliminating remaining gaps will be necessary if the Education for All goals are to be achieved.

In rural Pakistan, a recent survey found that only two-thirds of third grade students could subtract single-digit numbers

Children who have difficulties with basic reading and comprehension skills in early grades are likely to struggle throughout their school career

Teaching reading in the early primary grades

Teaching children to read in the early grades of primary school is crucial for learning. Children who have difficulties with basic reading and comprehension skills in early grades are likely to struggle throughout their school career. Small-scale reading assessments conducted in several low-income countries paint a worrying picture. In Ethiopia, a 2008 study of grade 3 students in Woliso district found that 36% could not read a single word in Afan Oromo, the local language. Assessing reading skills early in primary school provides an opportunity to identify children with low learning achievement and take remedial measures. Evidence from several countries demonstrates that policy interventions can make a difference. In Uttar Pradesh, India, one programme operated by a non-government organization (NGO) has used 'remedial reading camps' run by volunteer trainers to achieve notable improvements in early reading.

Improving learning in schools

Low achievement levels are often associated with a poor physical environment. One of the most important requirements for sustained improvement in education quality is an improved learning environment. Badly ventilated classrooms, leaking roofs, poor sanitation and lack of materials are significant barriers to effective learning in many schools. A recent survey in two Nigerian states found that over 80% of classrooms in Enugu and 50% in Kaduna either had no blackboard or had one that was barely usable.

The longer children spend in school over the course of a year, the greater their opportunity to master the curriculum and achieve learning objectives. In effective classrooms, about 80% of class time is spent on learning, a benchmark that many schools in developing countries fail to meet. In Ethiopia and Guatemala, a recent study found that children were in class and learning for a third of the time schools were officially open. Better monitoring, improved teacher incentives and targeted support for students struggling to attend regularly can all increase learning time and performance.

The crucial role of teachers

Teachers are the single most important education resource in any country. In many countries, shortages of trained teachers remain a major barrier to achieving the Education for All goals, especially among marginalized groups.

Higher primary school enrolment since 1999 has gone hand in hand with an increase in the recruitment of primary teachers. Many countries in sub-Saharan Africa have more than doubled the teacher workforce and improved pupil/teacher ratios.

Despite the progress of the past decade, teacher shortages remain a concern. In primary education, twenty-six countries exceeded the widely used international benchmark for the pupil–teacher ratio (40:1) in 2007, all but four of them in sub-Saharan Africa. There are also concerns over the ratio of pupils to trained teachers. Countries including Madagascar, Mozambique, Sierra Leone and Togo had ratios in excess of 80:1.

National average pupil–teacher ratios can conceal large disparities. Trained teachers and female teachers are concentrated in urban areas. In Uganda and Zambia, the share of female teachers in urban primary schools was 60%, compared with 15% to 35% in rural areas.

Projected teacher requirements to 2015

Future teacher recruitment needs vary greatly by region. This year's report estimates that 10.3 million additional teachers will be needed worldwide to achieve the goal of universal primary education by 2015. Of these, 8.4 million will be needed to replace teachers expected to retire or leave their posts before 2015, and a further 1.9 million new teacher posts will need to be created. Two-thirds of the additional posts – around 1.2 million – will be needed in sub-Saharan Africa.

In many of the world's poorest countries, the problem is not just low teacher numbers but also poor teacher morale and insufficient training. Many teachers are forced to take on extra jobs to supplement their salaries. Governments and donors need to ensure that teachers' pay and conditions reflect a commitment to delivering good quality education through a qualified and motivated work force.

The Education for All Development Index

While each of the six Education for All goals matters in its own right, the commitment undertaken by governments in 2000 was to sustain advances on all fronts. The Education for All Development Index (EDI) provides a composite measure of overall progress, including the four most easily quantifiable EFA goals: UPE, adult literacy, gender parity and equality, and education quality. For this report, it was possible to calculate the EDI for 128 countries with data on these four goals for the school year ending in 2007.

Of the 128 countries included:

- Sixty-two countries – six more than in 2006 – have either achieved the four goals or are close to doing so, with EDI values of 0.950 or above. In addition

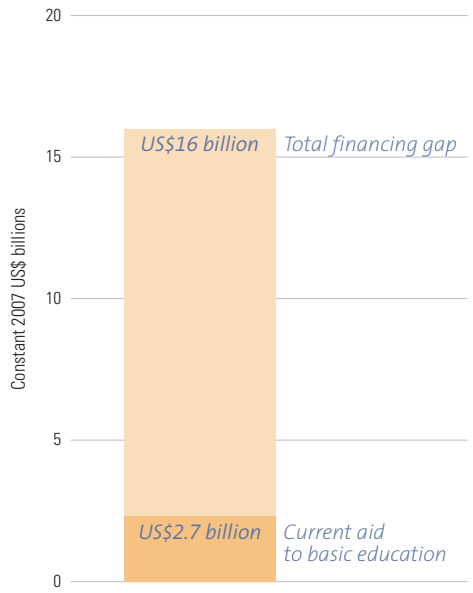
The Education for All financing gap

Achieving the Education for All goals in low-income countries will require a major increase in financing. These countries themselves can do a great deal to mobilize more resources for education. But in the absence of a significant increase in aid, efforts to accelerate progress in basic education will be held back by a large financing gap.

This Report provides a detailed assessment of the costs associated with achieving some of the core Education for All goals. Covering forty-six low-income countries, the assessment includes estimates for improved coverage in early childhood programmes, universal primary education and adult literacy. Unlike previous global costing exercises, it includes a provision for reaching the most marginalized. That provision is crucial because it costs more to extend opportunities to children disadvantaged by poverty, gender, ethnicity, language and remoteness. Among the central findings and recommendations:

- Low-income developing countries could make available an additional US$7 billion a year – or 0.7% of GDP – by raising more domestic resources and making national budgeting more equitable.
- Even with an increased domestic resource mobilization effort, there will be a global Education for All financing gap of around US$16 billion annually – 1.5% of the GDP of the countries covered.
- Sub-Saharan Africa accounts for around two-thirds of the global financing gap, or US$11 billion.
- Special measures to extend primary school opportunities to marginalized groups will cost US$3.7 billion.
- Current aid to basic education for these forty-six low-income countries – around US$2.7 billion – falls short of what is required. It would have to increase six-fold to close the US$16 billion financing gap (Figure 6).
- An emergency pledging conference should be convened in 2010 to mobilize the additional financing required to fulfil the Dakar commitment.

Figure 6: Aid to basic education would have to increase six-fold to close the US$16 billion financing gap



Source: See Figure 2.49 in the *EFA Global Monitoring Report 2010.*

to high-achieving countries in North America and Europe, the list includes countries from all other regions except sub-Saharan Africa.

- Thirty-six countries, mostly in Latin America and the Caribbean (sixteen), sub-Saharan Africa (eight) and the Arab region (six), are midway to achieving EFA, with values ranging from 0.80 to 0.94. Most of these countries have a mixed progress report: while school participation is often high, deficits remain in adult literacy and education quality.

- Thirty countries, seventeen of them in sub-Saharan Africa, have low EDI values, below 0.80. Other countries in this category include highly populated countries such as Bangladesh, India and Pakistan. Very low EDI values (below 0.60) are reported in Ethiopia, Mali and the Niger. Most countries at low levels of EFA achievement face multiple challenges: school participation is low, quality is poor, adult illiteracy is high and gender disparities are marked.

It was possible to analyse changes in the EDI from 1999 to 2007 for forty-three countries. The EDI increased in thirty out of these, with particularly large gains in some, including Ethiopia, Mozambique, Nepal and Zambia, where in each case the EDI went up by more than 12%. Expansion of primary school participation is the main reason for the increase in the EDI since 1999: the average increase in the primary school adjusted net enrolment ratio was 8.7%. Not all countries have been moving in the right direction: the EDI is decreasing in thirteen, including the Dominican Republic and Fiji.

Current aid to basic education would have to increase six-fold to close the US$16 billion financing gap

- *Many governments are failing to act decisively in tackling marginalization in education, holding back progress towards the Education for All goals.*
- *Poverty and gender inequalities magnify other disadvantages, and close doors to education opportunity for millions of children.*
- *Inclusive education policies need to tackle accessibility, affordability and the learning environment for disadvantaged groups, within an integrated poverty-reduction framework.*
- *Disaggregated data can help identify marginalized groups and help monitor progress towards equity.*

Chapter 3

Reaching the marginalized

Overcoming marginalization in education should be a high policy priority for all governments

Almost all governments endorse the principle of equal opportunity in education. They recognize that restricting access to education violates human rights, reinforces social inequalities and holds back economic growth. In the Dakar Framework for Action, governments pledged to 'explicitly identify, target and respond flexibly to the needs and circumstances of the poorest and the most marginalized', or extreme and persistent disavantage. Many are failing to act on this commitment.

Failure to address the structural disparities and unequal power relationships linked to wealth, gender, ethnicity, language, disability and other markers of disadvantage is holding back progress towards Education for All and fuelling wider processes of social exclusion. Overcoming marginalization, or extreme and persistent disadvantage, in education should be a high policy priority for all governments.

This chapter provides new measurement tools for identifying and monitoring marginalization in education, looks at underlying causes of exclusion of individuals and groups, and highlights strategies and practical policies for developing inclusive education within a broader framework of poverty reduction and social inclusion.

Measuring marginalization in education

Measuring marginalization in education is inherently difficult. National data are often not detailed enough to enable marginalized groups to be identified. Many governments attach little weight to obtaining better data about some of the most disadvantaged, such as child labourers, individuals with disabilities and those in informal settlements or remote regions. This year's report includes a new tool, the Deprivation and Marginalization in Education (DME) data set, which provides a window on the scale of marginalization within countries and on the social composition of the marginalized (Box 3).

Despite the progress of the past decade, absolute deprivation in education remains at high levels. On any global scale, having fewer than four years of education is a sign of extreme disadvantage. The DME data set establishes this as a benchmark for 'education poverty', with less than two years in school as an indicator for 'extreme education poverty' (Figure 7). Findings from sixty-three mostly low-income countries show that:

- *Education poverty.* In twenty-two countries, 30% or more of those aged 17 to 22 have fewer than

Support makes a difference: more girls in Yemen are now going to school

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four years of education. The share rises to 50% or more in eleven countries of sub-Saharan Africa.

- *Extreme education poverty.* In twenty-six countries, 20% or more of those aged 17 to 22 have fewer than two years of schooling, and in some countries, including Burkina Faso and Somalia, the share is 50% or more.

These averages mask extreme inequalities linked to wealth and gender. In the Philippines, education poverty rates among the poor are four times the national average. In some countries, high levels of marginalization among poor females account for a significant share of education poverty. Just under half of poor females aged 17 to 22 in Egypt have fewer than four years of education, and in Morocco the rate is 88%. Social inequalities also explain some striking cross-country differences. With a per capita income comparable to Viet Nam's, Pakistan has three times the level of education poverty, reflecting disparities linked to wealth, gender and region.

The factors leading to marginalization do not operate in isolation. Wealth and gender intersect with language, ethnicity, region and rural-urban differences to create mutually reinforcing disadvantages. Detailed DME data for young adults help identify groups facing particularly extreme restrictions on education opportunity and highlight the scale of national inequalities.

Cross-country analysis reveals complex patterns of marginalization. Some identifiable social groups

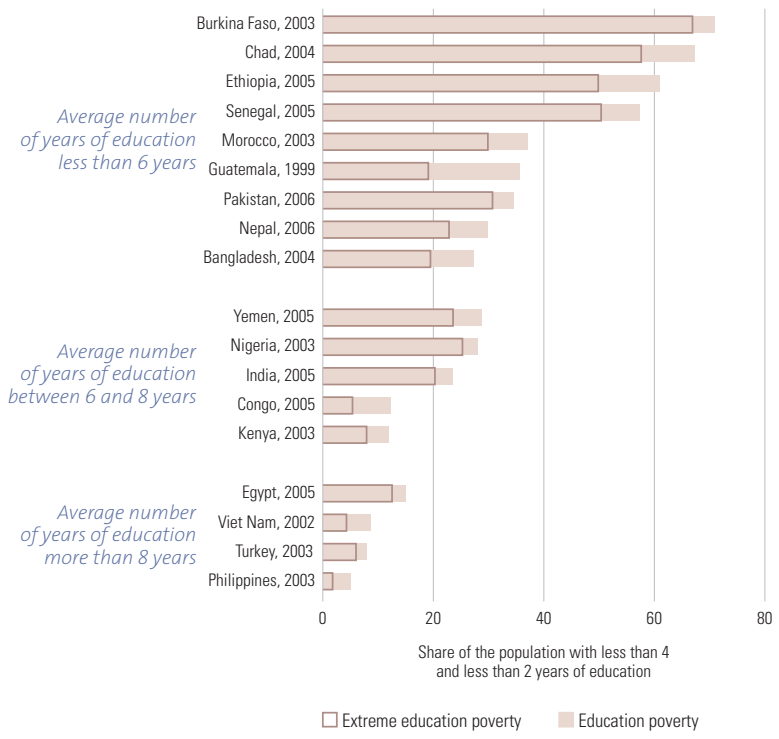
Box 3: A new tool for measuring marginalization

The Global Monitoring Report has developed a new international data set on marginalization in education that governments, NGOs and researchers can use. The Deprivation and Marginalization in Education (DME) data set uses data from different national and household surveys, covers eighty countries, almost half of which are low-income countries, and finds:

- *Education poverty*: Young adults aged 17 to 22 who have fewer than four years of education. They are unlikely to have mastered basic literacy or numeracy skills.
- *Extreme education poverty*: Young adults with fewer than two years of education, who are likely to face extreme disadvantage in many areas of their lives, including health and employment.
- *The bottom 20%*: Those with the fewest years of education in a given society.

The data set is on-line at www.efareport.unesco.org

Figure 7: Measuring education poverty across selected countries



Source: See Figure 3.1 in the *EFA Global Monitoring Report 2010*.

In Guatemala, average years in school range from 6.7 for Spanish speakers to 1.8 for speakers of Q'eqchi'

face almost universal disadvantage. Pastoralists in sub-Saharan Africa are an example. In Uganda, which has been making strong progress towards universal primary education, Karamajong pastoralists average less than one year of education. Many countries also register large disparities linked to language. In Guatemala, average years in school range from 6.7 for Spanish speakers to 1.8 for speakers of Q'eqchi'.

The DME data set looks beyond absolute deprivation to identify some of the key characteristics of those who are being left behind. The results highlight the powerful influence of social circumstances, over which children have no control, on their life chances. They also draw attention to unacceptable levels of inequality.

- Being born into a poor household doubles the risk of being in the bottom 20% in countries ranging from India to the Philippines and Viet Nam.
- Regional divides mean that living in areas such as rural Upper Egypt, northern Cameroon or eastern Turkey increases significantly the risk of falling into the bottom 20%.
- Gender, poverty, language and culture often combine to radically heighten the risk of being left far behind. In Turkey, 43% of Kurdish-speaking girls from the poorest households have fewer than two years of education, while the national average is 6%; in Nigeria, 97% of poor Hausa-speaking girls have fewer than two years of education (Figure 8).

Time spent in school is just one dimension of marginalization. There are also marked gaps in learning achievement linked to socio-economic status. Children of parents in the wealthiest fourth of the population in Brazil and Mexico score 25% to 30% higher in mathematics test scores, on average, than children of parents in the poorest fourth.

Marginalization in rich countries

Marginalization in education affects all countries. While absolute average achievement levels are higher in the developed world, extreme relative deprivation is a widespread concern. In the European Union as a whole, 15% of young people aged 18 to 24 leave school with only lower secondary school education, a figure that rises to 30% in Spain.

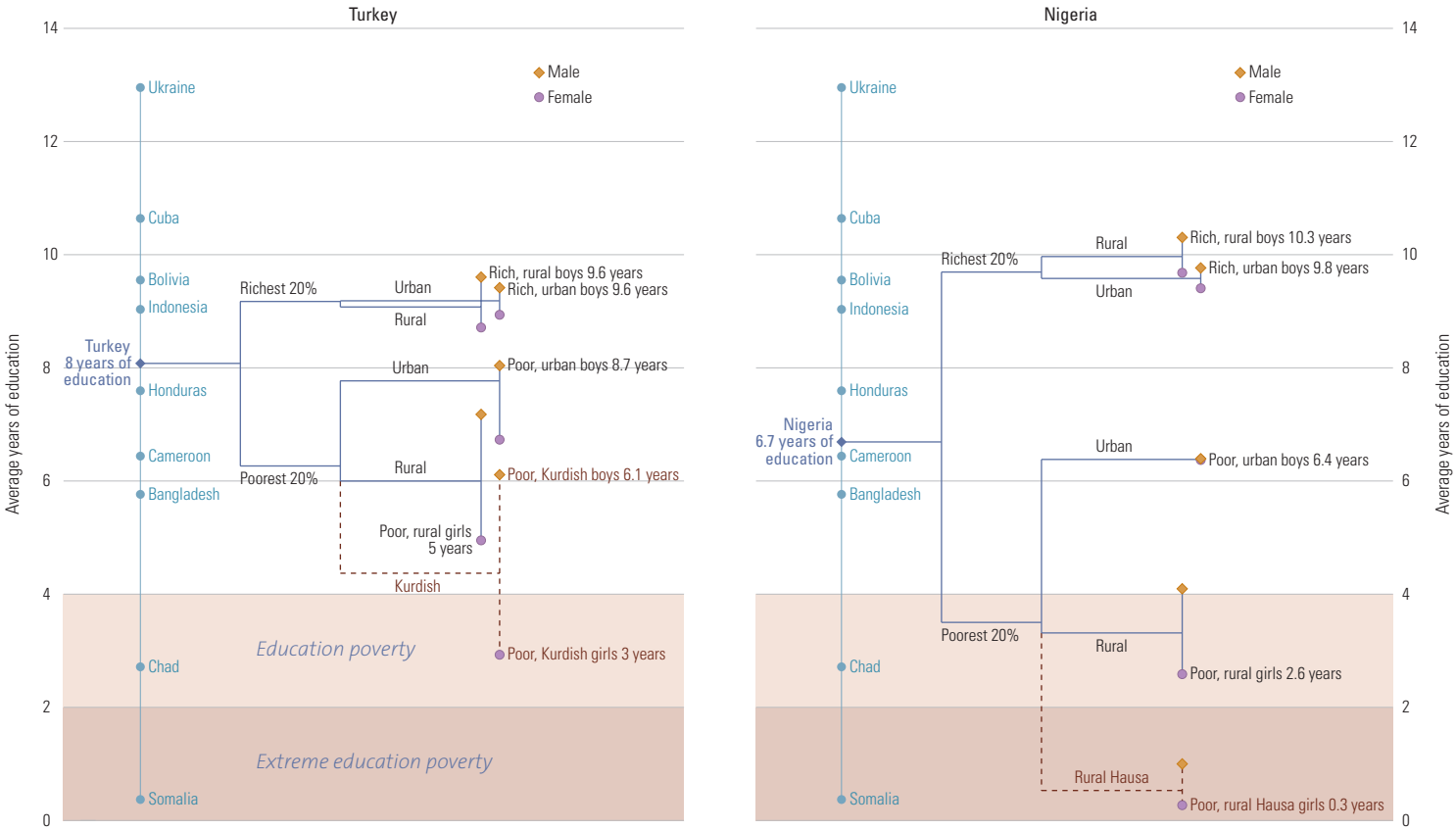
Evidence from the United States highlights the powerful influence of wealth and race. African-Americans are twice as likely to be out of school as white Americans, and young adults from poor households are three times as likely to be out of school as those from wealthy homes. International learning assessments illustrate the extent of national disparities. On the TIMSS scale for mathematics, the United States ranks ninth out of forty-eight countries, but United States schools with high concentrations of poverty rank thirteen places lower. The lowest 10% of performers in the United States fall below the average for Thailand and Tunisia.

Measuring marginalization is not an end in itself, but should be seen as a way to develop policies and interventions that can translate commitment to Education for All into meaningful action. Governments should start by setting targets for narrowing the gaps between marginalized groups and the rest of society. Monitoring progress towards these targets using disaggregated data could help the development of targeted policies while increasing the visibility of the marginalized.

Getting left behind

Predictable, persistent and extreme disadvantage is a reflection of the circumstances into which children are born and the conditions in which they grow and develop. The Report examines the processes through which these circumstances lock children out of education.

Figure 8: The education inequality tree: mapping marginalization in Turkey and Nigeria



Sources: See Figure 3.4 and Figure 3.12 in the *EFA Global Monitoring Report 2010.*

Poverty and child labour

Poverty is one of the most pervasive sources of disadvantage in education. Globally, there are 1.4 billion people surviving on less than $1.25 a day. For these households, the cost of schooling competes with spending on other basic needs such as healthcare and food. Parents' inability to afford education is one of the major reasons why children are not in school, even in countries that have abolished formal school fees, since the cost of uniforms, books and pencils creates barriers to school entry.

High levels of poverty limit households' ability to cope with the impact of economic shocks. The poorest often find it impossible to shield their children's schooling from losses of income and assets caused by droughts, floods, illness or economic downturns. Girls are often the first to feel the effects. In Pakistan and Uganda, droughts have resulted in far more girls being taken out of school than boys.

Child labour is another corollary of poverty that is detrimental to education. According to the latest estimates, there are about 116 million child labourers aged 5 to 14 in the world. While many children try to combine school with work, evidence from Latin America shows this has negative effects on learning achievement and, for many children, the extremely high number of working hours precludes any studying at all. Gender gaps in education often reflect girls' involvement in household labour. In the Lao People's Democratic Republic, young girls spend more than twice as much time as boys on household activities.

Group-based disadvantages

In many countries, children who are members of an ethnic or linguistic minority, an indigenous group or a low caste enter school with poorer prospects of success and emerge with fewer years of education and lower levels of achievement. Stigmatization is a potent source of marginalization. From the Aboriginal peoples of Australia to the hill tribes of Cambodia, failure to provide home-language instruction has often been part of a wider process of cultural subordination and social discrimination. All too often, children's school experience reinforces and perpetuates this marginalization.

Parents' inability to afford education is one of the major reasons that children are not in school

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

Caste systems in South Asia disadvantage many children (Box 4). One striking example comes from India, where researchers found that children from low-caste families performed at far lower learning achievement levels when their caste was publicly announced than when it was not revealed. The findings demonstrate the impact of stigma on self-confidence and learning levels, and on the treatment of these children in the school environment.

People who do not speak a country's official language often face marginalization in education and beyond. Around 221 million children speak a different language at home from the language of instruction in school. Put simply, one of the reasons that many linguistic and ethnic minority children perform poorly in school is that they are taught in a language they struggle to understand.

Addressing language-related disadvantage confronts governments and households with major challenges. Research demonstrates that children in their early years learn best when taught in their home language, with other languages gradually introduced. But parents and children often rightly see learning in an official national language as a key to future employment and enhanced life chances. Many countries are seeking to find the right balance though bilingual education programmes.

Linguistic diversity creates challenges, however, in areas such as teacher recruitment, curriculum development and teaching materials, and providing policies for bilingual education are often not fully implemented. In Peru, only around 10% of indigenous children attend intercultural bilingual schools.

Box 4: Living with stigma: the 'rat catchers' of Uttar Pradesh

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

Khalispur has a government primary school. Despite an entitlement to receive a stipend, midday meals and uniforms, few Musahar girls attend. For these girls, school is a place where they experience social exclusion. Various forms of discrimination reinforce caste hierarchies in the classroom. 'We are forced to sit on the floor', one girl said. 'The desks and benches in the classroom are meant for the children from the higher castes'. According to Musahar elders, government policies have improved but social attitudes have not: 'They do admit our children to school and we now have legal rights, but the behaviour of children from other castes and the teachers is a problem. Our children do not dare attend the school.'

The experience of the Musahar is a microcosm of a much wider problem. Most governments have outlawed formal discrimination, but altering social attitudes has received less political attention, limiting the benefits of wider social reforms.

Location and livelihoods

Children living in slums, remote rural areas or conflict-affected zones are typically among the poorest and most vulnerable. Potentially they have the most to gain from education, yet they live in areas with the most limited basic services.

On one estimate, one in three urban dwellers in the developing world – 900 million in total – resides in a slum. Slums are focal points for educational deprivation, partly because of poverty but also because many governments fail to recognize the entitlements of slum dwellers to basic services. In Dhaka, Bangladesh, about 4 million people now live in slums. Many children of the poorest slum dwellers are either out of school or reliant on non-government providers.

Livelihoods and locations are often strong indicators of social disadvantage in education. Children living in rural areas, especially in remote regions, face heightened risks of marginalization in education, and more so if they are poor and female. They have greater distances to travel to school, sometimes across difficult terrain. Pastoralists register high levels of deprivation in education, as immobile school infrastructures and timetables are ill-equipped to respond to the needs of such highly mobile populations.

Millions of the world's most marginalized children live in countries affected by conflict. Around 14 million children aged 5 to 17 worldwide have been forcibly displaced by conflict, often into refugee camps or centres for displaced people lacking even the most rudimentary education facilities. In Pakistan, a refugee census in 2005 estimated that 1 million Afghan refugee children were out of school. Internal displacement can also create wide-ranging problems for education, overloading the system in areas of resettlement. In the Philippines, ongoing conflict has severely disrupted children's schooling and left the Autonomous Region in Muslim Mindanao lagging far behind the rest of the country in terms of education .

Less easy to measure than impacts on school attendance are the effects on learning of trauma associated with armed conflict. Conflict in 2008 and 2009 gravely affected the education system in Gaza. In a report prepared for the United Nations General Assembly, evidence of both sides targeting civilian populations was documented. Military actions by Israeli forces led to the deaths of 164 students and 12 teachers, and severely damaged or destroyed 280 schools and kindergartens. In an area where 69% of adolescents were reported to be experiencing post-traumatic stress before the latest episode of violence, many children have now returned to school carrying with them the effects of anxiety and emotional shock.

Disability

There are an estimated 150 million children in the world with disabilities, about four-fifths of them in developing countries. Millions more live with disabled parents or relatives. Beyond their immediate health-related effects, physical and mental impairments carry a stigma that often leads to exclusion from society and from school. In Bulgaria and Romania, net enrolment ratios for children aged 7 to 15 were over 90% in 2002, but 58% for children with disabilities. Patterns of disadvantage associated with disability vary. Children with impairments that affect the capacity to communicate, and more severe impairments overall, typically have the most limited opportunities for education, especially in the poorest countries. In Burkina Faso, children reported as deaf or mute, living with a mental impairment or blind were far less likely to be enrolled in school than those with a physical impairment.

Education systems and classroom experience can play a role in counteracting institutionalized discrimination, stigmatization and neglect within the classroom, the local community and the home. They often have the opposite effect, however, as inadequate physical access and shortages of trained teachers and teaching aids, and discriminatory classroom practices can diminish opportunities.

HIV and AIDS

An estimated 33 million people were living with HIV and AIDS in 2007, including 2 million children under 15. HIV and AIDS threatens lives, keeps children out of school and compromises learning. It also reinforces wider problems arising from poverty and social discrimination, such as economic pressure, orphanhood, stigmatization, institutionalized discrimination and deep gender disparities in education. One study in Thailand found that those with HIV were denied admission to school in violation of national laws. Educators expressed concern that other parents would react negatively to the enrolment of HIV-positive students.

Governments have failed to respond with sufficient urgency to the issues raised by HIV and AIDS in education, including challenging misperceptions and overcoming stigmatization.

© Handicap International

An inclusive school in Nicaragua makes room for everyone

Physical and mental impairments carry a stigma that often leads to exclusion from society and from school

Levelling the playing field

Providing good quality learning opportunities for marginalized children is often difficult, yet progress is possible with sustained political commitment. Understanding the social mechanisms behind marginalization in specific contexts along with a commitment to social justice, equal opportunity and basic rights are all key components of long-term strategies.

Stipends for marginalized groups can help make school more affordable and provide incentives to keep children in school

Schools can make a great deal of difference to the lives of marginalized children. They can also diminish disadvantages accumulated in early childhood. Nutrition, maternal and child health, and early childhood care and education are central to an integrated approach to overcoming marginalization.

The Report identifies three broad sets of policies that can combat marginalization. These policies can be thought of as the three points of an inclusive education triangle: access and affordability, the learning environment, and entitlements and opportunities (Figure 9).

Expanding access and improving affordability for excluded groups

In most countries in danger of missing the target for universal primary education, improving opportunities in education often means lowering cost barriers and bringing schools closer to marginalized children. Removing school fees is necessary for reaching the poorest, but not enough in itself. Governments also need to lower indirect costs associated with uniforms, textbooks and informal fees. In Viet Nam, where school costs are cited as a reason children drop out of school, free textbooks and notebooks have been provided to ethnic minority students.

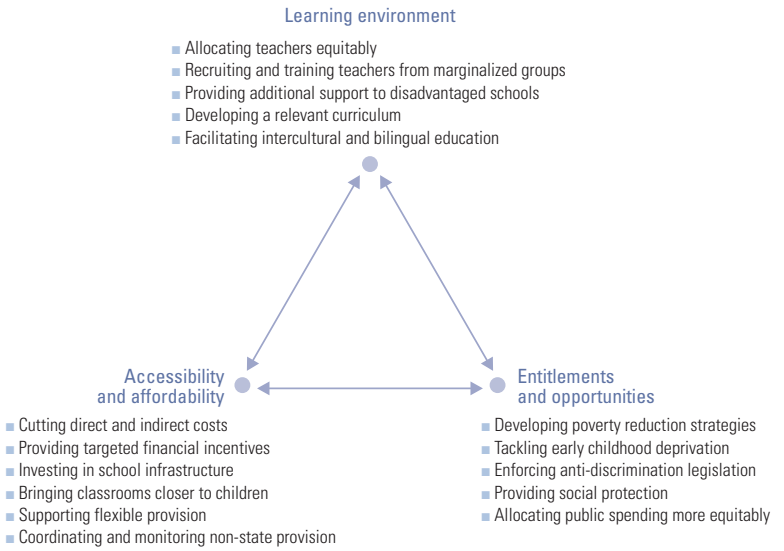
Stipends for identifiably marginalized groups can help make school more affordable and provide incentives to keep children in school at both the primary and secondary level. In Bangladesh and Cambodia these have played an important role in narrowing gender gaps and increasing the transition rate to secondary school.

The distance between children and classrooms remains a major barrier to Education for All. Classroom shortages inevitably increase distance to school. Many poor countries in sub-Saharan Africa simply do not have enough classrooms: there is an estimated shortfall of 1.7 million. These countries will have to double the number of classrooms to meet the EFA goals by 2015.

Bringing schools closer to marginalized communities is also important, especially for gender equity and improving access for children with disabilities. Classroom construction programmes that focus on poor rural areas can cut distance to school and boost attendance, as demonstrated in Ethiopia. Several countries have developed 'satellite school' models: schools are organized into clusters, usually consisting of a central, relatively well-resourced school and several smaller satellites. Bolivia's *núcleo* or cluster school system has played a vital role in expanding access to education among indigenous children in highland areas. More flexible approaches to education provision could bring education within reach of some of the world's most marginalized children (Box 5).

Many marginalized children and youth never attended school or dropped out early. Facilitating a way back into education is a key strategy for empowering youth and young adults to escape poverty. Many such 'second chance' programmes are run by NGOs. They can extend access to the most hard-to-reach children and youth, from Bangladeshi nomadic and street children to those in disadvantaged regions in Ghana. The School for Life project in Ghana provides intensive literacy courses for children aged 8 to 14 to prepare them to re-enter primary school, and has reached around 85,000 students over the past decade. Governments need to integrate such NGO initiatives into national planning, while monitoring the quality of the education they provide.

Figure 9: The inclusive education triangle



Source: See Figure 3.29 in the *EFA Global Monitoring Report 2010.*

The learning environment

Getting marginalized children into school is just a first step. Ensuring that these children receive good quality education also poses significant policy challenges.

Ensuring that teachers are trained and equipped to deliver good quality education and that they are responsive to the needs of disadvantaged children is critical to any strategy for combating marginalization. Recruiting teachers from marginalized groups can promote positive identities, combat discrimination and ensure that children are able to learn in their own language. In Cambodia, ethnic minorities have preferential access to teacher training. Getting qualified teachers in sufficient number to areas with difficult living conditions requires more equitable deployment and targeted support for failing schools. In Gambia and Mozambique, bonuses or special allowances are given to teachers working in remote areas.

Teachers need training to equip them to teach effectively in classrooms with children from diverse backgrounds. This may include challenging their attitudes to the marginalized. One example of such programmes is in the Amazonian region of Peru, with both indigenous and non-indigenous experts cooperating to train bilingual teachers and familiarize them with indigenous culture.

Providing intercultural and bilingual education is critical for reaching ethnic and linguistic minority children. Many examples of programmes from sub-Saharan Africa are demonstrating that teaching in a child's home language delivers positive results. Bilingual schools in Burkina Faso have increased learning achievement, while in Mali they have helped reduce school drop-out rates.

Education reform in some Latin American countries has sought to implement intercultural and bilingual education, to address the linked issues of language and cultural identity. In Bolivia, intercultural and bilingual education has been introduced for the three most widely used indigenous languages and covered 11% of all primary schools in 2002. Textbooks were also changed to attach more weight to the country's multicultural history and the role of indigenous peoples.

Intercultural education has a key role to play not only in reaching the marginalized but also by providing a curriculum to all learners that builds respect for different cultures, combats prejudice, raises awareness about social inequalities and fosters debate.

Ensuring that children with disabilities enjoy opportunities for learning in an inclusive environment requires changes in governmental attitude, backed by investments in teacher training, physical infrastructure and the provision of learning equipment. The 2008 Convention on the Rights of Persons with Disabilities sets out a broad agenda for delivery, and it is important that all governments ratify the Convention and act on its principles. Some successful NGO projects are providing useful insights. In the Lao People's Democratic Republic a network of over 500 schools is creating opportunities for children with special needs to learn in an inclusive environment.

Box 5: Reaching pastoralists in northern Kenya

Fewer than 40% of children were enrolled in school in 2007 in the North Eastern Province of Kenya, four years after the government abolished school fees. Pastoralists' mobile lifestyle and extreme vulnerability mean that reducing the cost of schooling alone is insufficient to give their children access to education.

This picture has been changing with the emergence of pastoralist civil society organizations and a significant pastoralist group in Parliament, a development that has increased the visibility of one of the country's most marginalized groups. The recent creation of a Ministry of State for the Development of Northern Kenya and other Arid Lands is one of the boldest statements of the government's intention to address challenges in the north more proactively.

A Nomadic Education Policy was drafted in 2008. Innovations include incorporating traditional knowledge in the curriculum, providing grants to mobile schools, establishing feeder schools within local communities, modifying the formal system to suit the nomadic calendar, recruiting teachers (particularly females) from nomadic areas through affirmative action, and using radio and mobile phones for outreach.

The real challenge remains for the Ministry to implement its broad mandate and for central government to increase funding.

Entitlements and opportunities

Prospects for greater equity in education depend on what happens to children beyond the school, in the social and economic structures that perpetuate marginalization.

Rights, laws and political mobilization

Legal provisions can play a role in overcoming discrimination. International conventions and wider human rights instruments set norms and establish the institutional framework for advancing civil, political, social and economic rights. National legal codes and constitutions translate these norms into systems of rights and entitlements. In some cases the recourse to law has been a powerful force for change. A landmark ruling in civil rights in the United States was the 1954 decision in *Brown* v. *Board of Education*, which overturned laws separating children of different races into different schools. The principles applied in this case were then used to challenge segregation in other areas,

Providing intercultural and bilingual education is critical for reaching ethnic and linguistic minority children

serving as a milestone in the struggle of African-Americans to gain equal civil and political rights.

Other marginalized groups, such as the Roma in Europe, have successfully challenged the legality of policies that produce institutionalized segregation. In India, the constitutional commitment to free education for all children has existed since 1950, but only recently has it become a legal obligation enforceable through the courts.

In New Zealand, the *kōhanga reo* language movement has provided a social, political and cultural focal point for empowerment of Māori people

Legal provisions are likely to prove most effective when backed by political mobilization on the part of marginalized people. In New Zealand, the *kōhanga reo* language movement has provided a social, political and cultural focal point for empowerment of Māori people and contributed to the expansion of educational opportunities for Māori children and the development of a more multicultural education system.

Social protection: cash transfers and beyond

Social protection is a critical tool for households to mitigate the vulnerability that comes with poverty. Programmes range from cash transfers to job-based safety nets and interventions that support nutrition. Social protection programmes in Latin America have a strong track record in improving school attendance and progression indicators. For example, Nicaragua's *Red de Protección Social* programme, which targeted children who had not yet completed primary school, increased enrolment by thirteen percentage points, with extremely poor children registering the most marked gains.

Poorer countries also have experience with a variety of social protection programmes. Many have registered positive results for education. Ethiopia's Productive Safety Net Programme has enabled vulnerable households to increase spending on education and health, and to keep children in school during drought. Increased investment in well-targeted social protection by governments and donors has the potential to enhance equity and accelerate progress towards the Education for All goals.

Budgeting against marginalization

Reaching the most marginalized often requires higher spending than for wealthier areas. The role of central governments is crucial in redirecting financial resources to the areas or populations most in need. Most countries have some redistributive element in public finance, such as mobilizing new resources, prioritizing equity or targeting regional development. The FUNDEB programme in Brazil is an example of an attempt to narrow large state-level financing gaps in education. This has benefited the most disadvantaged areas, even though large gaps in per capita financing remain.

Marginalization in education is sustained by public attitudes and social processes that stigmatize disadvantaged groups and restrict their opportunities. That is why this Report emphasizes the need for all governments to develop integrated strategies for combating marginalization within a wider framework for poverty reduction and social inclusion.

On the move: pastoralist communities require flexible solutions

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© REUTERS/Ahmad Masood

Conflict and displacement pose particular challenges to education, Afghanistan

Chapter 4

The aid compact: falling short of commitments

- *With many poor countries facing budget pressures as a result of the global financial crisis, increased international aid is critical for achieving human development goals.*
- *Overall aid levels are rising, but there is a danger that donors will fall short of pledges for 2010.*
- *Aid disbursements for basic education are rising, but commitments have fallen, a trend that raises concerns over future flows.*
- *Some donors – including G8 members – are failing to meet their fair share of the aid burden.*
- *There have been improvements in delivering aid effectively, but progress towards agreed targets has been mixed.*
- *Many conflict-affected poor countries receive insufficient support for education.*

Aid for education in Mozambique has helped to reduce the number of children out of school by half a million

International aid is a vital part of the Education for All compact. In 2000, rich countries pledged that no country committed to achieving the EFA goals would be allowed to fail for want of finance. The global economic downturn has reinforced the significance of that commitment. Weaker economic growth and mounting pressure on government budgets threaten to reverse the hard-won gains of the past decade. Countering that threat will require not just increasing aid flows but also improving the quality of aid.

Some commentators, sceptical about aid effectiveness, have recently been calling for development assistance to be curtailed or even eliminated. Yet the evidence does not support such pessimism. Aid for education in Mozambique, for example, has helped to increase net primary enrolment from 52% at the end of the 1990s to 76% in 2007, with the number of children out of school falling by half a million. In Afghanistan, aid is helping millions of children, especially girls, attend school for the first time. International aid cannot substitute for effective national policies. But it can help remove the barriers to school created by poverty, gender and other sources of marginalization.

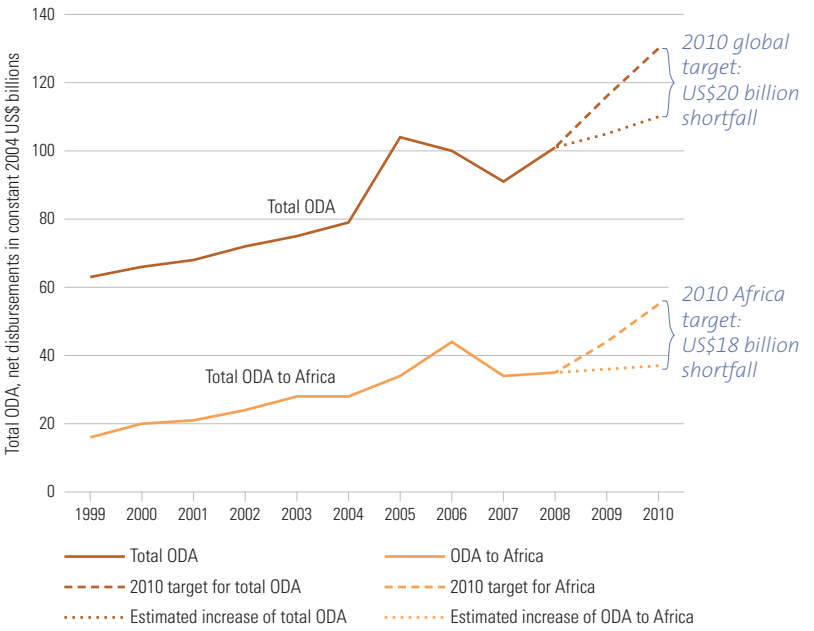
The record on delivery

The level of international aid for education is strongly determined by the size of the global aid envelope. The good news is that overall development assistance rose sharply in 2008, with aid increasing by around 10% from the previous year to US$101 billion (in constant 2004 prices). The share of aid in the gross national income (GNI) of rich countries also increased, to 0.30%. However, donors are not on track to meet the commitments made at a series of international meetings in 2005, including the Gleneagles G8 summit, to increase overall aid to US$130 billion by 2010. On the current trajectory, there could be a global gap between target aid spending and actual spending of around US$20 billion in 2010, US$18 billion of this for Africa (Figure 10).

Donors have a mixed record on performance against the various international targets. European Union members have a shared commitment to reach a collective aid-to-GNI target of 0.56% by 2010 and 0.70% by 2015 (Figure 11). While Germany and Spain have significantly increased aid-to-GNI, other countries have registered a marginal increase (Italy), no increase (the United States) or a decline (Japan). Five countries surpassed the United Nations target of 0.7%, and Sweden invests almost 1%.

Prospects for achieving the 2010 aid targets have diminished even more with the global economic downturn. Many donors' spending plans are yet to be clarified, but lessons from past crises give cause for concern. Hard hit by the economic crisis, Ireland's aid budget will be cut by around one-fifth, though commitments have been made to restore these cuts as the economy recovers. It is important that every effort is made to protect aid flows. Cutting aid just when many of the poorest populations are being hit by the economic downturn would erode past investments in human development and deal a fatal blow to 2015 targets.

Figure 10: Africa faces the greatest projected shortfall in total aid



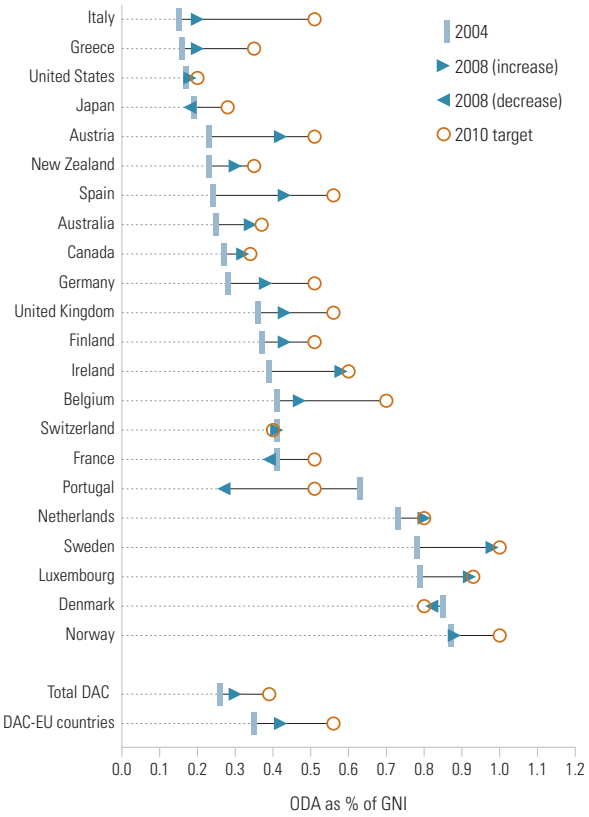
Source: See Figure 4.1 in the *EFA Global Monitoring Report 2010.*

Recent trends

Aid disbursements have been rising steadily both for education in general and for basic education. Overall aid flows to education reached US$10.8 billion in 2007, more than double the level in 2002. Aid payments for basic education grew more slowly, from US$2.1 billion in 2002 to US$4.1 billion in 2007. The increase in aid to education has been driven by overall aid increases, not because it was made a higher priority. In 2006–2007, education accounted for an average of about 12% of all aid commitments, the same level as in 1999–2000.

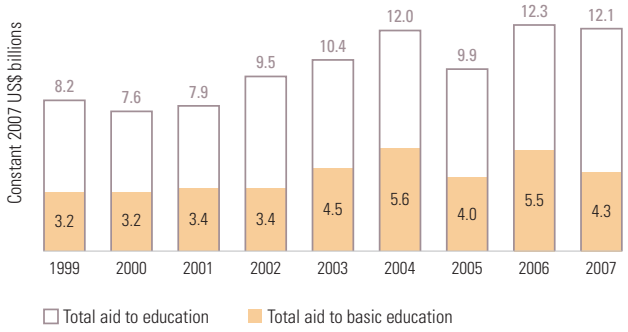
The picture for aid commitments contrasts strongly with that for disbursements. Overall commitment levels are stagnating, though the trend is erratic (Figure 12). In 2007, reported commitments to education stood at US$12.1 billion, around the same level as in 2004. Basic education remains an area of particular concern. While aid commitments rose 58% in the years

Figure 11: Nearly all donors are falling short of their aid pledges for 2010



Source: See Figure 4.2 in the *EFA Global Monitoring Report 2010.*

Figure 12: After rising in the early part of the decade, aid commitments to basic education are stagnating



Source: See Figure 4.7 in the *EFA Global Monitoring Report 2010.*

after the Dakar agreement in 2000, the period since 2004 has been marked by stagnation punctuated by episodes of steep decline. In real terms, the US$4.3 billion reported in 2007 represented a cut of 22%, or about US$1.2 billion, from its 2006 level. The decline in commitments to basic education was far greater than that for education as a whole.

While fluctuations in donors' annual commitments are inevitable, recent trends highlight systemic problems. One problem is that overall aid flows to education are dominated by a small group of donors. The five largest donors to education – France, Germany, the World Bank's International Development Association (IDA), the Netherlands and the United Kingdom – accounted for just under 60% of total commitments to education. One result of this concentration is that relatively small movements by one or two key donors can lead to large fluctuations in overall funding levels.

Another concern is the balance of aid flows between different levels of education. In 2000, donors pledged to increase the priority they give to basic education, but that pledge has not led to a discernible shift in resource allocations. Basic education accounted for about two-fifths of the total aid envelope for education in 2006–2007, roughly the same as in 2000. Low-income countries continue to receive just under half of all aid to education, on average, and almost 60% of aid to basic education.

Individual donors vary considerably in their commitments to the different levels of education. Two of the six largest bilateral donors to education – the Netherlands and the United States – direct over 60% of aid to basic education. Three others – France, Germany and Japan – commit over 55% to post-basic education. In France and Germany, a large proportion of the aid budget for education is allocated to their own institutions who admit foreign students. Other donors, such as Spain, have moved towards directing more aid to basic education.

Important new sources of aid are emerging, some of which could give a significant boost to education. Donors not allied to the OECD's Development Assistance Committee, such as China and Saudi Arabia, have all made contributions to education in recent years. Aid from the private sector has also increased. Innovative financing mechanisms, such as those already developed in other sectors, could be better mobilized to help fill the education financing gap (Box 6).

US$4.3 billion commitments to basic education reported in 2007 represented a cut of 22%

Making aid more effective

Quality of aid is more difficult to measure than quantity, but no less important. The 2005 Paris Declaration on Aid Effectiveness marked an attempt by donors and aid recipients to identify ways to deliver aid more effectively, but progress towards the targets set out in the Declaration has been mixed. Efforts will have to be scaled up over the next three years if the targets are to be reached.

Innovative financing mechanisms could be better mobilized to help fill the education financing gap

Box 6: FIFA and the World Cup helping meet the EFA goals

The 2010 football World Cup is becoming an important focal point for international action and campaigning on Education for All. The Global Campaign for Education is working with the Fédération Internationale de Football Association (FIFA) to raise awareness of the education problems facing sub-Saharan Africa. Innovative financing could go on benefiting education well after the 2010 World Cup events are over. An agreement by the major European leagues and the FIFA World Cup to place a small (0.4%) 'Better Future' levy on future sponsorship and media marketing revenue could generate about US$50 million annually. This would translate into putting an extra 500,000 children in school in some of the world's poorest countries.

Aid predictability

Without predictable and timely aid, recipient governments have trouble making medium-term financing plans and delivering on them. In 2007, only 63% of aid arrived on schedule. For some countries, the figure was far below that level. In Yemen, just one-third of scheduled aid was paid out in 2007 and only US$151 million of the US$477 million of aid Benin was set to receive actually arrived.

Problems with aid predictability are not the sole responsibility of donors. Often, there are problems on both sides of the aid partnership, with weak planning by aid recipients and a lack of multi-year commitments from donors. A United Republic of Tanzania study found that low disbursements to the national primary education programme were linked to delays in approval of work plans and poor quality audit reports, as well as unrealistic donor reporting requirements.

Use of countries' public financial management systems

Donors have set an ambitious target of channelling 80% of aid through recipient countries' public financial management systems by 2010. Progress towards this target has been slow: in 2007 only 43% of aid was channelled through national systems. This was partly because of the weakness of these systems and their inability to administer large aid flows. But even where systems have been strengthened, donors have sometimes been slow in increasing the aid channelled through them. Furthermore, the quality of a country's public financial management system remains a weak guide to its use by donors. Bangladesh has a weaker system than Mozambique, Rwanda or Zambia, yet has a far higher share of aid using national reporting systems. Such outcomes call into question the effectiveness of incentives for reform created by the donor community.

Aligning aid and coordinating activity

Better aid coordination means donors working collectively to align their activities with the plans of recipient governments. One indicator of progress in this area is the share of programme-based aid. In 2005–2006, it accounted for 54% of all aid to basic education, compared with 31% in 1999–2000. Mozambique and Zambia have seen a strong shift towards pooled funding for education, with donors working together through national systems and shared reporting structures.

A bilingual welcome, Peru

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Outdoor learning in Uganda: adapting education to community needs

Aid to conflict-affected countries

Increased aid is vital for education in conflict-affected poor countries. While aid to these countries is rising, it falls far short of what is needed. The twenty poor countries affected by conflict account for about one-third of children who are out of school, but in 2006–2007 just under one-fifth of overall aid to education and one-quarter of aid to basic education went to these countries, and more than half of this aid went to just three countries (Afghanistan, Ethiopia and Pakistan).

From humanitarian to development aid: the missing link

In many conflict-affected countries, expenditure on security operations and humanitarian assistance dominates donor support, with long-term development in general and education in particular taking a back seat. Estimates suggest that in 2008 education accounted for only 2% of total humanitarian aid, or US$237 million. In the Democratic Republic of the Congo, US$5 million, only 1% of humanitarian aid, supported education interventions in 2007, far short of the US$27 million identified as a minimum national requirement in this sector. The problem is not that the international community invests too much on security and alleviating hunger. It is that too little is invested in other areas that are no less important to post-conflict reconstruction.

Donors increasingly recognize the importance of long-term social and economic reconstruction in conflict and post-conflict situations. However progress towards a policy framework linking short-term humanitarian and long-term development assistance, has been limited.

Reforming the Fast Track Initiative

To meet the Dakar challenge by 2015, the world needs an effective global funding mechanism to provide crucial resources for building education systems. When the Fast Track Initiative (FTI) was launched in 2002, it was widely seen as a catalyst for accelerated progress towards Education for All. However, its structure has been failing to deliver. A major reform of the FTI is critical to meet the EFA goals.

Key messages

- *The world needs an ambitious multilateral framework to accelerate progress towards the 2015 education goals.*
- *While it has registered some important achievements, the Fast Track Initiative has failed to mobilize and deliver financing on the required scale.*
- *New governance rules are needed to increase the voice of developing countries and the transparency of decision-making.*
- *More should be done to support conflict-affected countries.*
- *Fundamental reform of the current FTI structure is crucial, and global health initatives can provide useful lessons.*

The Fast Track Initiative framework

At its inception, the FTI's objective was to strengthen national education planning, leading to greater donor coordination and increased bilateral aid. It was expected to galvanize resources indirectly through an 'endorsement effect', with its stamp of approval unlocking increased donor support. Subsequently, the FTI became a source of finance in its own right through the Catalytic Fund.

The results have been disappointing. When assessed against the scale of the financing gap, the FTI has failed to mobilize resources on the scale required. Fundamental reforms are needed.

The FTI's governance structure involves many actors and complex processes. While efforts have been made to reform these, four main problems remain:

- dominance of donors and lack of independent reviewers, with the secretariat subject to World Bank procedures;

Donors increasingly recognize the importance of long-term social and economic reconstruction in conflict and post-conflict situations

Developing countries have little say in FTI decision-making

- a lack of voice for developing countries in decision-making;
- multiple levels of decision-making between the local donor groups and the World Bank, which can be contradictory or inconsistent;
- weak leadership, linked to the absence of high-level political support in key agencies and donor countries.

Delivering finance: too little and too erratic

There is little evidence that FTI endorsement leads to increased bilateral support from in-country donors. Delivery through the Catalytic Fund has also been disappointing. Created in 2003 as a direct funding mechanism, the Catalytic Fund has suffered from limited resource mobilization, poor disbursement rates and a narrow donor base. Out of the US$1.2 billion received by the Catalytic Fund, as of March 2009 US$491 million had been disbursed, half of this to just three countries, Kenya, Madagascar and Rwanda. An allocation to Senegal in 2007 had still not been disbursed in April 2009. Two years after the initial Catalytic Fund allocation, Mozambique had received only US$29 million of a US$79 million grant. The application of more stringent rules in 2007 significantly slowed the pace of disbursement, though there have been some signs of improvement over the past year (Figure 13).

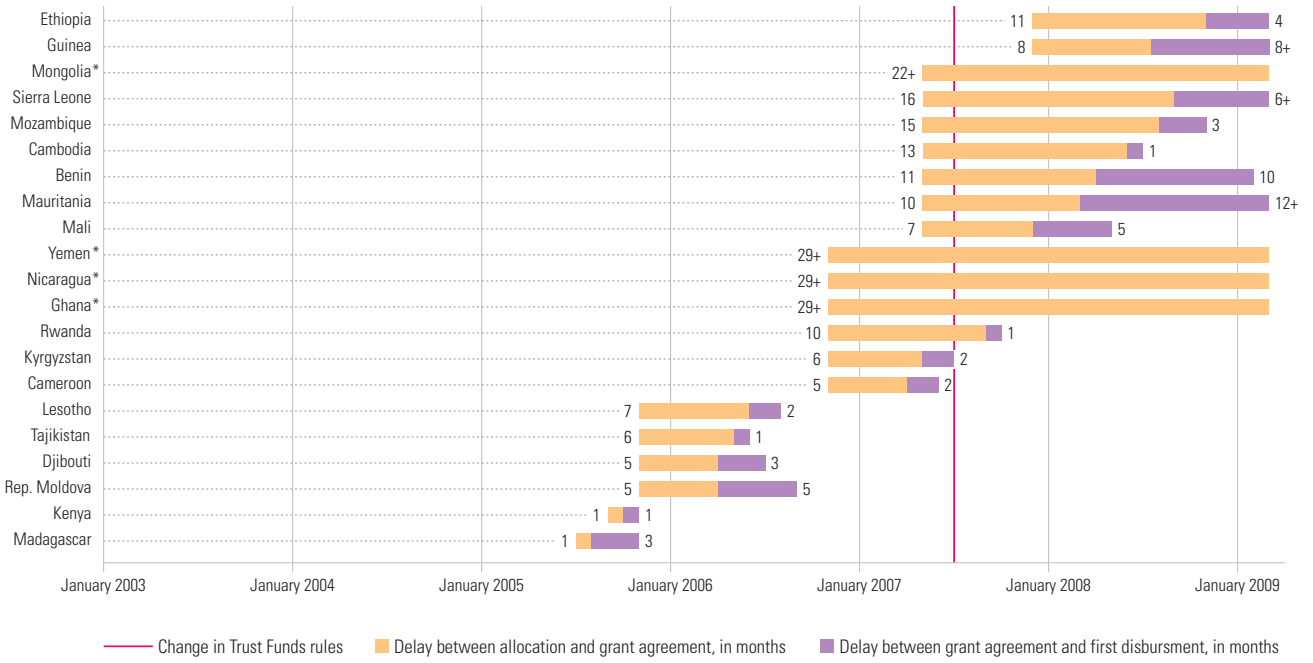
Countries affected by conflict have not been well served by the FTI, even when they have gone through the endorsement process. Three months after the FTI endorsed the national education plan, Sierra Leone was approved for US$13.9 million in Catalytic Fund support. In April 2009, two years after the allocation decision, it was still awaiting its first disbursement. Liberia's plan was endorsed, but its application for Catalytic Fund support was rejected.

Lessons from global health funds

The past decade has been marked by the rapid development of global initiatives in health financing, which have galvanized political support, keeping health at the centre of the international development agenda.

Prominent examples include the Global Fund to Fight AIDS, Tuberculosis and Malaria and the GAVI Alliance (formerly the Global Alliance for Vaccination and Immunisation), which have both had a measurable impact on health outcomes. The Global Fund has supplied anti-retroviral drugs to about 2 million people and tuberculosis treatment to 4.6 million, and saved around 3.5 million lives. By the end of 2008, it had disbursed US$7 billion. GAVI support for immunization programmes has averted an estimated 3.4 million deaths.

Figure 13: Long delays between allocation and disbursement from the Catalytic Fund



* Third-year grant.
Source: See Figure 4.19 in the *EFA Global Monitoring Report 2010.*

Window of opportunity: slum children in and out of school, Bangladesh

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Many of the principles and practices of the global health partnerships are relevant to the FTI. They have succeeded in scaling up aid resources and sustaining high rates of disbursement, and have mobilized new sources of finance, especially from philanthropic foundations.

Governance arrangements have contributed to their effectiveness. The Global Fund is an independent body, not dominated by any single organization or donor. Developing country governments and civil society groups have a strong voice, and planning is driven by national committees under a transparent decision-making system. In spite of the differences between health and education, there are important lessons to be drawn for reform of the FTI.

Towards a reformed global initiative for education

A reformed FTI could give renewed impetus to progress towards the Dakar goals. This report suggests several ways to enhance the effectiveness of multilateralism in education:

- Go back to first principles: an effective multilateral initiative should focus on closing the Education for All financing gaps through coordinated support for national plans.
- Establish the FTI as an independent foundation outside the World Bank, with a strong independent secretariat, and reform governance arrangements to strengthen the voice of developing country governments and civil society groups.
- Restructure planning and processes through greater transparency and a dilution of donor domination over financing decisions.
- Establish a secure and predictable financing base through regular pledging conferences.
- Address the specific needs of conflict-affected countries by supporting both short-term recovery and long-term planning goals through a unified process within the FTI.

FTI reform will require practical measures backed by high-level political leadership and a new vision. The bigger challenge is for champions of education among developing country governments, donors and civil society groups to work together more effectively for change.

Many of the principles and practices of the global health partnerships are relevant to the FTI

Chapter 5

Rising to the EFA challenge

With five years to go to the 2015 target date, the Education for All goals are at a crossroads. Many of the world's poorest countries remain far off track for the goals set at Dakar. They could be pushed even further off track, as their prospects for recovering from the global economic crisis remain uncertain. There is a real danger that progress will stall and that in some countries the hard-won gains made since 2000 may be lost. If the world is to make a big push towards the Dakar goals, then governments, donors and the international community must show greater political commitment. The 2010 Millennium Development Goals summit provides an opportunity to set a new course.

As governments look to 2015, it is critically important to place marginalization at the very core of the Education for All agenda. The EFA targets will not be reached in many countries unless governments direct their attention and resources towards those who are being left behind as a result of disparities linked to poverty, gender, ethnicity, language and other markers of disadvantage. This report has identified problems to be addressed and identified some broad policy lessons.

The EFA targets will not be reached in many countries unless governments direct their attention and resources towards those who are being left behind

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

1. Set equity-based targets for all EFA goals

Governments should not only set national average targets, they must also set 'equity-based targets' that focus on the marginalized. These could be defined in terms of narrowing disparities due to wealth, gender, language and location.

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

Monitoring and measurement should be seen as an integral part of strategies aimed at identifying those who are being left behind and policies that help them. Effective monitoring and disaggregated data are also required for assessing progress towards equity-based targets.

The Deprivation and Marginalization in Education data set developed for this report could be used as part of a larger toolkit to strengthen the focus on equity.

Governments need to invest more in national data collection to allow a context-specific understanding of marginalization. Such data can also be used to address the equity gap by targeting resources to underperforming schools and areas.

3. Identify the drivers of marginalization for specific groups

The overall effect of marginalization is to restrict opportunity because of factors over which children have no control. These factors are enormously varied. The problems faced by slum dwellers are not the same as those faced by the rural poor. 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. Understanding factors like these matters because successful measures to tackle marginalization have to target specific underlying causes that may be missed by blanket interventions.

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

Governments need to make greater equity a higher national policy priority and 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, providing targeted support to the marginalized, reducing the distance between schools and communities, and developing more flexible approaches to providing education, including mobile schools for pastoralists and multigrade teaching in remote areas.

- Measures are required to *strengthen the learning environment*. More equitable teacher deployment and the development of intercultural and bilingual education are high priorities. Directing financial and pedagogical support to schools in the most disadvantaged regions or with large numbers of marginalized children can also make a difference.

Whatever it takes: getting to school by boat, Mali

- *Expanding entitlements and opportunities* for education also involves enforcing laws against discrimination, providing social protection and redistributing public finance.

Each of these areas needs to be integrated into a system-wide education plan linked with broader strategies for poverty reduction and social inclusion.

5. Increase resource mobilization and strengthen equity in public spending

Low-income developing countries have the potential to increase spending on basic education by around 0.7% of GDP, or $7 billion. At the same time, emerging budget pressures resulting from the global economic slowdown have placed an increased premium on equity. Governments need to develop financing formulas that prioritize need, ensuring that the poorest regions and social groups are targeted for support.

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

Accelerated progress towards the Education for All goals requires donors to honour the overall aid commitments made in 2005 and step up their commitment to basic education. The challenge is greater than previously assumed, even given the increased commitments by national governments. Taking into account the additional financing needs of reaching the marginalized, the global gap is around US$16 billion, with sub-Saharan Africa accounting for around two-thirds of the gap. In the forty-six low-income countries covered in our survey, aid levels 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 pressures. There is a danger that these pressures will result in lower levels of public spending on education, or even budget cuts. As the 2015 target date for achieving the Education for All goals approaches, it is vital that donors move urgently to close the financing gap. An Education for All pledging conference should be convened 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 Declaration on Aid Effectiveness. While there have been improvements, aid often comes with unnecessarily high transaction costs associated with poor coordination, failure to use national systems and a preference for working through projects.

Low-income developing countries could increase spending on basic education by around 0.7% of GDP, or $7 billion

NGO interventions that are successful in reaching marginalized populations should be integrated into national education systems

Increases in aid levels need to be accompanied by a shift in priorities towards greater support for basic education in low-income countries. While there has been an overall move in this direction since the Dakar commitments, several donors need to review the balance of their support for different levels of education. Donors must also scale up aid to countries affected by conflict.

8. Strengthen the multilateral architecture for aid to education

International aid for education needs a stronger multilateral framework for cooperation, which would increase financial resource mobilization and keep education at the centre of the international development agenda. The current structure, the EFA Fast Track Initiative, requires fundamental reforms. The FTI should be reconstituted as an independent organization outside the World Bank, with developing countries given a greater voice in governance at all levels. FTI reform should draw on the experiences and lessons of global health funds and other initiatives. These initiatives have mobilized new and additional 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. Donors should act to mobilize the US$1.2 billion required to meet anticipated Catalytic Fund financing requirements.

Effective multilateralism in education will require wider institutional changes. The EFA High-Level Group should work towards the development of a more results-oriented structure, with a more focused agenda and strengthened follow-up.

9. Integrate provision by NGOs within national education systems

Non-government organizations have been at the forefront of efforts to provide education opportunities for marginalized groups. Many NGOs are delivering education in slums and remote rural areas. They are also working directly with child labourers, pastoralists and children with disabilities, and have been at the forefront of efforts to provide 'second chance' education opportunities. NGO interventions that successfully reach marginalized populations should be integrated into national education systems.

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

Overcoming marginalization is about changing policies and power relationships. Legislative action can help expand disadvantaged groups' entitlements to resources and services. Laws can establish the principles of non-discrimination and equal opportunity. But legislative action is most effective when it is accompanied by social and political mobilization. From the civil rights movement in the United States to the indigenous peoples' movements of Latin America, civil society groups have played a key role in forging the alliances and framing the demands that have driven change.

At the international level, civil society organizations ensure that the voices of the marginalized are heard in intergovernmental forums. They can also hold aid donors and governments to account for pledges made at Dakar to achieve Education for All. The Global Campaign for Education, a broad coalition of NGOs, teacher unions and other civil society groups, plays a vital role in this area.

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

Reaching the marginalized

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

A decade has passed since world leaders adopted the Education for All goals. While progress has been made, millions of children are still missing out on their right to education. *Reaching the marginalized* identifies some of the root causes of disadvantage, both within education and beyond, and provides examples of targeted policies and practices that successfully combat exclusion. Set against the backdrop of the global economic crisis, the Report calls for a renewed financing commitment by aid donors and recipient governments alike to meet the Education for All goals by 2015.

This is the Summary of the *EFA Global Monitoring Report 2010*. The full Report, as well as comprehensive education statistics and indicators, and editions in other languages, are available online at www.efareport.unesco.org.

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EFA GMR EDUCATION FOR ALL GLOBAL MONITORING REPORT

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Breaking barriers, education holds the key, Cape Verde.
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