'Scaling up' good practices in girls' education

GIRLS
TOO!
EDUCATION FOR ALL

UNGEI

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Contents

List of acronyms

CAMFED	Campaign for Female Education
CBO	Community Based Organization
CEDAW	Convention on the Elimination of All Forms of Discrimination against Women
COE	Centre of Excellence
DFID	Department for International Development (UK)
DISE	District Information System for Education
DPEP	District Primary Education Programme
ECCE	Early Childhood Care and Education
EFA	Education for All
FAWE	Forum for African Women Educationalists
FSSS	Female Secondary Scholarship Scheme
FTI	Fast Track Initiative
GEM	Girls' Education Movement
GENIA	Gender in Education Network in Asia
GER	Gross Enrolment Ratio
GMS	Gender Management System
GPI	Gender Parity Index
HIV/AIDS	Human Immunodeficiency Virus / Acquired Immunodeficiency Syndrome
IMF	International Monetary Fund
MDG	Millennium Development Goal
MS	Mahila Samakhya
MTEF	Medium Term Expenditure Framework
NER	Net Enrolment Ratio
NGO	Non-Governmental Organization
PAGE	Programme for the Advancement of Girls' Education
PMIS	Project Management Information System
PRSP	Poverty Reduction Strategy Paper
RGBI	Rwanda Gender Budgeting Initiative
SGB	School Governing Body
SIP	Strategic Issue Papers
SSC	Secondary Schooling Certificate
SWAP	Sector Wide Approach
UEEP	Universal Elementary Education Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNGEI	United Nations Girls' Education Initiative
UNICEF	United Nations Children's Fund
WEF	World Education Forum

Foreword

It remains a stubborn fact that girls continue to comprise the majority of out-of-school children and women the majority of the world's adult illiterates. As long as they do, the Millennium Development Goals (MDGs) and the Education for All (EFA) goals are at risk.

The United Nations Girls' Education Initiative (UNGEI) was launched at the World Education Forum on Education for All (EFA) in Dakar, Senegal (April 2000). UNGEI's aim is to raise awareness of the importance of educating girls and to generate support nationally, regionally and internationally for this crucial task. Part of this effort involves advocating for increased investment in girls' education, and informing policy-makers about what impedes the full participation of girls in school and society and which practical efforts are most effective in redressing this situation.

This publication is one example of UNGEI's advocacy. It originates from two technical meetings on the scaling up of good practices in girls' education. The first meeting, held in Nairobi, Kenya in June 2004, was devoted to sub-Saharan Africa. It was the outcome of collaboration among a number of UNGEI partners, notably the United Nations Children's Fund (UNICEF), the World Bank, the United Nations Educational, Scientific and Cultural Organization (UNESCO), the Forum for African Women Educationalists (FAWE), the African Development Bank and the Commonwealth Secretariat. The second meeting, similar to the first, was organized by the Commonwealth Secretariat for South Asia and was held in Chandigarh, India in September 2004. Key issues were also discussed at a Ministerial Consultation organized in conjunction with UNESCO's International Conference on Education held in Geneva in September 2004.

The UNGEI partnership is well demonstrated by this publication. Showing UNGEI to be a valuable framework for sharing experiences and strengthening South-South collaboration, this report presents a wide range of successful examples of small-scale interventions in girls' education and also highlights the preconditions for taking such experiences to scale.

Unless good practices in girls' education are 'scaled up,' the achievement of the 2005 gender parity goal, the 2015 gender equality goal and other MDGs and EFA goals will be further threatened. This demands a sound analytical understanding of what drives gender equality and education reform, drawing lessons from projects and policies that have yielded successful results and replicating them elsewhere, with due attention to the underlying dynamics of social and educational change.

An education grounded upon equality is not a fanciful dream but an attainable prospect. This publication helps us understand what to do and how to do it.
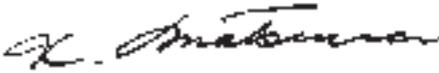
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Executive summary

This publication focuses on the key issues to address and strategies to put in place in order to meet international targets and national goals for universalizing girls' access to, retention in and completion of quality education. The right of all children to education that is free from discrimination and of a sufficient quality to enable their full participation in society has been a goal emphasized through all major modern universal rights treaties, and development discourses. In particular, the Convention against Discrimination in Education, 1960, and the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW), 1979, have defined discrimination in many spheres, including education, as a violation of universal rights. The Convention on the Rights of the Child, 1989, has made the promotion of free primary education and quality education an obligation for governments to respect for children and youth up to the age of 18 years.

The strong case for promoting universal rights and gender equality in education has been supported in more recent international documents. Girls' and women's education has been embedded in these international visions of development priorities. Two goals lay out the priorities for attention to gender issues in education. These are: (a) eliminating gender disparities in primary and secondary education by 2005; and (b) achieving gender equality in education by 2015. These goals have developed from the 1990 Jomtien World Conference on Education for All (EFA), and expanded in the follow-up World Education Forum (WEF), held in Dakar in 2000. They are supported by the Millennium Development Goal (MDG) for gender equality and women's empowerment.

This publication focuses on the issue of accelerating action through 'scaling up' successful interventions, or components of interventions that are amenable to replication. Much has been learned and documented in recent years about the kinds of policy and programmatic interventions that can have the greatest impact on bringing girls to school. Much less is known about strategies that can keep girls in school and ensure that they receive quality education, but attention has increasingly shifted to learning policy and programmatic lessons in these areas. 'Scaling up' lessons that have been proven effective, however, is not a simple mathematical calculation about multiplying inputs across scale. It requires rigorous learning about the conditions that facilitated success, strategies for dealing with the multiple constraints that emerge in the course of programme or policy implementation, and the management of economic and social uncertainties that may disrupt the everyday schooling participation of girls.

Achieving gender parity – the equal enrolment of boys and girls in education – has seen significant progress, though international data suggest that there are still disadvantaged groups that need to be reached. These are groups that may be disadvantaged because of geography, social identity or physical ability, for which special measures that can be integrated with the schooling system as a whole need to be developed.

Achieving gender equality, however, is a steeper challenge. This requires the institutionalization of non-discriminatory measures that ensure that, within an overall commitment to gender equality, there is redistribution of opportunity and of resources, to enable girls to overcome what are often entrenched social biases against their equal participation in society, economy and politics. 'Gender equality in education' thus focuses on both equality of opportunity and equality of treatment. This recognizes that to secure equal outcomes from education for both women and men, there is a need to focus on gender equality in the *process* of education – whether girls and boys have the same opportunities in education (rather than access to education of unequal quality), are equally treated within education processes, and whether education unlocks equal opportunities for men and women post-schooling.

Lessons from experience show that for change in favour of gender equality to become a reality, it is not just a question of more educational resources being required for women, but also education with *empowering* content and processes. Where women have access to resources, they can become drivers of their own change processes. Ensuring that the content of education is empowering will help accelerate the process whereby women and young girls can serve as change agents within their communities to demonstrate the value of girls' and women's education, and by embodying the rights that are being sought on their behalf.

What, then, does the transition from parity to equality mean? It means intervening more proactively to address the structural roots of gender inequalities. It means taking actions on multiple fronts to question the norms and social rules that construct the identities of men and women in ways that keep them in positions of inequality, where their contributions are differentially valued, and hence are rewarded unequally. Put another way, focus on parity through access measures has created a shift in gender relations. For the shift to deepen and sustain – for these changes are still vulnerable to changes in wider economic and social structures – attention is needed to the gendered terms on which girls and boys enter and participate in schooling systems. For countries that are still lagging behind in achieving gender parity, strategies that address structural roots of inequality more proactively may help them move faster towards achieving both sets of goals in the desired time frame.

In this publication, we focus on some of the well-known lessons of what constitutes 'good practice' for girls' education, and synthesise some of the lessons that are evident about the underlying conditions that give rise to, and sustain these forms of good practice. Numerous initiatives – led by governments, by Non-Governmental Organizations (NGOs) and supported by donors and international civil-society organizations – have contributed to creating a groundswell of change, from a historical perspective, in relatively short periods. Much of the promotion of education in recent decades has rep-

resented significant change in many societies, particularly in terms of dissolving resist-ances to the participation of women in public life to some extent. Implicit in attempts to 'scale up' is the importance of ensuring that we know the comparative advantages of different kinds of action in order to achieve a co-ordinated, multi-pronged, partnership-based approach. Experiences from 'scaling up' gender-equality initiatives in education were documented in 2004 in two workshops, organized by the United Nations Girls' Education Initiative (UNGEI) partners. This publication draws mostly, but not solely on the case studies and reports that resulted from these workshops.

Lessons from good practices reviewed for this publication demonstrate the bias in education policies in developing countries towards targeted 'girls' education' initiatives, with far less attention paid to the kinds of systemic reform required by a commitment to gender mainstreaming. While targeted interventions send out clear messages about the value placed by state/intervention on girls' and women's education, and also help to accelerate change in the education access of disadvantaged groups and girls through the creation of specific measures – on their own they may do little to alter systems of provision in such a way that girls enjoy equality of treatment and equality of opportu-nity once they are within the system. To sustain the changes brought about by targeted interventions that are aimed at acceleration, gender-aware reform of education systems is critical. This suggests a challenge for 'gender mainstreaming' in education that is yet to be addressed.

The review undertaken for this publication points to the importance of a sig-nificant knowledge base, not just on 'what works' but on 'what *makes* strategies work'. Overall, better knowledge of what works and how it works for promoting gender equal-ity in education is an important first step and requires significant investment by donors and national governments in considered empirical research. Syntheses of existing knowledge encounter severe constraints in drawing specific technical lessons from exist-ing knowledge, which may not provide the required information from which lessons can be gleaned.

The publication concludes with the observation of four areas where further work is urgently needed. First, there is a need for detailed work on gender-equality initiatives, investigating how they may be 'scaled up', and the kinds of institutional support required to ensure that the *institutional* lessons of 'what works' are more accurately understood, as relevant to diverse planning and policy contexts. In particular, these assessments need to be made *independently*; that is, they need to be carried out by teams of researchers that are not only constituted by people associated with the interventions, to avoid the risk of selective reporting of lessons. Second, there is the need to identify what initiatives need to be 'scaled up' and how, who the responsible authorities would be, and what kind of institutional support is needed for these initiatives to thrive. This will depend on whether the locus of implementation is at district level or at national level. A third information need is the development of realistic cost models based on analysis of the appropriate level and agents for the implementation of the 'scaled up' activity, and on assessing all possible contributors to the process. Not all gender-equality initiatives will cost the same. Finally, without a discussion of how to improve implementation structures, mechanisms

and procedures, there will continue to be an imbalance between the development of ambitious and progressive policies and their translation into meaningful change on the ground. This is the largest gap evident in the literature on good practices and 'scaling up'. Without technically and empirically based rigorous analysis to inform change and reform, discussions of 'scaling up' will continue to be abstract rather than real.

1.   Introduction

The year 2005 is a critical year for the international education community. It is representing the target year for a set of goals relating to universal primary and secondary education, focusing particularly on reducing gender disparities in these sectors. Most commentators note that this deadline is likely to be missed by a considerable number of countries, some of which have struggled to make significant progress on this front. The Department for International Development (DFID)'s 2005 Girls' Education Strategy highlights the fact that the 2005 Millennium Development Goal (MDG) on achieving equal enrolment of boys and girls at the primary and secondary level is likely to have been missed in more than seventy-five countries. Girls comprise 57 per cent of those out of school. There is a particularly wide gender gap in secondary education.

Urgency in meeting these goals is driven, in particular, by the recognition that education is a fundamental and universal human right. The Convention against Discrimination in Education (1960) and the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW) (1979) have defined discrimination as a violation of universal rights. Article 1 of the Convention against Discrimination in Education includes in its definition of discrimination, 'any distinction, exclusion, limitation or preference which, being based on race, colour, sex, language, religion, political or other opinion, national or social origin, economic condition or birth, has the purpose or effect of nullifying or impairing equality of treatment in education'. Article 10 of the Convention on the Elimination of All Forms of Discrimination against Women, which enshrines the principle of women's rights to non-discrimination makes clear governments' roles in ensuring non-discrimination and equal opportunities in all levels and types of education. The Convention on the Rights of the Child (1989) has made the promotion of free primary education and quality education an obligation for governments to respect for children and youth up to the age of 18 years.

International conventions provide policies the status of a legal mandate that governments have accepted as a critical obligation of their membership of the global community. The decade of conferences – the 1990s – saw several international conferences focusing on developing international consensus on common goals in the areas of human rights, women, social development and population and development. Each of these has also elaborated on the rights framework to articulate the role of gender equality in education in pursuance of their different objectives. The Beijing Platform for Action (Strategic Objective B: Education and Training of Women) outlines a great number of actions for governments and civil-society actors to pursue within the field of educa-

tion, in order to secure women's rights to education. These are based on recognizing the interlinkages between education and a range of other important issues for gender equality.

The strong case for promoting universal rights and gender equality in education has been supported in more recent international documents. Female education has been embedded in these international visions of development priorities. Two goals lay out the priorities for attention to gender issues in education. These are: (a) eliminating gender disparities in primary and secondary education by 2005; and (b) achieving gender equality in education by 2015. These goals have developed from the 1990 Jomtien World Conference on Education for All (EFA), and expanded in the follow-up World Education Forum (WEF), held in Dakar in 2000. They are supported by the MDG for gender equality and women's empowerment.

The Jomtien consensus of 1990 advocated a universal approach towards the achievement of EFA by 2000, though it did note the importance of country-level action to eliminate social and cultural barriers that result in the exclusion of girls from the benefits of regular education programmes. The Dakar Framework for Action adopted at the WEF recognized that the targets were not reached by 2000, and shifted target years to 2015 (in line with the international development goals). The consensus at the WEF reflects recognition that specific actions were required from different international and national actors in order to accelerate progress. This resulted in an expanded set of policy goals, both specifying free and compulsory primary education as a critical goal, as well as quality of education. The WEF framework specified targeted groups rather than a more general 'universal' approach, and included targets for both parity and equality across access and achievement (Rose and Subrahmanian, 2005).

The costs of missing these goals are now well known. For example, the Development Committee (2003*a*) report suggests that the costs of not meeting gender-parity commitments includes a missed opportunity to: (a) increase per capita growth by 0.1-0.3 percentage points; (b) lower fertility rates by 0.1-0.4 children per woman; (c) lower rates of under-5 mortality by 5.8 per 1,000 live births; and (d) ensure lower prevalence of underweight children under 5 by 2 percentage points. Such a computation of the costs of not meeting EFA targets on gender highlights the interlinkages between education and other MDGs. The *EFA Global Monitoring Report* (UNESCO, 2003*a*) makes a strong case about interlinkages – not just from the point of view of beneficial effects of education, but also in terms of factors that contribute to persistent gender inequalities in education. Understanding and addressing the implications for girls' education of inequalities in access to labour and employment opportunities, poor health and nutrition, amongst others, is critical. Investments need to be nurtured for several years to come to ensure sustained change in girls' education, as well as the sustained impact of girls' education on other dimensions of development, such as child health.

The need, therefore, is for urgent action to identify and implement the most effective ways to help countries that have fallen way behind in this task to make progress. These include, primarily: (a) learning from what has been established to work in countries that are making progress; (b) identifying key levers and adapting them to local

contexts in order to produce locally grounded approaches; and (c) accelerating progress in a sustainable fashion.

The challenge is twofold: first, access of girls from socially excluded groups (ethnic minorities, oppressed castes, ultra-poor, migrant, geographically remote, and disabled) remains a major challenge. Thus, strategies for promoting gender parity need to be located within a wider understanding of social exclusion. Second, attention is required to the quality of education, both the processes of learning transaction, as well as the quality of inputs, such as textbooks. Accelerating access to schooling and promoting quality education in ways that are responsive to gender, as well as other social inequalities, provide the essential preconditions for achieving the gender-parity goals, and making progress towards gender-equality goals at all levels of education.

Accelerating progress on girls' education rests on mobilizing greater amounts of political will and capacity – not just for gender equality in education, but also for institutional reform and gender mainstreaming. Pilot projects offer important means to experiment with innovation in the way in which education services are provided, or in the ways in which communities are engaged with education provision. However, projects are also often the only means of effecting change where systems of provision are resistant to reform and change. Projects may thrive or be necessary because, or in the face of, the failure of policy and institutional reform processes. Building commitment to signal wider systemic change necessitates: (a) signalling a policy priority for girls' education with resources to support this priority; (b) putting in place institutional reforms to reorient systems to clear qualitative outcomes with regard to gender equality in education; and (c) monitoring change processes and learning from their outcomes. Each of these areas demands a significant commitment to change, and will come with costs and challenges. While the benefits of such change are broadly known and widely touted by international agencies and national governments, these costs have been rarely analysed with respect to gender equality.

'Scaling up' reflects the urgency felt in the international community to accelerate progress in girls' and women's education in order to promote gender equality more broadly. For this to take place, significant effort is needed to promote gender equality within education. Gender equality is both a means and an important end of Education for All. This demands significant analytical understanding of what drives both gender equality as well as education reform, learning from both projects and policies that have yielded successful results, and replicating them with attention to the underlying drivers of change. Learning from projects can also help identify what efforts need to be made at policy level to facilitate institutional change.

This process entails significant challenges: in particular, 'scaling up' lessons from projects into policy formulations is not as straightforward as may be hoped. There are several relationships within the configuration of projects, policies and institutions in education that need to be examined. These include the relationships between: (a) educational and gender-equality change processes; (b) change processes and policy and institutional structures that are in place; and (c) policy structures and reform processes and the wider politics of bringing about change. Better knowledge in each of these arenas,

learning from and about change is not yet sufficiently comprehensive when addressing gender-equality issues generally, as well as in education. As the World Bank (2004*a*, p. 8) notes, development literature 'has largely ignored the underlying processes and systems for institutions to innovate, fail along the way, learn from that failure and continue to expand'. This necessitates focus on not just 'right policies' but also 'right institutions' and 'enabling politics'. Lesson learning on the latter two dimensions in relation to gender equality in education remains very weak.

About this publication

This publication builds on what is now a significant body of learning on levers that work in favour of positive change in girls' schooling, and contribute to the promotion of gender equality in education. Our analysis focuses on the lessons of these experiences of change in favour of girls' education, so that we may better know what actions to accelerate in order to meet the EFA gender targets of 2015. The contextual dimensions of change in relation to both gender relations and educational progress are well recognized. As Aiyyar (1996, p. 348) notes, 'universal prescriptions have no more relevance than universal history'. Understanding the interface between context-specific processes and wider national policies and institutional frameworks is far more complex than is often accepted in generic policy documents. Acceleration does not mean simply 'doing more of what works' on a larger scale. First, what works at local level may not be amenable to larger-scale replication, and thus requires recognition and analysis of the roots and routes of change processes (Samoff and Sebatane, 2001). Second, the achievement of gender equality means going beyond expanding access to analysing and addressing the unequal distribution of opportunities in education and society more generally (UNESCO, 2003*a*). Both these factors are fundamental to a realistic understanding of how progress towards eliminating gender disparities and promoting gender equality in education may be achieved.

While progress on EFA goals up to 2005 may not have yielded uniform global results, the spotlight on gender disparities in education has focused attention on what works, why and under what conditions, in terms of influencing change. Although this knowledge is also uneven, as Kane (2004) effectively demonstrates from her analysis of project documentation in African countries, there is a sufficient database that can guide future developments. Translating this knowledge into action is the challenge to which this publication is addressed.

Numerous initiatives – led by governments, by Non-Governmental Organizations (NGOs) and supported by donors and international civil-society organizations – have contributed to creating a groundswell of change, from a historical perspective, in relatively short periods. Much of the promotion of education in recent decades has represented significant change in many societies, particularly in terms of dissolving resistances to the participation of women in public life to some extent. Implicit in attempts

to 'scale up' is the importance of ensuring that we know what the comparative advantages of different kinds of action are in order to achieve a co-ordinated, multi-pronged, partnership-based approach. Experiences from 'scaling up' gender-equality initiatives in education have recently been documented in two workshops, one in the African region (UNGEI, 2004) and one in South Asia (Commonwealth Secretariat, 2005). This publication draws mostly, but not solely on the case studies and reports that have resulted from these workshops.

This publication attempts to fill a gap in existing knowledge in the field of gender and education. There have been both useful syntheses of knowledge on 'what works' in gender and education, as well as some focus on 'engendering' national strategies and plans, as well as international agendas and approaches. However, there is a 'missing middle' which refers to the processes whereby 'what works' at local levels can be built upon and translated into education reform, thereby embedding gender-equality strategies in wider access and quality reforms. Analysis of this 'missing middle' can also help to explain why the 'engendering' of national and international frameworks may be as flawed or as unsuccessful as much of the literature suggests. Much of 'what works' has been learned from studies of micro-level projects and targeted interventions within wider education programmes. Translating these lessons – which link more broadly to understanding processes of social change, not just educational change – into sectoral reform processes remains a challenge. However, we are hampered by limitations in the existing knowledge base on how small projects can be 'scaled up' in cost-effective ways to ensure large-scale coverage.

A central question is about the relationship between 'gender mainstreaming' and 'scaling up'. In this publication, we see the issue of improving theory and practice on gender mainstreaming as a central strategy for achieving 'scaling up'. As Moser et al. note (2004, p. 2), gender mainstreaming is 'the internationally agreed strategy for governments and development organizations to achieve the commitments outlined in the Beijing Platform for Action'. Gender mainstreaming is seen as a necessary strategy to prevent the repeated marginalization of women's needs, and to address inequalities in power relations between women and men, not just in 'society' but also within development institutions. Thus, gender mainstreaming has been, and continues to be seen as a necessarily 'transformative' strategy (Kabeer and Subrahmanian, 1999) – transformative particularly of the development institutions and the 'male bias' (Elson, 1991) of the 'lens on reality' (Kabeer, 1994) that was embedded in development thinking, policy and practice.

Most approaches to gender equality recognize the importance of both targeted approaches, as well as gender-aware reworking of institutions to meet gender-equality goals. 'Mainstreaming gender equality' refers to the commitment to ensure that both women's and men's concerns are integral to the design, implementation, monitoring and evaluation of all policies and programmes, in order that both women and men benefit equally. While this does not preclude targeted programmes aimed specifically at women (or men), it requires that these targeted programmes are part of an overall strategy that is both gender-aware and gender-responsive.

However, in practice, gender-equality initiatives in education continue to be associated more with targeted programmes for girls, or what is referred to as 'girls' education'. That is, they tend to be concentrated on special measures that can bring girls into school. However, that is only one of several steps towards gender equality in education. For sustained change, education systems need to be transformed so that they systematically address inequalities within the schooling process, and build generations of gender-aware citizens, committed to tackling inequalities and disparities in the recognition that these are to the detriment of the wider public good. The kind of systemic change required for gender equality is, however, often considered too sensitive or difficult, and not seriously pursued by governments. The difficulties of reforming systems from a gender perspective have been well identified (Goetz, 1997). Gender mainstreaming is widely considered to have been a disappointment if not quite a 'failure' (Subrahmanian, 2004*a*). While education policies in most countries make extensive reference to the benefits of investment in girls' education, most governments are yet unwilling and/or unable to transform education systems and institutions to make gender-aware planning a reality at all steps of policy-making and implementation. The creation of specialized 'gender' units within departments and ministries has been insufficient to the task as they have largely been under-resourced, resulting in little capacity development, and the lack of power to enforce recommendations for change. As a result, contrary to intentions, gender issues have been continually seen as a separate issue from the mainstream of educational planning and policy (Rose and Brown, 2004).

Targeted interventions send out clear messages about the value placed by the state/intervention on girls' and women's education. They also help to accelerate change in the educational access of disadvantaged groups and girls, through the creation of specific measures. However, on their own, they may do little to alter systems of provision in such a way that girls enjoy equality of treatment and equality of opportunity once they are within the system. To sustain the changes brought about by targeted interventions that are aimed at acceleration, gender-aware reform of education systems is critical. This suggests a challenge for 'gender mainstreaming' in education that is yet to be addressed.

'Scaling up' girls' education will largely rest on the ability to succeed in mainstreaming gender across educational planning and implementation. In particular, institutional dimensions of educational implementation will be critical to take forward and embed progress towards parity, and more critically, towards equality in education. What lessons have been learned from both successes and failures of mainstreaming efforts in the recent past that can inform renewed efforts? This is a question fundamental to the achievement of international goals. Some lessons are already suggested in existing literature (see for example, Rose and Brown, 2004), including: (a) the need for a clearly allocated budget; (b) terms of reference that are agreed and accepted across the organization concerned; (c) trained personnel; and (d) an enabling environment that accords political status to facilitate the influence of gender strategies on planning and implementation.

Concerted investment in financial and human resources and technical skills and capacities will make the difference that is being sought. This is a key message that this publication conveys, based on surveyed examples and cases.

This publication provides both analysis and a few guidelines, drawing on lessons from numerous initiatives in South Asia and sub-Saharan Africa. This effort comes with several caveats. First, there is often a significant leap between analysis and guidelines, with analysis suggesting complexities and nuances that generalized guidelines – with their emphasis on simplification and generalizability – are likely to contradict. Second, with respect to the analysis attempted of the 'missing middle', drawing lessons from existing research and materials is often fraught with the difficulty of understanding the underlying orientation of the existing research or gaining sufficient insight from material that is often descriptive (Samoff, 1996; Kane, 2004). Learning from projects is hampered by the fact that many (if not most) accounts tend to be promotional of the concerned intervention rather than oriented to learning from it. Such promotional material may suggest ease where there has been difficulty, and gloss over areas where little change has taken place. Further, such material may be constrained from putting forward an honest discussion of constraints and obstacles, where there are multiple relationships, and the survival of the intervention at stake. Learning from institutional reform, or even about institutional functioning, particularly from a gender perspective, is rendered almost impossible because of the paucity of sufficient case material of gender-equality oriented change initiatives *within* education systems or bureaucracies. Lastly, the dilemma of drawing generalized conclusions or approaches from diverse contexts is apparent. Samoff (1999, p. 252) points out that despite the diversity of African countries studied by donor agencies as part of reviews aimed at shaping the aid agenda, 'those documents had generally similar assumptions, methodologies, observations, conclusions, and recommendations'. Samoff and Sebatane (2001, p. 17) note that 'the determination of 'what works' and what is 'successful' is in part, perhaps a very large part, contextual and contingent . . . we must be careful . . . to recognize that the generalizations that seem well grounded must be interpreted in the context of specific initiatives and settings'.

The rest of this publication is structured in five chapters. Chapter 2 provides a conceptual map to the terms 'gender parity' and 'gender equality'. Chapter 3 discusses lessons from operational approaches, distinguishing between targeted, systemic and enabling approaches. We identify lessons from both experience on addressing gendered constraints in gaining access to education, as well as those that relate to institutional efforts to address quality reforms. There is a far richer body of literature on the former than the latter, though the focus on quality reforms is fast becoming an area of attention and importance. Chapter 4 provides an overview of definitions of 'scaling up'. Chapter 5 focuses on lessons from and for efforts to 'scale up' girls' education. Chapter 6 brings together the analysis of gender-equality reforms and the policy and institutional dimensions of 'scaling up' to provide a map of how to proceed, identifying key steps and some analytical guidelines that can help the process.

2. Defining the challenge: gender parity, equality and equity

Clarifying the concepts

'Gender parity in education' is a foundational commitment of EFA. Measured as the female to male ratio value of a given indicator, gender-parity measures the *equal participation of boys and girls* in different aspects of education. Gender-parity indicators are static, measuring the numbers of girls and boys with access to, and participating in education, at a particular moment (Subrahmanian, 2005). The gender MDG focuses on the relative proportions of girls and boys in school (Gender Parity Index – GPI). However, progress in the GPI does not guarantee high numbers in school, nor does it measure improvements in the quality of the schooling experience for girls.

'Gender equality in education' focuses on both equality of opportunity and equality of treatment. This recognizes that to secure equal outcomes from education for both women and men, there is a need to focus on gender equality in the *process* of education – whether girls and boys have the same opportunities in education (rather than access to education of unequal quality), are equally treated within educational processes, and whether education unlocks equal opportunities for men and women post-schooling. The *EFA Global Monitoring Report* (UNESCO, 2003*a*) views these as interlinked dimensions of a rights-based approach: equal access to schooling, equality within schooling, and equality through schooling.

It is important to distinguish between 'gender parity' as a quantitative progress indicator and 'gender equality' as a qualitative progress indicator. Gender parity can be treated as a 'formal' equality measure of numerical 'gaps' between female and male in relation to access to schooling. Gender equality is a more substantive concept, recognizing that women and men start from different positions of advantage, and are constrained in different ways. Hence, equality of outcome is an important measure, recognizing that equal access alone (parity) may not translate into meaningful processes and outcomes in education (Subrahmanian, 2005).

However, equality of outcome is not easy to measure or achieve. Hence, a preferred definition of equality may not refer to pre-specified outcomes, but instead relate to the broader principle of 'non-discrimination'. For example, CEDAW has non-discrimination against women as the substantive thread, bringing together various dimensions of social, economic and political life. Similarly, in education, attention to gender equality could focus on *quality of experience* of education, in terms of entering education (access), participating in it (participation) and benefiting from it (achievement and outcomes).

Such a conceptualization also suggests that promoting access is not sufficient, and that attention needs to be paid to the challenges of quality. This is now increasingly the conventional wisdom in international education policy discourse. The link between gender equality in education and the quality debates needs to be more strongly emphasized. While we suggest above that promoting gender equality is a matter of quality education – and hence equal treatment and opportunities for girls and boys in schooling – equally this implies that promoting quality education is a matter of ensuring that educational inputs and processes are reviewed and reformed through a 'gender' lens, to ensure that quality reforms build on an understanding of the common and separate needs of boys and girls, and women and men in education.

There are two interrelated challenges at stake – the need to accelerate progress on girls' access to education, and the need to animate this access with a concerted effort to promote greater equality between men and women more generally. Global measures focus on promoting girls' education in the form of ensuring the achievement of gender-parity goals (achieving equal participation of girls and boys in all forms of education based on their proportion in the relevant age groups in the population). As a statistical snapshot, gender-parity measurements offer a valuable insight into the achievements of girls relative to boys in a given context. Changes in access to education also indicate some shifts in the demand for girls' education, which has the potential to unleash other changes. However, movement towards 'gender parity' over time in a country could also reflect the declining participation of boys, and hence must be analysed carefully, alongside net enrolment figures, which indicate progress towards universal education.

However, there is an increasing concern that gender parity alone is not a sufficient account of what access to education means to girls, particularly in terms of gender equality (ensuring educational equality between boys and girls). A focus on gender equality in education takes us beyond measuring the progress of girls' access to, and participation in education, to asking how access to education can contribute to transforming the conditions within which that progress is being achieved, and whether these conditions will transform sufficiently to ensure that these gains are sustainable.

In addition to the guiding concepts of 'parity' and 'equality', many commentators use the language of 'equity' to indicate the type of redistributive policy approach that can redress discrimination and biases against investment in female schooling by states, societies and families. At a recent conference,[1] the suggestion that gender 'equity' be used as a conceptual guide and measure of progress was strongly endorsed. Gender equity was viewed as a comprehensive concept that included both ideas of parity and equality, but further emphasized two important dimensions of the challenge: linkages with *other forms of exclusion*, with gender injustice understood as operating within a wider sphere of social injustice, and the importance of *the kind of education* that could achieve the desired outcomes in relation to social justice. This formulation emphasizes both the redistributive as well as the transformative dimensions of change: gender

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1. *2005 and Beyond: Accelerating Girls' Education in South Asia*, organized by the UNICEF Regional Office for South Asia, Bangkok, 7-9 February 2005.

equity requires both that resources are redistributed to correct social injustices in the distribution of opportunities and resources, and that education plays a transformative role in tackling these injustices (UNICEF, 2005). Box 1 provides an example of an equity approach.

Box 1: Equity and rights: the United Nations Educational, Scientific and Cultural Organization (UNESCO) Convention against Discrimination in Education (1960)

An example of an 'equity' approach can be drawn from the UNESCO Convention against Discrimination in Education, referred to earlier. Articles of the Convention lay down the principle of removing discrimination on any ground in access to education (**justice**) or in processes within education (**equal treatment**); approving the establishment of different institutions or special measures to address the effects of discrimination (**redistribution**); and enshrining a vision of education that views it as a means for the 'full development of the human personality' directed to the 'strengthening of respect for human rights and fundamental freedoms', and promotive of 'understanding, tolerance and friendship among all nations, racial or religious groups' (**transformation**). The Convention recognizes the possibility of social exclusion within societies, based on minority statuses determined by identities such as nationality, ethnicity and religion, and affirms the rights of excluded groups to have a choice (where they desire) in the place and mode of their instruction, while at the same time affirming their rights to participate fully in society.

The concept of equity needs to be distinguished from the concept of *'equivalence'*, which is often used to argue for redistribution of resources based on existing divisions of labour and responsibilities within a given society. An argument for 'equivalence' in the distribution of resources and opportunities seeks not to transform, but to ensure that the distribution of resources increases in line with what are considered to be the formal acceptable roles and statuses of women in a given society. Examples of equivalent policies are those that justify the unequal inheritance rights of females relative to males as reflective of women's roles in society as daughters or sisters, and secondary breadwinners; in education, this might mean limiting the education that girls receive to particular subjects that are seen as culturally appropriate or relevant for females in society. Redistribution without an effort at transformation can be seen as drawing on a concept of 'equivalence' rather than 'equity'. Equity seeks to correct or redress past inequities with additional resources and transformative methods; equivalence recommends resourcing based on the status quo, and hence not intervening to make a positive change.

However, policies based on equivalence may be important drivers of gender parity in education, as they may create spaces for girls' and women's education even within narrowly defined terms. For example, the orientation of policy in Iran towards gender equality generally, and also in relation to education, have undergone changes, drawing from a base in 'equivalence' as an approach (see Box 2). An 'equivalent' approach fol-

lowed by the state in policy formulation also matched the nature of demand for girls' education, as families that may have been concerned about the liberating impact of education on women were comforted by the more conservative policy approach. Through an equivalence-based approach, however, educated women in Iran began to constitute a 'critical mass', and through their entry into professions and employment have pushed for wider changes, reflected in the current emphasis on empowerment, and providing the impetus for a shift to an equality-oriented approach. Ensuring sustained investments in girls' and women's education may, in some cases, yield results for gender parity, and women may use the spaces offered to help push societies towards greater gender-awareness and change.

Box 2: Achieving gender parity in education: from equivalence to equality

Iran's achievement of a Gender Parity Index of 0.98 in primary education, and 0.92 in secondary enrolment demonstrates the rapid strides made in narrowing gender gaps in primary and secondary schooling. Educational policies of the state have actively encouraged female schooling, but in a way that has closely reflected the wider socio-political environment in Iran, particularly in the post-revolution era since 1979. For example, the three pillars of Islamization, politicization and equalization, have combined to ensure equal opportunities for girls in access to schooling, though shaped and circumscribed by the ideologies of Islamization. All three components have played an important role in shaping the content and direction of education at all levels. Three distinct phases in post-1979 policy-making can be identified, including a revolutionary phase where education was seen as a tool of politicization and Islamization, and women were viewed predominantly as martyrs and mothers. In the subsequent 'reconstruction' phase, educational policies reflected the importance of educating women and girls, but in keeping with their roles in family and society, emphasizing the sanctity and the stability of the family. Finally, in the current phase of reform, gender equality and women's empowerment is emphasized more, with education in particular viewed as the means to provide women more space to understand their rights and strive for them independently.

Source: Mehran (2003).

Concepts serve as normative frames, and are used differently by different actors. While the concept of parity is quantitative and hence easily standardized, concepts of equality are less clearly elaborated, and the usage varies from context to context. In every context, these words will have different resonances, based on wider political and social discourses that prevail. Building agreement on what these terms mean cannot be treated as a 'given' but require constructive engagement and communal shaping if they are to be institutionalized in the everyday practice of institutions and actors.

Moving towards gender equality:
operational implications

What, then, does the transition from parity to equality mean? It means intervening more proactively to address the structural roots of gender inequalities. It means taking actions on multiple fronts to question the norms and social rules that construct the identities of men and women in ways that keep them in positions of inequality, where their contributions are differentially valued, and hence are rewarded unequally. Put another way, focus on parity through access measures have created a shift in gender relations. For the shift to deepen and sustain – for these changes are still vulnerable to changes in wider economic and social structures – attention to the gendered terms on which girls and boys enter and participate in schooling systems is needed. For countries that are, as yet, lagging behind in achieving gender parity, strategies that address structural roots of inequality more proactively may help them move faster towards achieving both sets of goals in the desired time frame.

Thus, in order to consider progress, both quantitative (gender parity) and qualitative (gender equality) assessments need to be made within an overarching commitment to gender equality, suggesting that advancing girls' education needs some attention to changing the underlying conditions under which access and participation in education are being promoted. Achieving gender parity is just one step towards gender equality, in and through education. An education system with equal numbers of boys and girls participating, who may progress evenly through the system, may not in fact be based on gender equality. Further, a qualitative approach will also help to uncover the sensitivities of working on girls' education within a wider understanding of other complex social issues, recognizing that not all women in a given society are disadvantaged in the same ways (Subrahmanian, 2005).

These conceptual distinctions are necessary to develop, as they offer a solid basis on which to ground strategies, their operationalization and the assessment of impacts. Distinguishing between gender parity and equality as different poles on a continuum helps us to applaud the achievement of parity, but not treat it as the end process of collective striving. A dual approach is thus necessary to focus both on 'girls' education' as a political priority and 'a gender approach' as a way of signalling the understanding that this priority means addressing how identities of gender (how gender roles and gender relations are shaped in a given society) may shape the prospects and opportunities for schooling and education for boys and girls, and women and men. Such a distinction may also help to distinguish between the value of targeted approaches on the one hand, and the value of a set of strategies that addresses issues of gender inequality in all aspects of education policy, programming and practice on the other. Both types of strategy are important, and will be variously feasible in different socio-cultural settings. In most cases, however, there is likely to be a combination of systemic and targeted approaches.

Finally, and critically, the empowerment of women and girls is cited as an important developmental objective. The MDGs view education as a means to achieving the

empowerment of women. However, the role of empowering processes in helping to achieve gender equality in education must be emphasized. 'Empowerment' is not only an end, but also an important means for achieving educational goals in a sustainable manner, building on women's and girls' own perspectives on what they consider desirable change, and developing their capacities to develop and articulate these perspectives. Empowerment is a complex process, bringing together individual capacities and structures of opportunity (Alsop and Heinsohn, 2005). This suggests focusing simultaneously on both developing the capacities of girls and boys to address gender inequalities, and also creating enabling institutions that can provide opportunities for, or build these capacities. The implication of an 'empowerment' approach to gender equality is that educational processes should focus on the capacities and skills they create in young women and men to tackle gender inequalities through forming new and more egalitarian social relationships (see Box 3).

Box 3: Educating women through an empowerment approach: Mahila Samakhya in India

The Mahila Samakhya (MS) experience since 1989 offers an example of the importance of empowerment of women as a critical precondition to facilitate greater inclusion of women and their daughters into education. This programme of the Department of Education, Government of India, funded with external support in its first sixteen years, has provided an important alternative approach to women's mobilization and empowerment. It eschewed economic development as the entry point in favour of political mobilization through awareness-generation and collective strategy development.

The impetus for the programme came from the National Policy on Education of 1986, which paid great attention to gender inequalities in education and committed state policy to using education as an 'agent of basic change in the status of women'. The vision of empowerment entailed an explicit commitment to the redefinition of education as an enabling and empowering tool, as a process that would enable women to 'think critically, to question, to analyse their own condition, to demand and acquire the information and skills they need to enable them to plan and act collectively for change'. Education, it was agreed, must therefore help women to question rather than accept, enable them to affirm their own potential and sustaining processes that would enable them to move from situations of passive acceptance of their situation, to assertion and collective action – in short to take control of their lives; and building conscious and independent collectives of women (*sanghas*), which would initiate and sustain social change processes.

By placing the empowerment agenda in the hands of collectives of women at the village level, Mahila Samakhya has seen the emergence of a locally articulated development agenda, including health, livelihoods, income generation, savings and credit – with women developing their own strategies to address issues of importance to them. This includes participation in local governance, ensuring the effective functioning of government service delivery and dealing with broader social issues that have a negative impact on women's lives – such as male alcoholism and violence.

The greatest impact of women's mobilization has been in the area of girls' education. Often, women have taken the difficult decision of withdrawing children (especially girls) from work and providing them an opportunity for education. Many women have been motivated to bring a change in the lives of their daughters, to ensure that they have better opportunities and a different life from that of their mothers. Sending children/girls to schools or residential learning centres established by the programme means, in several cases, acting against long-standing social norms (such as child marriage) by postponing marriage for several years. Women are also actively engaged in ensuring that the education system is effective, through the monitoring of schools, and actively participating in school bodies (such as the village and school education committees). One of the most important markers of this sense of ownership has been the degree of voluntarism and financial support that the women's collectives provide to start various education interventions and bridging courses run by the programme in the different states where the programme is functioning.

Source: Jandhalya (2003).

3. Advancing gender equality: lessons from good practice

Challenges and opportunities for girls in education

Several recent reports[2] highlight challenges for gender parity and equality in education to which responses need to be oriented. These include factors related to the 'demand' for education. Some of the key issues raised by these studies are briefly summarized here – each of the reports merits a separate reading.

- *Domestic responsibilities*, causing girls to drop out of school at an earlier age than boys. This is linked to the high opportunity costs of girls' education, where girls perform a vast array of unpaid domestic tasks that release adult (female) labour for productive work.
- *Social norms that discourage female autonomy and hence education*, such as early marriage, dowry practices, and taboos and harmful practices related to sexual maturation.

Supply-side constraints include:

- *The distance of schools* from the habitations of marginalized groups is a significant factor affecting access, with particular concerns for girls' safety.
- *Unfavourable school environments* that reinforce low expectations from girls' education, through non-provision of facilities required by girls (such as sanitation facilities for adolescent girls, protection from abuse by peers and/or teachers, infrastructure to address safety concerns including well-lit roads and transport arrangements).
- *Direct costs of education* that act as a constraint on girls' participation based on the perception of low economic returns to female labour.
- *Lack of female teachers and lack of gender-awareness of teachers* affect the environment within the classroom, reducing potential role models, and reinforcing the symbolic association of the school space with male authority.

The creation of formal measures alone is not sufficient to address gender discrimination. Constraints to the participation of women alongside men in community-based bodies that are set up to manage schools locally, such as School Governing Bodies (SGBs) or vil-

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2. As mentioned earlier, there has been much focus in the lead up to 2005 on capturing knowledge on 'what works' for securing girls' access to and participation in education. These studies and syntheses include Kane (2004), papers commissioned by DFID (Rose and Brown, 2004, Swainson, 2004) preparatory to the production of their strategy paper of 2005 (DFID, 2005), and Herz and Sperling (2004). Further, global reports such as the *EFA Global Monitoring Report* published by UNESCO (2003*a*), *A Fair Chance for All*, published by the Global Campaign for Education (2003) and UNICEF's *State of the World's Children* (2003), also cover the ground of lessons and challenges in girls' education.

lage education committees, result in wider social norms governing ideals about gender relations not being challenged even if women's participation is mandated through policy mechanisms such as quotas. Following through policies that create formal 'seats at the table' for women, with attention to the 'informal' spaces where 'real' decisions are made, needs greater focus (see Box 4).

Box 4: Discrimination at the Coalface: an example from South Africa

Despite impressive legislation in South Africa aimed at promoting the rights of black people, women and people with disabilities, discrimination against women continues because of long-standing perceptions of appropriate behaviour and responsibilities for men and women, especially in relation to public spaces. A case cited in Ramagoshi (2005) of SGB in rural South Africa illustrates this well:

> …a woman [was] short-listed for a principal's post and then invited for an interview. When she got into the room, she was told, 'Sorry madam, but you are in the room where we are having interviews for the principal's post'. She told them that she was indeed there for the post of the principal. They asked her name and, as fate would have it, her name, Ayanda, can be given to both males and females. Because she did not use a gendered prefix, like Miss/Mrs, the panel assumed she was a man. To cut the story short, Ayanda was not given the post because she was a woman. In that village, they wanted a man who would be able to talk to the chiefs, and they wanted stable families. As a single woman, she would 'start trouble' because, according to the SGB, boys and married male teachers would be attracted to her. To add insult to injury, she was told that if she were married, at least her husband could have assisted her in running the school!

Source: Ramagoshi (2005).

While these constraints are well known, responses to them have to be treated as an intersecting package of reforms, rather than piecemeal interventions to address specific constraints. Both access and quality reforms together can help progress the agenda towards gender equality in education. However, as the diverse constraints outlined above suggest, reforms within education alone are not sufficient to tackle constraints to girls' access and participation in schooling. While supply-side reforms are critical to ensure equal treatment of girls and boys within schools, demand-side interventions that tackle wider social and economic constraints emanating from within the family, the community and the market are equally important. These interventions can be categorized as 'targeted interventions', 'systemic changes' and 'creating enabling environments'. Such a distinction is preferred to the more conventional distinction between 'supply-side' and 'demand-side' interventions as most current interventions are a combination of the two.

'Targeted interventions' are those that identify a specific subgroup of the learner population for whom constraints arise out of specific and identified social structures. Targeting groups by gender, income poverty, social inequality based on caste, race

or ethnicity, or on the basis of disability, within broader education programmes is a well-established approach within access reforms. Targeting girls is the most common approach followed by governments to yield speedy results in expanding their access, either as a subset of a broader identified group such as the poor or more generally, treating women as a whole as a disadvantaged group. Targeted programmes can be focused particularly on addressing the direct and opportunity costs of education through scholarships, admission quotas, or subsidies for the indirect costs of schooling such as textbooks. Special measures – such as allowing girls a second chance to enter school if they have dropped out – can also be instituted to provide encouragement to targeted groups. In some cases, single-sex schools may be important – particularly at upper primary and secondary levels – to encourage parents to send daughters where they may have anxieties about the cultural inappropriateness of co-educational schooling. Access expansion may also be done through targeting particular geographical areas where out-of-school children are concentrated, or where schools are fewer than necessary. Low levels of girls' and women's education can be a criterion for selection of provinces or districts in large education programmes such as the District Primary Education Programme (DPEP) in India (see Box 11) and the Education Enhancement Programme in Egypt (World Bank, 2004*a*).

However, targeting girls generally, or within particular social groups, while necessary to ensure that resources reach those who most need them, is also fraught with difficulties. Targeted investments can: (a) be prone to leakage or corruption; (b) be administratively costly to manage, given the levels of accurate information required to make sure the resources are being justly distributed; and (c) be politically unpopular (see Box 8). A well-known consequence of separate targeted initiatives aimed at improving access is the potential negative impact on participation through the school cycle. Targeted access reforms are attractive to governments because they represent 'quick wins' and help motivate bureaucrats and other stakeholders through demonstrating visible changes in a short time-span. Yet, the gains of these can also be quickly lost, as demonstrated in the continued high rates of dropout, a danger where access reforms have resulted in the neglect of improvements in quality (Rose and Brown, 2004).

'Systemic reforms' refer to universal access and quality reforms. Universal access reforms include those that focus on expanding provision of schooling infrastructure and strengthening the environment in which schooling takes place. Quality reforms include those that address the content or mode of provision of particular educational inputs, such as revising curricula and textbooks, or improving teachers' skills in gender-aware teaching and learning methods. Access reforms will also include expanding the range of types of schools that are available to out-of-school populations, through pluralism in provision involving NGOs, Community Based Organizations (CBOs) and other non-state providers. The expansion of education provision creates knock-on effects for management systems, including regulation, training and inspection. Quality reforms may also take the form of management reforms such as decentralization; and reforms of systemic design and management including improved monitoring and evaluation systems, and inspection systems.

'Creating enabling environments' includes intervening in the community through debates and discussions on gender issues, mobilizing mothers to participate in community forums or user committees, creating awareness of the importance of education of girls through folk media, media campaigns and wider mobilization. Enabling initiatives are necessary not just to stimulate demand, but to sustain it by continually supporting efforts to track out-of-school children, work with parents to identify reasons for dropout, and find solutions to particular constraints faced by girls – such as the pressure to marry early, amongst others. The role of mothers can be important in encouraging girls' education at local level (Grown, Gupta and Kes, 2005) as is gender sensitization and mobilization within communities, with school management committees and pupil-teacher associations potentially playing an important role.

Interventions that are aimed at creating enabling environments play a powerful role where they result in developing capacities through demand mobilization and awareness generation. Many examples of interventions exist in Africa, which focus directly on mobilizing young girls and boys to discuss issues that concern them. The creation of these spaces provides rich ground for building up the confidence and articulation of both boys and girls to tackle gender-based stereotyping in their everyday lives. For example, several interventions address the HIV/AIDS pandemic focus on school girls, creating peer networks to discuss issues relating to sexuality and reproductive health, and to learn about prevention and protection methods. These include the *Tuseme* ('Let's Speak Out') clubs started by the Forum for African Women Educationalists (FAWE) chapters in several countries including Ethiopia, the Gambia, Kenya, Namibia, Rwanda, Senegal and the United Republic of Tanzania. While these clubs are focused on girls, including other members of the community (particularly adolescent boys) would be critical to sustain change.

Table 1 provides some examples of all three types of intervention that have significant impact on girls' education, with examples of each from some of the countries where these initiatives are being implemented indicated in brackets.

These categories of approach are complementary, often overlapping, and their separation is an analytical device that is not meant to suggest that they offer distinct policy approaches or choices. For example, many of the interventions listed as 'targeted' could become systemic, if 'scaled up' and implemented as universal programmes. The Midday Meal Scheme in India is an example of a scheme that evolved from an incentive programme to encourage out-of-school children to attend school (through the provision of grain in return for a minimum level of school attendance) and was subsequently universalized within a broader conception of the right to nutrition for school-going children.

This threefold distinction is meant to show that action needs to take place for: (a) learners; (b) the education systems in which they participate and learn; and (c) their families, communities and wider environments. All three types of intervention are critical for change. Changes in the ways in which teachers interact with learners may lead them to engage more directly with parents and children in their home and community environments, thereby creating an enabling environment within the community. Further, bridging these different approaches is essential. Experiences with successful change processes

suggest that focus on 'the client' is essential for reforms to succeed (World Bank, 2004*a*). This does not just suggest attention to clients in relation to demand-side mobilization, but also allowing clients to influence the design of delivery systems, improving transparency in the implementation of policies and transfer of resources. Similarly, laws that promote compulsory education are both enabling in that they signal political commitment to education, but also mandate special targeted provisions that enable disadvantaged groups to access education as part of that commitment.

**Table 1: Examples of interventions
for promoting gender equality in education**

Targeted (mostly access)	Systemic (universal access and quality)	Enabling (mostly access, also sustaining change)
Affordable schooling by cutting the costs of school fees (China, Kenya, Malawi, Republic of Korea, Sri Lanka and the United Republic of Tanzania) and also supplementing household access by covering indirect costs, providing cash transfers that compensate for the opportunity costs of children's income such as scholarships, and stipends (Bangladesh, Brazil, Colombia, Kenya, Mexico, Nicaragua and Pakistan)	Reducing the distance between home and school through schooling expansion (Egypt, India, Indonesia)	Re-entry policy for pregnant girls and adolescent mothers (Zambia)
Special measures to encourage schooling – e.g. giving girls a second chance to enter schools after dropout (Egypt)	Separate latrines, ensuring privacy and safety for girls, training to handle sexual maturation, and sanitation facilities (Uganda)	Mothers' clubs fostering mother-to-mother interactions and intense mobilization campaigns for girls' education (the Gambia)
Single-sex schools at upper primary/secondary levels, in some cases with residential facilities (India)	Providing female teachers (Bangladesh)	Empowering mothers through organizing women to articulate and act on their needs, leading to greater support for their daughters' education (Mahila Samakhya, India)
Alternative schooling to help out-of-school children gain access to formal schooling through special study courses (Bridge Schools, India)	Gender mainstreaming through women's affairs departments at all levels of government (Ethiopia)	Girls' Education Movements (GEM) developing leadership skills for young girls, working with boys as allies and partners (South Africa, Uganda)
Emergency schooling camps in situations of conflict (Sierra Leone)	Pluralism in provision encouraging innovation (Bangladesh and Mozambique)	Boys' Empowerment Programme, to include boys in discussions about gender-based violence through workshops (South Africa)
	Role of NGOs in reaching out to hard-to-reach groups (Bangladesh, Burkina Faso, India)	Community mobilization (Bangladesh, Colombia, India, Mali, Pakistan)
	Disaggregated data collection from school level upwards (Egypt, India)	
	Encouraging teachers to engage with communities to overcome inhibitions about female schooling (Kenya, Uganda)	

Sources: UNGEI (2004), UNICEF (2004), Unterhalter et al. (2004), Commonwealth Secretariat (2005), Ramagoshi (2005).

Lessons from experience
about the conditions underlying good practices

The importance of simultaneous and complementary reforms. Both Bangladesh and Egypt have developed a mixed package of reforms combining demand mobilization through awareness-raising, supported by financial incentives such as scholarships and subsidies, reducing the distance between home and school, providing sanitation facilities and increasing the number of teachers (World Bank, 2004a). However, education reforms alone may not bring about the desired changes in the social and economic circumstances in which learners go to school. In addition, wider economic and social changes also play a critical role in creating the environment for rapid progress towards parity and equality. Box 5 highlights this with examples from Bangladesh. Similarly, Unterhalter et al. (2004) show how, in Uganda, a combination of factors – greater employment opportunities encouraging investment in schooling for girls, active engagement of teachers in promoting gender equality and the integration of gender issues in teacher training – all combine to foster progress towards gender equality.

**Box 5: Gender parity in Bangladesh:
purposive actions to build on wider processes of change**

The spectacular achievements in Bangladesh in relation to girls' education are increasingly receiving attention. These achievements were built on multiple strategies working together: (a) mass expansion of schooling availability; (b) encouraging pluralism in provision, including schools run by the state, faith-based and NGO actors; and (c) targeted interventions that provided incentives to alleviate demand-side constraints such as the real and perceived high costs of education (particularly for girls) through the provision of stipends and subsidized food.

However, the role played by wider social and economic changes, including the 'political economy' of Bangladesh society and its internal social structures, is equally important. Changes in economic opportunity, especially pressures on land and on agriculture as a source of employment, coupled with changes in family structure caused by divorce and practices such as dowry, have also fuelled the greater demand for education for both boys and girls. Elites have also played an important role in championing universal education, resulting in a political will to expand education and increase state financial allocations for education.

The Bangladesh case illustrates the important role of purposive policy actions to stimulate as well as to respond to changes in the wider socio-political and economic environment. Building on internal forces of social cohesion – such as the will of elites – policies have successfully offered a package of reforms, with spectacular results for girls' opportunities in education.

Source: Hossain (2004).

At a micro-level, the FAWE 'Centre of Excellence' (COE) schools have demonstrated how a package of interventions can transform individual schools with direct impacts for learners (see Box 6). There are eight centres in six countries, the Gambia, Kenya,

Namibia, Rwanda, Senegal and the United Republic of Tanzania, developing holistic packages that improve the quality of schools from a gender perspective. This is achieved through gender sensitization of all stakeholders; in-service training in gender-responsive pedagogy for teachers; reproductive health training; and scholarships for girls in need (UNGEI, 2004).

**Box 6: Centre of Excellence schools:
demonstrating how schools can be transformed**

FAWE's partnerships with governments in many African countries have been based on demonstrating, through practical examples, how schools can be transformed in line with visions of greater equality and quality. As one of FAWE's 'demonstration interventions', a COE school is one 'which clearly and effectively demonstrates a holistic, integrated approach to the task of improving girls' educational opportunities, by creating an enabling environment for learning and teaching'. Gender-responsiveness is an aspect of all its components: physical infrastructure, the social environment and the academic environment.

COE schools demonstrate the interlinkages between the individual school and a wide web of actors – from learners, their parents and communities, to civil society, ministries of education, other line departments, the media and donors.

Source: Mlama (2005).

Linkages between special measures and formal systems of provision. While special measures such as alternative schools or non-formal schools are critical for giving equality considerations a launch pad and a preliminary boost, they are likely to be unsustainable if links with the formal system of provision are not made early. A government pilot scheme to 'scale up' Early Childhood Care and Education (ECCE) in the Indian state of Assam was forced to change strategy when the broader education programme, the DPEP of which it was a part, ended. One of the problems identified was the inadequate linkage of the ECCE component with the formal school, which meant that when the umbrella programme, under which it operated, finished, the ECCE innovation had no budgetary or administrative cover to enable it to continue (Commonwealth Secretariat, 2005). This reflects the problem of separating equality-oriented programmes into 'special schemes', which are then seen as time-bound additions to the formal system, rather than integral components of education reform. On the other hand, the Government of Andhra Pradesh, India – which has established several residential bridge schools to help out-of-school girls to integrate into the formal school – is seeking to make bridge schools a part of a concerted, networked action, and not isolated institutions set up wherever children are out of school (Commonwealth Secretariat, 2005).

Different countries follow approaches that are suited to their particular national discourses and trajectories. These particularities are important to bear in mind when looking at what approaches can be 'scaled up' most quickly. Case studies of successful 'scaling up' in education from three different countries illustrate this (World Bank, 2004*a*). Bangladesh's

reforms have been largely focused on promoting access through rapid expansion of schooling, but at the expense of quality and at the expense of targeting socially excluded minorities and remotely located groups (World Bank, 2004*b*). China has focused on quality education as its trigger for change, and is also paying attention to remote groups and ethnic minorities (World Bank, 2004*c*). El Salvador used parents as the key driving force in implementing reforms, channelling resources directly to community organizations and mandating communities to manage education services, including hiring teachers (World Bank, 2004*d*). South Africa's Department of Education has been able to initiate several important measures to address sexual abuse in and through education, which are influenced by the wider policy mandates of tackling discrimination post-apartheid, the HIV/AIDS pandemic, as well as high rates of violence (see Box 7).

Box 7: South Africa's Department of Education takes measures to tackle sexual abuse

Several measures and resources to address the prevalence of sexual abuse and violence in schools have been developed, including:
- Life skills for sexual abuse prevention introduced through the curriculum.
- A Creative Arts Initiative to provide learners with opportunities to speak out about sexual abuse and related issues.
- Disciplinary measures and sanctions against teachers committing crimes against children.
- Module developed for educators at province and sub-province levels to help with managing sexual harassment and gender-based violence.
- Development of resources including a handbook and a workbook to help educators address violence in schools through focusing on school-level policies and management practices.
- Sexual harassment guidelines.
- Teenage pregnancy guidelines.

Source: Ramagoshi (2005).

'Scaling up' girls' education will therefore link to the feasibility of wider reforms, which in turn depend on the developmental trajectory and position of any given country at a particular moment in time. Much will also depend on the collective value placed on education, which itself is shaped by historical processes.

Political will makes a critical difference (Rose and Brown, 2004). Without political will and champions who exert influence both over the public and politicians, the increased resource allocations required for gender parity will not be achieved or sustained, and the kinds of qualitative reforms required to reorient systems of provision to more sensitive engagement with gender issues will be harder to push through. In particular, the social changes that are brought in by co-education in terms of the impact on relationships between boys and girls, and the vulnerability of girls when they enter new public spaces such as schools and hostels, all need to be supported by sensitive administrators and teachers. Without political champions who highlight and take up

issues relating to violence against girls, or the importance of safety, interest in the qualitative aspects of gender equality is likely to be weak and parental concerns will not be adequately addressed.

Political champions also play a critical role in helping governments deal with backlash against particular policy provisions for girls, where it is perceived that girls are benefiting to the exclusion of boys. Parental reactions to the Female Secondary Scholarship Scheme (FSSS) in Bangladesh (see Box 8) are a case in point (Mahmud, 2003). Correcting inequalities and institutionalized 'male bias' requires medium-term 'female bias' in the knowledge that all interventions that are aimed at promoting girls' access to education are in the long-term beneficial to society more widely and do not entail more than 'perceived' short-term costs for boys (UNICEF, 2003). Political champions will play an important role in defending 'female bias' and explaining its rationale.

Creating and sustaining enabling environments are the critical factor in establishing change. Social change of the kind required to sustain gains in gender parity, and build progress towards greater gender equality, require investments in communities and people, while simultaneously encouraging or fostering new opportunities, and building incremental systemic change. In particular, these include facilitating women and girls to develop critical capacities to deal with social constraints to their participation in public life and schooling. As the World Bank (2004*a*) notes, where governments take a 'big-bang' approach, 'scaling up' access rapidly and within a short period, opportunities may be missed for building the sort of incremental change that supports long-term reform, as in the case of Turkey (World Bank, 2004*e*) and Bangladesh (Box 5).

Both girls' education initiatives and mainstreaming gender into education systems are critical for boosting girls' access to schooling and sustaining change towards gender equality. Reaching out-of-school girls through targeted approaches is critical, while simultaneously ensuring that the education system becomes gender-responsive so that girls stay within the system, and also work with boys to understand and change gender norms in society that perpetuate inequality. Yet there is a need to have a systematic approach – even to the targeted girls' education initiatives that are put in place and to study the achievements of targeted projects and systemic reforms or 'mainstreaming', particularly with respect to the promotion of gender equality. Ramachandran (2004) notes that the impact of targeted initiatives has been limited because they have been implemented in a piecemeal fashion, and that there is no comprehensive quantitative information on coverage or qualitative information on the impact of localized initiatives. Better knowledge of what works and how it works for promoting gender equality in education is a significant first step and requires significant investment by donors and national governments in considered empirical research. Syntheses encounter significant constraints in drawing specific technical lessons from existing knowledge, which may not provide the required information from which lessons can be gleaned.

Box 8: The Female Secondary Scholarship Scheme in Bangladesh: policy choices and dilemmas

Largely on the basis of the 'success' of pilot interventions to provide stipends to girls enrolled in secondary school, the Bangladesh Government launched, in January 1994, a nationwide stipend programme for girls in secondary school (grades 6-10) in all 460 *upazilas* (sub-districts) of the country, with support from the World Bank, the Asian Development Bank and the Norwegian Agency for Development Co-operation. This was known as the Female Stipend Programme. At present stipends are also provided to girls in higher secondary grades 11-12.

After the initial emphasis on closing the gender gap in access to secondary education, which constituted the overriding aim of the programme at the beginning, it has now moved into a second phase. The emphasis in the second-generation projects is increasingly on improving the quality of secondary education and on financial sustainability. This programme has been described as 'the world's vanguard programme of this type' with significant lessons to be learned about whether the effects of the programme in changing behaviour and norms are sufficiently profound, and would be sustained even if the financial incentives were withdrawn.

The present system provides free tuition and stipends to all eligible female secondary school students enrolled in recognized institutions outside the metropolitan areas. To be eligible for a stipend a girl must attend school for at least 75 per cent of the days of the school year, she must achieve at least 45 per cent marks on her evaluations and examinations and she must remain unmarried. These requirements reinforce the strategic goals of increasing access by paying part of the cost to parents and to schools; improving quality by putting pressure for good performance; and delaying girls' marriage to achieve social and demographic goals.

Stipends are awarded in two instalments annually to the girls, directly through their accounts in *upazila* branches of a nationalized bank. If bank branches are more than five kilometers from the school, bank officers open temporary booths at the school premises to allow girls to withdraw the stipend money. This bank has obtained the necessary government permission to allow minors to open accounts. Girls open accounts, receive passbooks and chequebooks and learn how to operate an account. Participating institutions receive tuition fees in two semi-annual instalments against each stipend awardee, and three months' tuition for all recipients of grade 10, to compensate for the period before the Secondary Schooling Certificate (SSC) examination.

The success of the programme has come with several important policy questions. The programme is of universal coverage of the female secondary school-age population – i.e. it has gone 'to scale' – and has made a significant impact on girls' secondary school participation, with related effects such as delaying the age of marriage and increasing the employability of girls. However, one central question is whether the programme is better off targeting more needy girls, thereby allowing an increase in the value of the stipend to a level that addresses costs more realistically. A second issue pertains to targeting boys where there is some evidence of declining boys' enrolment in secondary school, an issue that is raising questions at community level about the preferential targeting of girls. These deeper policy choice issues underscore the complexities of identifying the right levers, their potential costs, and the trade-offs that accompany pro-girls' and women's education policies.

Source: Mahmud (2003).

4. *Taking girls' education to scale*

Conceptualizing 'scaling up' for girls' education

The range of social, economic and political constraints to achieving gender parity and equality in education has been well recognized. Many commentators have argued that independent strategies addressing specific constraints are unlikely to be as effective as a package of cross-cutting initiatives and multi-sectoral reforms aimed at tackling a range of constraints on both the supply and demand sides (Kane, 2004, Colclough et al., 2003). Putting these in place at a level of scale that makes a significant and speedy impact on gender equality in education is a significant challenge, far greater than that of isolated projects operating in contexts that may be amenable to instituting change processes. 'Scaling up' suggests acting in concerted yet multi-sectoral ways, across a diverse range of contexts, in ways that respect that diversity. This suggests that building upon existing approaches and ways of thinking are important to ensure that local actors are critical partners together with whom change can be defined and shaped.

Box 9: Key strategies for 'scaling up' girls' education

- Targeting disadvantaged populations with extra allocations of resources to overcome demand-side constraints.
- Reforming systems including teacher training, curriculum and pedagogy.
- Improving accountability of services through improved disaggregated data collection, monitoring and evaluation systems that feed back into the design of policies and programmes, through building effective review mechanisms.
- Developing effective partnerships between multiple providers to ensure concerted action which would need better regulation systems with criteria for ensuring gender-awareness.
- Working with communities in a sustained manner to support changes in norms around appropriate roles and actions for boys and girls, to strengthen change agents to deal with potential resistance or backlash.
- Developing strong legal frameworks that support the above changes.

The discussion in the previous chapter suggests strategies for 'scaling up' girls' education (Box 9). These need to form part of a concerted overall package of policies and pro-

grammes, and need to be supported by sufficient administrative reforms to ensure that implementation does not fail ambitious policy agendas.

As Kane (2004) notes, success has mostly been demonstrated through small- or medium-scale projects. In many cases, lessons from successful interventions have been adopted by governments and implemented at a level of scale. However, although there have been changes in *what* governments do for girls' education, there has been less of an impact in terms of changing *how* governments do it. The key challenge lies in moving from specialized targeted interventions for girls, often run by, or in partnership with NGOs, to mainstreamed interventions that create new forms of working that are gender-aware, as well as more broadly responsive to the social contexts in which policies are implemented. In particular, focus on the capacities and skills of intermediary organizations – those units or systems of governance, both bureaucratic and political (such as local government, provincial and district administration) that operate below national policy and are responsible for everyday implementation and management – seems to have scarcely occupied attention, even though they will play a critical role in facilitating 'scaling up'.

Samoff and Sebatane (2001, p. 6) formulate a broad conception for 'scaling up' in education:

> 'Scaling up' in education is intended to expand access and improve quality for more people over a wider geographical area, and to do so in ways that are efficient, equitable, and sustainable. Since education is central to development, the strategies adopted to promote reform by enlarging the scale of effective pilots must address the broader development objectives of empowerment, equality, social transformation and sustainable change.

'Scaling up' is considered a desirable process, but also a process that is hard to define. 'Scaling up' is usually sought to both accelerate progress as well as for seeking to make the best use of limited resources – i.e. achieving 'economies of scale'. 'Scaling up' is also seen as important for 'grounding' reform by drawing on local experiences to inform macro-level service delivery reform. 'Scaling up' should not be seen as replacing diverse approaches with 'one system'. Rather, systems and innovative projects need to be seen as complementary and be more closely linked together. 'Scaling up' is in fact necessary to support local innovation as small projects do not work in a vacuum. Even if a local innovation has emerged in response to specific problems, failures and exclusions, in most cases the actors and actions (whether teachers, parents, learners) are implicitly linked to the formal system. Projects serve as an important ground for experimentation, crucibles of learning, necessary to deal with diversity. When explicitly linked to larger systems, they offer a valuable space for experimentation and learning, and can feed rich and new ideas into the larger systems.

The discussion about reforms for advancing gender parity and gender equality in education is fundamentally a discussion about processes of social change, given the deep-rooted attitudinal barriers that exist more generally towards the advancement of girls and women. Linking social change processes to purposive policies and institutional systems is at the heart of 'scaling up'. The World Bank (Development Committee, 2002)

has recently focused on 'scaling up' in relation to poverty reduction and has defined 'scaling up' in several different ways: both in terms of achieving outcomes commensurate to the scale of the objectives and challenges; and in terms of implementation. Thus 'scaling up' is seen as emphasizing both appropriate policies aimed at defined and desired outcomes, as well as appropriate implementation structures. In this conception, 'scaling up' is also understood to focus attention on learning – how to learn about processes of change, and set them in motion; and on institutions – how to embed these processes of learning and change in institutional and organizational cultures. Most importantly, as with all change processes, there are challenges of politics, as institutional and other cultures are engaged in processes of reform that may encounter resistances. Figure 1 captures these ideas in the form of a "scaling up' spiral" for achieving gender equality.

Fig. 1: "Scaling up' spiral"
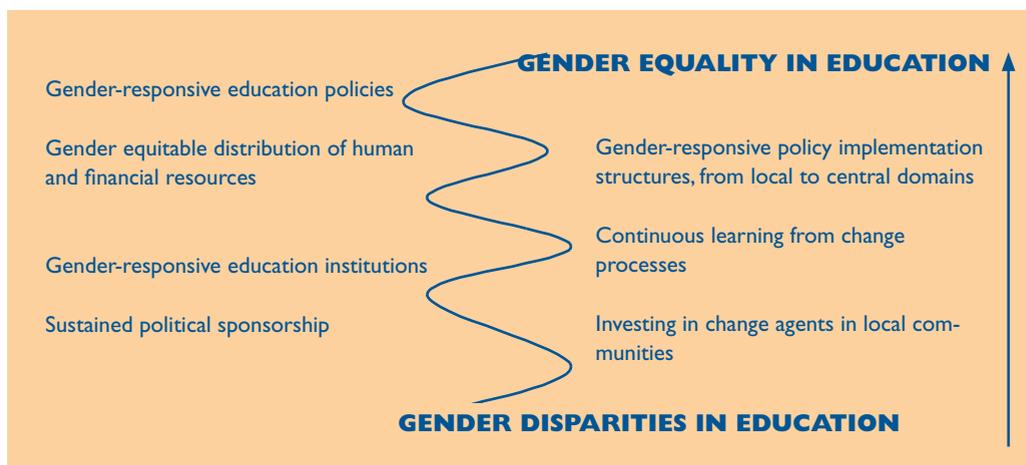
A year-long process of learning based on 'scaling up' successful efforts to reduce poverty globally (World Bank, 2004*a*, p.1) identified four dimensions for learning from change: (a) institutional change – change in the rules, norms, behaviours and organizations; (b) experimentation and learning – how change is learned from and adapted to different contexts; (c) political leadership and commitment – how different interest groups and coalitions support change; and (d) supportive external environments – how external environments can catalyse and sustain change.

'Scaling up', therefore, should be viewed more importantly in terms of enabling and supporting change in a way that maximizes the potential of resources to achieve an impact – in particular, looking at how innovation can be supported through developing institutional and systemic capacity, and can inform policy directions and visions from this rich experience. Such an approach recognizes that, first, not all things that are successful in driving change are amenable to 'scaling up' – i.e. they may succeed only

because they operate in micro contexts; also in addition, that what may best help is not the replication of specific elements of a programme, but the conditions that allowed for success, and the local roots that can sustain the change (Samoff and Sebatane, 2001).

'Scaling up' is not just a quantitative concept. More importantly in the context of the complex inequalities of class and gender, and the ethnic, religious and other diversities that constitute the experience of education deprivation, 'scaling up' also refers to finding more widespread ways to make systems respond to such diversities, and to find more effective ways to target resources.

As the World Bank (2004*a*) notes, '. . . getting to scale is not a short, smooth, linear process – it is long, messy, arduous, and unpredictable'. Samoff (1996, p. 268) argues that for education, this arises from the difficulty of disentangling cause and effect:

> Cause and effect are very difficult to establish clearly in education, which is an intricate web of processes, some integrally related and others distantly connected. Mapping those links is a frustrating and usually contentious undertaking . . .

'Scaling up' implies that there is sufficient understanding about what triggers positive change, and that the challenge lies in achieving this at a pace and with the scope to positively benefit as many individuals as possible. This points to the importance of a significant knowledge base not just on 'what works' but on 'what makes strategies work'.

Why should we 'scale up'?

The impetus for 'scaling up' in current international discourse stems from several factors. International agencies need to be able to show to their local constituencies that their investments and energies are yielding significant results. Small-scale or pilot projects may not yield results that are demonstrable at a level of scale that shows significant impact (Samoff and Sebatane, 2001). 'Target-oriented' approaches, such as the MDGs, increase the need for agencies and governments to 'go to scale' in order to achieve the magnitude of the challenge outlined in terms of key development indicators.

Interest in 'scaling up' is also linked to a shift in donor priorities and approaches. Donors now prefer to work in more co-ordinated approaches, pooling resources to work with governments on a coherent agreed set of policy reforms. Project approaches were also divisive of international agencies, often leading to competition rather than co-ordination, and resulting in fractured policy agendas. They also represented high opportunity costs for governments in terms of the costs of dealing with different donors with different policy priorities, discourses and practices. Further, there was a concern that the project approach has 'tended to accelerate rather than retard the deterioration of local institutions and to undermine the foundation needed for long-term sustainability' (Samoff, 1996, p. 268). Problems include bypassing local capacity development, creating small islands of excellence fostered under special conditions not shared by those institutions or providers outside the project environment, and reducing a push for nationally scripted and owned policy strategies that signal long-term commitment to change.

How to 'scale up':
global, national and local partnerships

Acceleration of the pace of change and the 'scaling up' of innovative projects that have demonstrated results in terms of effecting positive changes requires 'new ways of working by most of the agencies involved' (UNGEI, n.d., p. 3). Acceleration and 'scaling up' are both aimed at the same result – the increase in pace of achieving change with the target of 2015 in mind – but the two are not exactly the same. Acceleration requires an increase of political will and greater partnerships in improving the pace of change; 'scaling up' focuses more technically on identifying lessons of positive change and identifying the institutional mechanisms and processes that can take positive change to a greater level of scale and coverage. Both are complementary: the political will and multi-actor collaborations required to support acceleration particularly in terms of making resources more available is a pre-condition for ensuring that innovative approaches that have made tremendous impact at a local scale are taken up with the right balance of policy, institutional structures, mechanisms and resources, and an enabling environment. These require attention to the 'techniques' and practices that sustain change – building capacities through training, incentive structures, monitoring systems, and feedback and review mechanisms, amongst others.

Both acceleration and 'scaling up' require change in terms of countries' ability to adopt significant policy changes, and build the institutional implementation capacity required to achieve and sustain EFA (Development Committee, 2003*b*, p. iii). Without partnerships and co-ordination, successful interventions will be hard to 'scale up'. A wider climate of political commitment to the goals of gender parity and equality is critical, within which different actors are willing to work together, flexibly and responsively, to achieve their common goals. Change in policy and institutional capacity requires change in several interrelated dimensions most of which necessitate new forms of partnership. These dimensions include financial partnerships, agenda-setting partnerships, and implementation partnerships. These further cut across the global, national and local domains where education and gender-equality policies are operational.

Financial partnerships include those between multilateral and bilateral donors and national governments. The Monterrey Consensus of 2002 builds on 'the premise that development aid yields higher returns where countries are accountable for results and where there is a record of successful policy and institutional reforms' (Development Committee 2003*a*, p. iii). In education, this compact, alongside commitments made by donors at the WEF in 2000 to ensure that lack of resources did not act as a constraint to achieving EFA, gave rise to the Fast Track Initiative (FTI). The FTI serves to lever additional resources from donors for education. Countries eligible for support through the FTI are those with 'credible' education plans, and a Poverty Reduction Strategy Paper (PRSP) (Rose and Subrahmanian, 2005). Sixteen countries are currently included in the FTI, with the expectation that more countries will join over the next two years. By 2004, the FTI partnership includes over thirty multilateral and bilateral agencies

and regional development banks, with varying levels of engagement (UNESCO, 2004). Other forms of partnership are bilateral, with various donors supporting budgetary reform processes, pooling their resources through a co-ordinated negotiation process to support national reform strategies and programmes. Budgetary support and sector-wide approaches (SWAPs) require both partnerships between agencies, and between agencies and governments.

Agenda-setting partnerships flow from financial partnerships but are not restricted to them. Clearly, budgetary support agreements rest on co-ordinated policy commitments and strategies, and hence agenda-setting is linked to financial conditionalities that may be attached to budgetary support. These conditionalities could take the form of agreed deliverable outcomes. Foster (2004) explains the distinctions between different types of funding mechanisms and their relationships with government systems. 'Budget support' refers to financial assistance where funds are provided for the government budget, through the Ministry of Finance or equivalent, and spent by the partner government using its own financial management and accountability systems. Space for conditionalities differs with different types of funding modality. 'General Budget Support' is used when there is no or only notional earmarking; 'Sector Budget Support' refers to budget support earmarked for use within education (or other sectors) specifically.

The key feature of the transition is the shift towards 'a process of agencies buying into a number of nationally owned sector development programmes'; in other words from project support to programme support. The rise of programme funding reflects a changing international funding climate where there is a focus on partnership despite declining levels of aid (King, 1999). At the national level, there is also a greater drive for social sector funding, with efforts increasingly aimed at mobilizing internal resources through taxation, community levies, and parental contribution, amongst others. The shift in international support towards nationally owned and framed strategies has therefore broadly been seen as a positive move away from fragmented attempts to innovate and 'scale up' towards more coherent and long-term planning-based support.

Implementation partnerships take the form of partnerships between the state and non-state providers, including 'for-profit' organizations and NGOs. In such cases, non-state providers who step into education service provision, either on account of a perceived gap in the availability and/or quality of public service provision, or because of 'excess demand' leading to the creation of a market in education, may contribute towards meeting Education for All. In the secondary education sector, for example, the high costs of provision relative to the primary education sector – where the latter is a priority – may lead governments to form partnerships with for-profit providers through the provision of subsidies to set up secondary schools for public access. This may also happen in the primary schooling sector, where governments are overwhelmed by the scale of the challenge, or are unable to reach all groups within their population.

Underpinning these different overlapping partnerships is a range of issues relating to education systems. A core issue relates to the education system in a given country context, comprising infrastructure and inputs, professional providers and stakeholder representation. A related system is the financing system that is to ensure that resources

reach the system at all levels of service delivery. This includes budgetary reform, and expenditure frameworks that safeguard allocations from being poached. Management systems are critical for putting in place those institutional mechanisms that can best leverage financial resources for service delivery. These include civil service reform, including addressing conditions and incentives for teacher performance (Development Committee, 2003*a*). Co-ordination is central in this process – co-ordinated investments between sectors (Development Committee, 2003*b*), as well as co-ordination *within* sectors across these dimensions.

Types of 'scaling up'

Samoff and Sebatane (2001) identify different approaches to 'scaling up':

- *'Scaling up' by replication.* A successful model in one place is taken up and adapted to local contexts elsewhere. Examples would include residential bridge schools in India, where out-of-school children, predominantly girls, are provided short-term education courses that enable them to enter formal schools at the right grades for their ages. This model has spread to many states following successful results in particular projects. 'Scaling up' in this form could also be through steady expansion – starting small, increasing gradually and building on success. This model of expansion may yield best results, as expansion is based on identifying what works, and adapting it to different contexts. Another example from India is the Education Guarantee Scheme in Madhya Pradesh, where excluded communities, with little access to education, were rapidly brought within the education system, based on a compact between the state and communities.

Box 10: From consultation to large-scale programme: the Girls' Education Movement

GEM represents a 'girl-centred, girl-driven' approach to policy, spearheaded by FAWE and the United Nations Children's Fund (UNICEF) in twelve African countries, where consultations with young girls on six themes (safety and security, gender in the curriculum, the digital divide, decentralization and financing in education, best practices and excluded children) yielded detailed discussions of problems and appropriate solutions. These consultations were then fed into an interactive policy dialogue environment, where young leaders facilitated a dynamic forum for discussion with national leaders and donors. A Young People's Meeting, followed by a Young People's Parliament, yielded insights and material for the development of an agenda for the GEM, which was then presented at a ministers' meeting. This led to the official launch of GEM by the President of Uganda in 2001.

Source: Garrow and Kirk (2001).

Where communities had no school within reach, they were encouraged to mobilize and demand a school from the state; the state was bound to comply within ninety days. This approach has been replicated in many states and now is a part of the package of educational interventions of central and state governments as part of the wider national Universal Elementary Education Programme (UEEP). Intense advocacy can also help to expand a programme quickly, by setting up participatory consultations with young people and feeding their design of programmes up to ministerial level (see Box 10).

● *'Scaling up' by explosion.* Here, the pilot stage is bypassed and a model is developed to serve an entire country, or large parts of it. For example, the Indian DPEP (see Box 11) built on lessons of innovative NGO-government partnerships in some states, and formulated a package of access and quality reforms that were institutionalized in districts with high percentages of out-of-school children, which of course meant addressing issues of girls' education in particular.

● *'Scaling up' by association.* Here, many distinct efforts are linked together to constitute a large-scale strategy, each functioning in its distinct setting, with distinct approaches and implementation structures. This form of 'scaling up' is hard to map without sound databases at local level, which provide information about the kind of changes that have occurred, and how these have been facilitated by certain policy measures. In addition, scale by association requires like-minded catalysts and nurturers of change working together in different locations to bring about similar results – often difficult to find in a concentrated geographical area.

The 'scaling up' of gender-equality initiatives takes very diverse forms. One model is fairly cost intensive, whereby a successful project is 'scaled up' with external aid resources, and eventually mainstreamed into SWAPs. This is an incremental process, resulting eventually in mainstreaming as a wide-scale programme initiative. In some cases, the key features of the intervention can also form the basis of national policies (for example, Zambia's Programme for the Advancement of Girls' Education (PAGE) and the policy for re-entry of adolescent mothers into school) (UNICEF, 2004). Another model is the creation of linkages (scale by association) between alternative models and mainstream models of education provision, as in India (see Box 16). A third model is through creating gender mainstreaming mechanisms within education programmes to focus attention on gender equality as an issue of special emphasis within a large-scale universal education programme, as in DPEP in India. These include the development of systemic change mechanisms, particularly focusing on data collection and information sharing on different dimensions of education provision. In particular, disaggregated data collection systems were developed that enabled effective monitoring of the functioning of the education system at different levels, such as the Project Management Information System (PMIS) to track physical and financial information, a District Information System for Education (DISE), which collected regular data at school level on enrolment, teacher deployment, classroom and performance indicators, student: classroom ratio, repetition rates, amongst others. Regular monitoring reviews and visits helped to keep the pressure and the visibility on the programme at a high level.

Box 11: District Primary Education Programme: 'scaling up' by explosion

The DPEP was initiated in 1991 with funding from a Structural Adjustment Programme loan from the World Bank to the Indian Government. Building on successive national policy formulations in education since 1986 that recognized the urgency of universalizing education and addressing underlying inequalities in access to education, DPEP covered 271 districts in eighteen states within ten years of its inception. The concept of 'scale' was defined in its design, with the district serving as the basis for holistic planning, especially taking into account disparities by gender, caste and tribal status.

Gender equality has been an integral aspect of DPEP's strategy for Universal Primary Education, evident in the geographical targeting of socially disadvantaged groups to determine the priority focus districts. Districts that received attention in the first two phases of DPEP were those where female literacy was below the national average.

Operating at a considerable scale, DPEP brought in many changes in the way in which elementary education was being administered. For the promotion of gender equality, a substantial architecture has been put in place that has led to greater engagement with gender issues at all levels within the system. These include:

- At national level, a dedicated Director for Gender and Early Childhood Strategies within the Elementary Education Bureau, responsible for gender mainstreaming; a Technical Support Group located in a parastatal organization constituted by educational professionals, who provided research and monitoring support.
- At state level, a Gender Co-ordinator with a catalytic role in facilitating the organization and mobilization of women, the review of action plans and other planning activities; and a State Resource Group established to track girls' education.
- At district-level, a Gender Focal Point at the block/*taluka* levels; with the support of a District Resource Group in some districts. Gender Focal Points at sub-district levels provide support.

The 'chain of command' is thus more visible in the case of gender equality than other forms of equality strategies (for disadvantaged castes, tribal groups). Although there are variations in the functioning of the gender-equality architecture across states and districts, the visibility of gender across the system has been greatly enhanced as a result.

DPEP has been further 'scaled up' by becoming part of the UEEP (Sarva *Shiksha Abhiyan*), in place since 2001. Focus areas for girls' education include issues in: (a) access (infrastructure improvements, targeting the never enrolled, strengthening targeted programmes and incentives); (b) retention (initiatives and incentives to reduce dropouts); and (c) quality of education (teachers' training, curricular reforms, community participation, monitoring systems). Special programmes include the Midday Meal Scheme that provides a cooked meal to every schoolchild, and a scheme aimed at providing residential school facilities at elementary school level for girls belonging to marginalized groups living in remote areas.

Targeted programmes include: (a) camps for out-of-school girls aimed at mainstreaming them into the formal system at the appropriate age-grade level; (b) the provision of free textbooks to all girls and children from scheduled castes and scheduled tribes up to grade 7; and (c) free uniforms and scholarships to be funded by state governments. Specific states also introduce their own incentives for girls' education – for example, in Gujarat, bonds worth Rs.1,000 are given to girls enrolling in Class 1, and are converted after the completion of Class 7. Schools that have achieved 100 per cent girls' enrolment are given cash awards worth Rs.5,000 annually.

Source: Ramachandran (2004), UNICEF (2005).

The financial costs of 'scaling up' constitute the least-discussed aspect in the discussion on accelerating change. Some interventions can be 'scaled up' at minimal cost – particularly those that are aimed at embedding good practice in national policy frameworks or in law. Making a commitment in law or policy such as to the re-entry of adolescent mothers into school, has little financial cost in the articulation of the goal, though there may be some political costs if set in a resistant socio-cultural environment. Translating policy commitments into practice (i.e. implementation) is far more costly if done in a rigorous and thorough manner. For example, the re-entry of adolescent mothers into school requires a range of supportive actions to ensure the policy becomes translated universally into reality for adolescent mothers. These include awareness campaigns, training for educators in implementing the policy including intervening in families and communities, creating crèche facilities (whether through separate institutions or through community-based care) to ensure that the children of young mothers are taken care of during school hours, etc.

While the emphasis in much global literature is on the costs of expanding access, or removing fees, there has been little work to systematically identify good practices that will work well at a level of scale, and to how much these are likely to cost. Many innovative projects have demonstrated low-cost models particularly as they draw on community-provided resources and mobilize local teachers (Herz and Sperling, 2004) who cost far less than formally recruited, trained and organized teachers. Thus, a significant policy shift is taking place in many countries that are accelerating expansion by hiring para-teachers and using community resources to build schools. The quality-equality trade-offs of such cost-cutting measures remain controversial, however, representing a debate that is set to continue.

A broad consensus in much literature is that even though greater resources are required for universalizing education with quality, the long-term returns to education, particularly girls' and women's education, far outweigh the medium-term costs. For gender-equality initiatives, however, costs need to go beyond merely placing a numerical price on the costs of free books, scholarships and stipends, to detailing the kinds of training strategies, awareness campaigns, and the personnel that are required to work with sufficient co-ordination consistently across different sites to make change embed in the education system. These are likely to entail political rather than financial costs, as we discuss later. Grossly understudied are the costs (and assessment of the different resources that different actors bring to the table) of learning from the ground in rigorous and methodical ways, of co-ordinating and communicating the sharing of lessons, and of resourcing alliances and partnerships to accelerate change.

Insufficient attention has been also paid to the absorptive capacities of national and local systems to deal with the scale of resources that are available through external financing sources, and those that are raised by governments. The ability of local governments in particular, to both raise resources and spend large sums of money on local educational priorities, requires far greater attention than perhaps it receives. The under-spending of large budgets (Subrahmanian, 2004a) in many countries suggests that utilization capacities need to be developed alongside strong financial disbursement and monitoring systems.

Box 12: Partnerships for 'scaling up': identifying the strengths of different modes and actors

As Rao and Smyth (2005, p. 10) note, "'scaling up' appears most realistic when a partnership involves members who have the capacity and commitment to learn from practice and disseminate lessons, and others who have positions and resources that allow such lessons to be applied elsewhere and on a larger scale'. The role of civil-society networks such as FAWE and the Campaign for Female Education (CAMFED) in mediating these relationships can be critical.

For effective partnerships, there is a need to recognize the limitations and comparative advantages of different modes of intervention.

Projects cannot undertake activities that need to be standardized across scale such as managing large resource transfers to subsidize costs of education. Kane (2004) points out that projects cannot address opportunity costs – methods to do so are expensive, and therefore not something that small projects can do. In addition, projects cannot be used to drive universal quality reforms such as improvements in teacher training at a level of scale – these are more appropriate for national bureaucracies to undertake. Projects can, however, provide important spaces for carrying out extensive consultations with communities, building enabling environments and capacities at local level, and strengthening communities' ability to hold educational providers to account.

In particular, *civil society* and *non-state actors*, including the private sector, can offer powerful demonstrations of how change may be brought about, putting in the kinds of effort required to nurture change, to experiment through sustained local presence and action, and to learn through continued action research, dialogue with diverse stakeholders, and to respond to situations as they emerge. Such intense 'glasshouse' development of lessons can be sustained at small scale, or with a committed group of actors who can work across scale, but can put equal amounts of intensity into nurturing learning processes.

National systems cannot undertake activities that cannot be standardized at some level of scale. Where they do – i.e. pilot reforms through a 'project' approach *within* the national system (such as DPEP in India), they may create inequalities within national systems in the activities, job profiles and remuneration of officials, running the risk of creating disgruntlement on the part of those officials who are not within special status 'projects'. Where reforms are necessarily piloted, they must be accompanied by clear plans of how to proceed once the results of the pilot intervention are apparent, and can offer a basis for larger systems planning.

What *states* can do is to establish a universal normative frame: (a) through law; (b) improving locally responsive delivery through structuring community participation and decentralizing aspects of provision to local levels; (c) introducing universal quality reforms, such as teacher training; (d) developing incentives systems to stimulate both demand and equitable supply; and (e) through monitoring systems, regulate diverse actors in the education system to ensure that equality goals and quality standards are being met by all.

With the emphasis on national ownership of reforms (Rao and Smyth, 2005), it is clear that *international agencies and donors* need to play a role in providing critical resources to support innovations where government resources are engaged in systemic development; and to help generate lessons of change and influence change processes where they are required, through facilitating cross-country and cross-regional learning. In many cases, donor resources have played a facilitative role to national reform initiatives (World Bank, 2004*a*, Hossain, 2004). A paper (n.d.) of the United Nations Girls' Education Initiative (UNGEI) identified the following ways in which international agencies and donors can support the acceleration of progress: (a) focus intensive interventions on selected countries; (b) adopt a proactive and intensive approach, concentrating expertise, knowledge and other resources to reaching out-of-school girls and helping them overcome barriers to quality basic education; (c) intensify advocacy at national and international levels; (d) intensify partnerships for planning, co-ordination and service delivery; and (e) focus on an inter-sectoral approach.

From a gender perspective, the need to ensure that sufficient resources are allocated to broad policy priorities is paramount. Many commitments to gender equality are not backed by a sufficient resource allocation, or an adequate understanding of where the 'spend on gender equality' needs to be located within the financial disbursement plan. Ensuring that financial allocations are gender equitable is understood in terms of both being adequate for the purposes of the general population of boys and girls, and also sufficient for targeted redistributive actions that are required to correct gender imbalances in access and participation. This requires a clearly articulated policy plan that develops the rationale supported by an analysis of required funds. Gender budgeting (see Box 13) has developed as a tool that is aimed at analysing how general expenditures affect women and men differently, allowing for an approach to general budgeting that is more gender-aware.

Box 13: Gender budgeting in Rwanda

The Rwanda Gender Budgeting Initiative (RGBI) was developed with the aim to translate the political will of the Government of Rwanda to accelerate the promotion of gender equality across its development agenda and processes into tangible actions. The objectives of the RGBI are: (a) to link public resources allocation and expending to policies; and (b) to take account of the specific constraints, options, incentives and needs of females and males in the budget process and decision-making.

The RGBI was conducted by three ministries working in partnership: the Ministry of Education with the Directorate of Planning playing a key role; the Ministry of Gender and Family Promotion; and the Ministry of Finance and Economic Planning, incorporating the budget, PRSP and statistics units.

The RGBI followed several steps that offer a useful template for other countries:

The first step was to *engender the National Education Sectoral Policy* and the Education Sector Strategic Plan. This step is fundamental to ensure that the budget follows the policy. The key policies and plans were engendered through partnership between FAWE Rwanda and the Ministries of Gender and Education.

The second step was to *develop the appropriate capacities and skills through the organization of gender analysis and budgeting training* for staff of different ministries. The training was tailored to practical application.

The third step was to *develop checklists for guidance* of the activities of the Ministry of Education.

The fourth step was to *ensure that gender issues are integrated into the justification for the budget*, which in Rwanda meant integrating gender issues into the Strategic Issue Papers (SIP) of the Ministry of Education.

The fifth step is to engender the Medium Term Expenditure Framework (MTEF) planning and training process.

The sixth step is to *undertake portfolio analysis of the Ministry of Education, identifying key programmes, and analysing the 'result chain' from a gender perspective*, which includes assessing programme objectives, resources, outputs and outcomes.

The seventh step is to *analyse the largest sub-programmes of the budget from a gender perspective* to assess the extent of gender equality in the distribution of expenditure and benefits arising. Analysis in Rwanda uncovered unequal access to study grants for female relative to male students, bias towards higher education over other levels of education, which in turn was anti-poor and pro-male; and gender stereotypes in curriculum development.

The eighth step was to *elaborate a 'gender budget matrix'* that accompanies the budget to Parliament.

Source: Diop (2004).

5.   'Scaling up': lessons and challenges

Lessons from, and for 'scaling up'

A central dimension of 'scaling up' processes is 'learning' – particularly from mistakes (World Bank, 2004*a*). Where processes of learning are instituted into the development process, interventions evolve and grow as they learn from pilot experiences and from communication with others across different regions and countries. Knowledge exchanges on achieving gender and education can yield significant insights into common experiences and ways in which these experiences can be re-channelled into policy and intervention design and process.

What have been some of the lessons learned about the difficulties encountered in 'scaling up' gender-equality initiatives? One difficulty that arises, where non-state actors (the drivers of innovation) partner with large national bureaucracies, is the different pace of national systems in their cycles of planning, execution, monitoring and evaluation when compared to the greater flexibility and responsiveness of localized initiatives. The compulsions on bureaucrats and ministers are far more complex at an aggregate national level, and external actors working in partnership with them are usually unfamiliar with the cycles of work, in particular the frequent rush to push funds or plans through at particular points of the functioning of the political system. These points could be: (a) related to the functioning of parliament; (b) to the budgetary process; or (c) to a range of political compulsions that are not planned or organized. In short, the political rhythms of policy-making are often not compatible with the style of planning that has fostered and sustained change in successful innovations on the ground. The flaws of bureaucratic systems could create compulsions that have been spared smaller projects, which usually have the luxury to work in a controlled environment. For example, Mlama (2005) cites the case of FAWE working with education ministries in several African countries, where the 'haphazard' transfer of teachers from the COE schools (discussed earlier), delays in recruitment of teachers, and their poor remuneration, constrains the effective functioning of the innovation. These wider impediments are common to education systems in many developing countries, and are likely to put early brakes on efforts to 'scale up' good practices in girls' education.

Where projects nurture excellence by instituting both pecuniary and non-pecuniary rewards and incentives, the realities of 'everyday' public sector management in the course of 'scaling up' may be an undermining factor in sustaining what was considered to be a main source of the change process in the 'success' story. Similarly, while con-

vergence between line departments at local level may be easier to develop in a smaller geographical terrain, such as a district or sub-district, at state and national levels these may be far harder to achieve. Analysing what aspects of 'scaling up' are best taken up at national or federal level, and which should be retained as a function of decentralized or local planning, is work that remains to be done in relation to 'scaling up' gender-equality initiatives.

Box 14: Critical perspectives on 'scaling up'

A knowledge exchange in South Asia highlighted several issues that are important to bear in mind when 'scaling up' girls' education. Participants were drawn from a range of governmental and non-governmental programmes that were well known for their significant impact on gender inequality in education. These interventions operate at different levels of scale, but given the population density of South Asia, were generally operational at a level where the population coverage is significant. Issues raised included the following:

'Scaling up' implies a process of 'making routine', but routine may be the death knell of innovation. Going to scale shifts the approach from one of innovation and learning to one of implementation. The assumption becomes that what succeeds has been 'learned', and now the issue is to implement it in the course of a normal routine. Strategies must become mainstream but not trivialized. 'Scaling up' often just 'upscales' the formula and sometimes the processes are forgotten.

Does 'scaling up' mean 'one size fits all'? There is a danger when talking about 'scaling up', that the concept is seen to imply the need for 'one large project' managed by government. The need for other options – such as multiple initiatives running simultaneously on the micro level that would create a macro impact – should be emphasized. They do not need to have one management system.

Who takes responsibility for 'scaling up'? Does it become a responsibility only for government? How can all stakeholders be brought into the 'scaling up' process, so that all their rights as well as mutual responsibilities are identified and supported?

Source: Commonwealth Secretariat (2005).

Government procedures and structures are, in many ways, inimical to innovation – structures built on functional hierarchies can operate against the kind of learning that is demanded in 'scaling up' from innovation and experimentation. Standardization of inputs may squeeze out the space for autonomy that is required for teachers and local change agents to carry out their work, unless spaces are created and nurtured within standardized systems, to allow for local flexibility and innovation. Many governments may commit to this in principle, but find it hard to permit in practice. Similarly, communication challenges in large systems can give rise to confusion and misleading information being transmitted across and between levels.

Lack of understanding of the principles underlying the intervention that is being 'scaled up' can become a significant obstacle when programmes are 'scaled up'. When innovative practices become small components of large programmes, there is a tendency

for project managers to communicate ineffectively (or not at all) about the underlying principles that made an innovation succeed. In the *Adhyapika Manch* (women teacher forums), an initiative that created spaces for women teachers in Rajasthan, India, to come together to discuss their own personal routes of empowerment and their experiences in their professional lives, the commitment to the space for women teachers became diluted as the programme went to scale, and both managers and women teachers resisted the forum in some areas where investment in the process of bringing women teachers together was reduced and became a routine rather than a catalytic activity (Jain, 2004).

A danger also exists with regard to the time frames in which different development institutions and agencies operate. At the level of 'ideas', the global agenda tends to change on a frequent basis, uncovering new ideas and new modes of 'doing' on a near-continuous basis. While this is exciting and allows for great debate, it is also a reflection of a global space that is not moored to local realities, and hence often occupies a more abstract world of ideas. At national level, change processes are more medium-term although they, too, are likely to change based on the whims of political realities and extraneous factors. At local level, change processes are likely to function more slowly. Hence, the time frames of different actors may not be in 'sync', leading to challenges in sustaining innovations that are being 'scaled up'. The 'next great idea' is always bigger and better: hence, new ideas can displace older ones, especially if the older initiatives have been running effectively, but quietly. In Lok Jumbish, a Government-NGO partnership in Rajasthan, the shift to *Balika Shivirs* (residential camps for girls) as a major part of the gender strategy displaced the attention paid earlier to the women teacher forums (see above). Continuous nurturing is necessary for specialized gender interventions, as the nature of change is both long-term and often 'silent'. However, policies and programmes are continuously seeking new challenges and solutions, which may result in displacing these 'silent revolutions'.

Conditions for effective 'scaling up' from projects to programmes and policies

The discussion thus far on 'scaling up' has suggested the need to maintain a distinction between 'systemic and specifically local elements' (Samoff and Sebatane, 2001, p. 6) of change processes. This means that 'rather than replicating the specific elements of the reform, what must be 'scaled up' are the conditions that permitted the initial reform to be successful and the local roots that can sustain it' (Samoff and Sebatane, 2001, p. 7). This would provide the basis for taking a country's identified list of 'what works' in its own context and ensure that the conditions for 'scaling up' practices that make a difference are put in place. Below we list some of the conditions that have been identified as important for 'scaling up'.

Increased public accountability and political will

In the face of resistances to and lack of widespread public support for girls' education, 'scaling up' is likely to encounter challenges. For 'scaling up' to happen, the capacity of the innovation and its champions to negotiate and advocate must be strengthened, so that more space is generated for the innovation within the public system, which is otherwise closed to change.

Unterhalter et al. (2004) argue for the importance of a 'publicly accountable criterion' of achievements and challenges in achieving gender equality, drawing on existing data. Operated at different levels, such public accountability is necessary for citizens to follow the progress of their states or localities in making progress on girls' education, and can help fuel demand for reform (see Box 15).

Box 15: Developing a 'scorecard' for greater public accountability

The 'Beyond Access' research and advocacy project managed by the Institute of Education, University of London, and Oxfam GB, has developed a 'scorecard' methodology which can be used at international, regional, national and subnational levels to compare progress along these dimensions in achieving gender parity and equality.

The need for a 'scorecard' arises from the lack of knowledge at different levels of education systems about the pace and quality of progress. Without comparable data, it is difficult for governments and other stakeholders to track progress in a way that enables identification of gaps and limitations in existing programmes aimed at reducing gender disparities. Although such a process is fraught with difficulties – developing indices can oversimplify what are complex processes; they tell us little about processes of change and the relationships between different drivers of change; they rely on data that is often inconsistent or unreliable – the benefits of a tracking methodology to chart progress are considerable. 'Scorecards' offer, in particular, a guide to progress, which can enable identification of positive change experiences from which lessons can be learned in areas that are lagging behind.

Rather than reproducing the limitations of data on gender parity which only use measures of enrolment that do not capture the complexities of issues relating to attendance and participation, the 'scorecard' methodology proposed includes four measures: (a) girls' net attendance rate in primary school; (b) girls' survival rate over five years in primary schooling; (c) girls' Net Enrolment Ratio (NER) in secondary school; and (d) a country's gender development index. A supplementary scoring process is suggested to map countries' policy initiatives for girls' education.

Countries were ranked according to their pursuit of purposive actions to progress girls' education. The application of the 'scorecard' methodology to the policy environments of countries was attempted for Commonwealth African and Asian countries. It showed that countries that have a 'vigorous' policy approach to gender equality rank better on gender equality in education than countries that do not.

Combining assessment of countries' achievements on gender equality with their policy environments helps to provide an instant insight into the importance of appropriate gender-equality policy initiatives in education for those countries that seek to make progress. The analysis carried out for Commonwealth countries identified four factors that make a difference for gender equality in education: (a) active presence and advocacy of women's groups and public concern about gender equality; (b) well resourced and supported public education; (c) integrated policy approaches in education, health and welfare; and (d) democratic governance and the absence of conflict.

Source: Unterhalter et al. (2004).

Motivation and continuity of personnel

Where frequent transfers are a feature of administration and management, lack of continuity can have a negative impact on 'scaling up' (Commonwealth Secretariat, 2005). The Madhya Pradesh Education Guarantee Scheme in India had a dedicated task of administrators who were assigned to the programme for a consistent period, enabling them to act effectively in nurturing the programme and ensuring that it went to scale (World Bank, 2004*a*).

An emphasis on reform of education systems for 'scaling up' must not overshadow the importance of individuals within systems who act as change sponsors. Many innovations thrive because there are committed individuals at all levels of the system managing the innovation. In bureaucratic systems, too, this is the case. In the context of 'scaling up', a system of incentives and rewards for innovation (non-monetary in particular) would help to create incentives for personnel to work towards a positive change.

Demonstration of effectiveness of the pilot model

Credibility of the innovation and its social acceptance are key components of 'scaling up'. This is an obvious point, but in particular places, emphasis on the collection of data for a baseline as well as regular reviews and impact assessment. FAWE's Demonstration Interventions (see Box 6) are an example of the effective use of pilot demonstration models as an entry-point for engagement with policy-makers. Participatory data collection also helps to build up demand and mobilize communities by allowing them voice in articulating their needs, and encouraging communities to develop a stake in the reform process required for 'scaling up'. Lack of monitoring and evaluation to demonstrate impact has been cited as a potential constraint to effective 'scaling up' in the case of the Mother's Clubs in the Gambia (UNICEF, 2004).

Data collected through participatory methods can help to counteract the effects of data generated through poorly managed monitoring systems. Samoff (1999, p. 261) warns of the dangers of databased policies where data are incomplete or inaccurate, arguing that quantification based on data cannot 'be assumed to assure the reproducibility of results or even the comparability of data over time'.

Establishing learning processes within large-scale programmes

Research needs to be a significant aspect of the 'scaling up' process. A commitment to create space for revision and analysis needs to be clearly made on the part of larger systems, and sensitive and extensive research must be encouraged to create those lessons and learning processes. This is largely overlooked in 'scaling up' processes, as the assumption is that lessons have been learned from pilots and their technical adoption into larger systems will be sufficient.

Efficient management systems

Where data is poorly managed, and there are delays in implementation, translation from project to programme may not happen easily (UNICEF, 2004). Change processes need to be underpinned by sound management systems that can translate with some ease into larger bureaucratic systems. Idiosyncratic project management structures that rest on

individual ability and motivation may not offer useful models for bureaucratic uptake, and in fact may impede 'scaling up'.

Participation of local communities
who then own and sustain the reform

Where genuine participation is a commitment, communities will be in a better position to set the terms of their engagement with state policy interests, and own and manage reform at local level. Support to leadership alongside consultative policy frameworks (Rose, 2003) can allow for genuine local ownership, with appropriate support and spaces for weaker members of communities to be represented.

Decentralization offers an important route for ensuring closeness of fit between planning on the one hand, and local realities on the other. However, the potential for decentralized planning to promote gender equality in education has been little studied, apart from a focus on training of local government officials. Most innovations, on the other hand, succeed because they engage local communities in deeper processes of change, building ownership and support from within. 'Scaling up' will risk taking away these rights to own and manage processes of change from communities, thereby losing a citizen-centred focus on education reform and change, unless efforts are made to focus on the participatory aspects of governance and management (Commonwealth Secretariat, 2005).

Creation of new institutional structures

Moving from pilot projects to wider programmes is not easy where the pilot projects were set up in the first instance to bypass institutional structures that are not conducive to promoting gender equality. Where projects create new institutional forms or mechanisms, they are likely to be more successful in bridging the vast gaps between successful local mobilization and larger-scale innovation. An example of this is the relationship between the Mahila Samakhya (MS) programme in India and the wider education programme, the DPEP (see Box 16). This example shows how women's collectives can become useful institutional forms for mobilizing demand for girls' education, and providing the kind of qualitative and long-term support required to push for and sustain gender equality.

Creating new institutional forms is necessary where the values underlying effective and innovative approaches are not embedded in larger-scale systems. For example, where children are moved from innovative project schools to formal schools, they may encounter educational processes that run counter to the dynamic, child-centred, quality-based approaches made available to them in the alternative mode. This may lead to rapid dropout. Both the targeted mechanisms, as well as the universal schooling system need to be oriented to similar values and approaches to learning, so that all children benefit (Commonwealth Secretariat, 2005). In the absence of such a guarantee bringing alternative institutional forms – particularly those that are structured to be responsive and flexible – into the mainstream, may be problematic. Concern that 'scaling up' may result in the loss of the very factors – responsiveness, flexibility – that were effective in

promoting change in a project context has been cited in several cases (UNICEF, 2004). While integration of alternative models into formal systems may be 'ideal', systemic barriers to institutional innovation may mean that allowing alternative forms to be adopted (not adapted) within the mainstream may be the best way forward.

Focus on creating consensus
on common goals and their meaning

As discussed in the previous section, 'scaling up' cannot happen in the absence of public debate on the common goals that bring different partners together. If treated as a 'technical exercise', 'scaling up' is likely to ignore or bypass the processes through which ideas operating at micro-level become the basis of shared values that are then scaled upwards within systems. For example, the key principles of quality and equality need to be identified, adopted and shared by all actors involved.

Box 16: Creating new organizations and spaces at local level

MS is a programme focused on empowering women that was set up within the Department of Education. With parallel structures operating from state down to district and village levels, MS has worked with village women to evolve new forms of collective organization, *sanghas*, which bring poor and disadvantaged women together to evolve new strategies and approaches to tackling the inequalities experienced in everyday life. In the state of Bihar, India, MS works closely with the DPEP - a large-scale programme aimed at universalizing primary education, with a particular focus on reducing caste and gender gaps in education. DPEP working at a larger scale and a broader mandate, lacks the empowerment focus of MS, which views inequalities experienced by women in a holistic perspective. DPEP on the other hand focuses on 'minimal equality', concerned with girls' access and participation in schools. While DPEP has set up the infrastructure to promote women's participation in school committees, it lacks an overall approach that can ensure that women are able to participate effectively and articulate their concerns. MS, on the other hand, through its capacity-building is able to bring out women's inherent strengths, and enable them to function effectively and collectively in public spaces. The partnership of the two programmes provides a powerful approach to promote girls' schooling through the empowerment of adult women.

Source: Unterhalter and Dutt (2001).

Statutory mechanisms

The credibility of gender equality reforms requires legal mandates that are unlikely to be overturned based on policy 'whims', and can endure changes in government. Examples include the Education 'Guarantee' in Madhya Pradesh, India which offers a state guarantee of response to demand for education facilities. Policies that confirm the right of pregnant girls and adolescent mothers to return to school in Zambia can also play a critical role in giving legitimacy to rights claims.

Active women's movements

The role of women's activism in promoting and sustaining gender-equality reforms is critical (Unterhalter et al., 2004). This is effectively illustrated by the role played by FAWE working in several African countries in close partnership with governments. Managed by professional women in different African countries, FAWE has established itself as a premier body of women educationists committed to policy reform towards gender equality in education. Ministers and senior policy-makers are active members of this network (Garrow and Kirk, 2001). FAWE works through research, advocacy, training and capacity building and provides technical advisory support to many African governments. The active presence of FAWE chapters in several countries has helped create a positive environment for change in African education, placing greater emphasis on girls' education. By providing the critical skills in gender mainstreaming that governments often lack, FAWE has helped place gender equality at the heart of education reforms in many African countries. Regional or national networks that provide sustained pressure and can also help governments develop the critical capacities required to implement gender-equality commitments can provide a powerful stimulus. The Gender in Education Network in Asia (GENIA), facilitated by the regional education office of UNESCO, plays an important convening role for gender mainstreaming. GENIA is a network of gender focal points in ministries of education across the region and supports governments by developing resources, toolkits and materials that can be used for strengthening their capacity (UNESCO, 2003*b*).

Supportive conditions for 'scaling up' at the global level

Much of the discussion on 'scaling up' has focused on the local and national levels, and the interrelationships between them. However, donors are likely to play a critical role given the increasing linkages between external resources and sector programmes in education. Below we review a few key issues relating to the role that donors and international agencies can play in supporting 'scaling up' for gender equality.

The premise behind the shift away from projects to programmes, as discussed earlier, is that there will be greater opportunities to accelerate the pace of change and yield greater progress to meet international goals and targets. 'Scaling up' is also cost-efficient, reducing the transaction and operational costs of large numbers of geographically focused projects. It is also often argued that the SWAP provides greater opportunities for gender mainstreaming (Rose and Subrahmanian, 2005). However, a recent review from three countries suggests that some of the problems associated with gender mainstreaming at national level are equally replicated in donor agencies (Sibbons et al., 2000). These include problems of policy evaporation, whereby policy statements on commitments to gender equality disappear as they move down the implementation process. A reason often cited is the concern that overt support for gender-equality policies may be seen as undermining national ownership of the policy process. The preoccupation with government partnership may also lead many donors to neglect partnerships with women's movements and organizations that then become marginalized in the consultation process. A focus limited to government agendas may therefore result in diluted atten-

tion to gender parity, rather than focusing attention on the kinds of structural change required to promote meaningful gender equality.

Pragmatism may therefore become the dominant underlying mode of engagement between donors and governments, forcing out more difficult discussions about issues of social inequality. Moser et al. (2004) consider that the shift in Malawi from programmes and projects to sector-wide approaches and direct budgetary support is likely to raise even more challenges for issues of evaporation, invisibilization and resistance. Where donor co-ordination assumes great importance, lack of widespread commitment to gender equality amongst all donors may also dilute the role of donors in supporting gender-equality reforms (ibid.). Variable commitments by donors to gender mainstreaming will greatly restrict the possibilities for a common agenda on gender mainstreaming, to be backed by the required resources and commitment to be developed and implemented.

An important method for international actors to support gender-equality reforms is through requiring disaggregated information and establishing well-designed monitoring systems and regular review systems, building systematic upward linkages between local and national education systems. The FTI has developed a series of gender-disaggregated indicators that are included in the assessment criteria for deciding whether countries are ready to be endorsed on to the FTI (Rose and Subrahmanian, 2005). These include gender-disaggregated data on enrolment, number of teachers, civil servants, Gross Enrolment Ratio (GER), net enrolment ratio, completion rate, learning achievement scores, repeaters, data for secondary school enrolment, and information on curriculum, pre- and in-service teacher training, amongst others. However, even these indicators focus largely on access and outcome indicators, and do not compel attention to issues of process, such as the nature of consultation, and the extent to which women's voices are heard and responded to in design processes.

Challenges for 'scaling up': trade-offs and political constraints in efforts to reform education sectors and to mainstream gender equality

'Scaling up' has so far been discussed primarily as a 'technical' issue requiring the right diagnosis, analysis, institutional design and partnerships, amongst others. However, a running thread in this publication has been the wider issue that surrounds any discussion on acceleration and expansion, and on reform. This is the issue of politics; while we have reflected on the importance of political will to support reform, the negative role that politics can play to constrain reform, and strategies for dealing with political constraints, should also be borne in mind.

Political dimensions of education sector reform

Much advocacy and progress in education, as in other sectors, rests on the effective deployment of arguments for commitment and investment. In education, particularly for girls' education, instrumental arguments that demonstrate the impact of girls' education for the achievement of a range of developmental goals have been important to make the case for investment. Corrales (1999, p. 3) argues that it is only when governments have begun to see education as a necessary catalyst for development that they actually take action on education reform, arguing that previously 'they treated education more as a social right or entitlement, which they provide to citizens depending on the extent of their social commitment, fiscal resources, or inclination to use the education system as a mechanism of political cooptation'. The impetus for reform, therefore, comes from external pressure-building on powerful arguments, and hence 'consensus on the link between education reform and the economic interests of nations' (Corrales, 1999, p. 3).

However, many of the requirements of 'scaling up', including greater decentralization to enable more local ownership of reform processes, are subject to political constraints. Decentralization occupies an inherently contradictory position in policy formulation whereby the logic of decentralization – better planning based on local understanding of contexts and needs, improving efficiency through bringing providers and clients closer, hence affording greater public scrutiny of the delivery of services, and redistributing decision-making power – can conflict with centralized financial allocation mechanisms, as well as 'the inherent interest of states to centralize authority' (Corrales, 1999, p. 10). Corrales suggests that the incentives for states to decentralize arise from particular situations – the need to bolster legitimacy when it is threatened, to transfer responsibilities in contexts of conflict, or when they lack information for planning – in the absence of which states may lose interest in decentralization. In particular, the civil service may strongly resist decentralization, viewing it as a reduction of their powers and authority. Political and administrative interests may therefore clash, reducing the potential for decentralization to deliver on its promise as a form of structural redistribution.

Understanding what catalyses change is important. If change is driven by a particular historically shaped set of political dynamics, then the opportunities of such dynamics as well as the costs of them need to be understood. For example, Hossain et al. (2002, p. 23) argue that in Bangladesh, the same factors that have driven the significant expansion of access to education – the nature of political competition as well as the motivations of the tiny educated elite in the country – have been responsible for the stymieing of reforms that institutionalize more inclusive education policies and systemic reform:

> Rapid expansion of the education system, has, however, come at a cost. The problems currently identified as the major failings of educational policy and practice are the consequences of the same processes and motivations of state and nation-building which produced the successful expansion. Problems of quality, including the objectives and content of the curriculum, the tendency to try to control policy and to manage school systems from the centre, and the apparent inability to con-

trol teachers are all to some degree institutionalized by the same processes which drove the rapid expansion.

Corrales (1999) identifies three sets of impediments to reform in education. First, in any process of reform, benefits may be diffused across a wide population, whilst costs are borne by a smaller group. Where costs are concentrated on a small group, adoption will be likely to be difficult as the group is likely to resist the reform. Given that in most cases reforms are likely to be aimed at some form of redistribution of educational opportunities, the main beneficiaries are likely to be too politically weak to resist – unless they already form a functioning political lobby. As Corrales points out, if they are already an organized political lobby, it is likely that they are not too dependent on the outcomes of reform, with many options outside of the public policy and delivery system. Cost-bearers on the other hand, are likely to be politically more astute or connected, and hence be in a better position to make their views and the repercussions of reform for government heard.

Second, there are fewer and less powerful policy lobbyists – or, following Corrales, policy entrepreneurs – who are willing to push the agenda on education reform and create constituencies of support where there are none. Third, and this is linked to the previous point, education reform has a long time lag within which results can be shown, compared with other reforms. Within education reforms, distinctions need to be drawn between access reforms and quality reforms; with the former being politically easier to support as the benefits and costs may be more widely shared, and where results can be demonstrated more quickly in terms of more school buildings, and even perhaps greater enrolment rates.

Finally, it is important to remember that education systems have historically been sources of political co-optation for governments, with teaching positions serving as a form of political compensation (Corrales, 1999, p. 8) or with teachers being the layer of government service with best outreach to the population at large in terms of either election campaigning or for basic data collection and interface with local communities. The political interdependence between governments and teachers is a feature of many post-colonial societies, where teachers often represented a minority of educated or literate people within society. Whilst the authority of teachers may have eroded in terms of the status of their profession, in the context of mass education and the expansion of alternative, particularly private schooling, their usefulness to political leaders and to the bureaucracy more generally, is still extant. To that extent, education delivery systems are intrinsically political in their orientation. Teachers often serve as a significant constituency within education reform, for whom any perceived costs in the process of reform is likely to result in a significant mobilization or resistance to change (see for example, Kingdon and Muzammil, 2004).

Political challenges in mainstreaming gender equality in education

A significant constraint to political action around education rests in the lack of urgency that has defined educational policies in many countries. Fiscal constraints have resulted in education reform lagging behind other sectors. The political costs of failing to reform education may thus be lower, and hence serve as a constraint to reform. A vicious cycle

is put in place whereby the low political importance attached to bringing about changes in education systems and provisioning result in the low status of education ministries vis-à-vis other ministries, notably finance, and hence the low motivations to push reforms that may have high costs in the short term for particular political constituencies. An example of this is from a study in Uttar Pradesh, where private providers in the secondary education sector were able to subvert a state policy aimed at boosting secondary schooling for girls, as a result of low parental demand for single-sex schools for girls (Jha and Subrahmanian, 2006). The reliance on 'for-profit' providers to deliver secondary schooling meant that well-intentioned state policies did not outlast pressures placed on the state by these providers, who faced initial lukewarm demand for their supply of single-sex schools.

The role of politics is critical in a context where much is known about what needs to be done to achieve goals (World Bank, 2004*a*). Girls' education has received much attention in the last few years, and there has been much gathering of knowledge about 'what works' for promoting girls' education. Attention now needs to be paid to systemic reform issues, and the politics and costs associated with achieving this reform. To promote gender equality, there is a need to focus on issues that have been difficult to address in a central way in the policy domain. As Samoff (1999) notes for Africa, while much of gender and development analysis argues for focusing on relations of power and authority in processes and institutions of development, much education-sector research does not emphasize these issues of power when discussing gender disparities. These relate also to different kinds of tensions within education – between conceptions of education that are based on economic analysis and those based on complex societal understandings; between the priorities and needs of people in aid agencies and those of people in the national and local sector bureaucracies (Samoff, 1999).

Critical capacities that can bridge the gap between the conceptual advances made by gender advocates and the institutional mindsets that characterize policy-making bureaucracies are still lacking in many countries. Odora-Hoppers (2005, p. 60) argues that women and gender specialists often lack the tactical skills required to negotiate the policy-making arena and its complex dimensions, and that appointments to head specialist gender units or sections 'rarely follow technically rigid criteria that can guarantee strong and concise delivery'. Gender specialists are likely to face a double bind: they are required to transform entire bureaucracies single-handedly, while at the same time occupying positions considered so specialist that they have no clearly defined career paths. Developing critical policy skills and capacities alongside defining clear career paths with incentives to promote both gender specialists into non-specialists, and also encourage non-specialists to acquire gender skills, need to go hand-in-hand. This is necessary to avoid the trap that Diop (2004, p. 9) identifies in Rwanda, where she notes that both line ministries and public institutions continue to consider that 'the operationalization of the promotion of gender equality is the sole duty of the Ministry of Gender and Family Promotion, despite efforts to mainstream gender across different ministries'.

Bringing large numbers of women into political and policy systems is critical for creating the 'mass' required to make a difference. However, these changes alone are

not sufficient. For many governments, visible programmes of affirmative action become both the starting-point (which they are) as well as the end-point (which they should not be) of policy initiatives aimed at gender equality. In other words, the creation of space becomes conflated with the far more complex, long-term goal of changing institutional structures and practices, when in fact it may remain a token representation of a government's commitment.

Enabling politics: lessons for gender-equality reforms

As Corrales (1999) argues, there is evidence that suggests that all politics is not always paralysing, and that there is considerable evidence of successful reform processes, where vested interests have been challenged or co-opted in a way that neutralizes their opposition. He argues that the type of reform, its pacing and its relationship to other reforms, may have a bearing on the political acceptance of change. One variable could be the type of reform in terms of the resources it makes available or removes. For example, merging access and quality reforms will disperse the benefits, and hence avoid the pitfalls of purely quality-oriented reforms that may otherwise have a very narrow concentration of costs. By expanding resources available to stakeholders under access reforms, the costs related to quality reforms could be 'politically compensated'. However, even here the costs may be considerable if the political compensation offered is seen to result in, or arise from political patronage. A second variable is the pace of reforms. Introducing incremental change may lower publicity associated with reforms – reform by 'stealth' – but equally may lose support and interest from politicians if the process is too slow. Third, is the embedding of education reform within wider and more diverse types of reform, so that education reform is seen as part of a package of broader reform. Here the danger is that depending on the nature of the wider package of reforms, individual sectoral reforms may become caught up in a cross-fire of attack on other aspects of reform packages.

Corrales (1999) also suggests transferring responsibilities for reform to ministries with low turnover rates. In the case of gender-equality reforms, however, the ministries with the explicit mandate for focusing on gender equality have low status or priority. In many countries, departments dealing with welfare issues and the needs of women and children have lower political visibility or power. Transferring responsibilities to ministries or departments that are concerned with decentralization may offer an opportunity for greater embedding of reforms on gender equality. Yet these departments have not sufficiently been the focus of gender advocacy. The low visibility of women in decentralization processes may also minimize the impact of change – it may be easier to lobby centralized ministries with centralized policy functions because of the possibly greater concentration of feminist lobbies in capital or major cities.

External forces can play a critical role in promoting change. For gender-equality reforms, this is likely to be significant. A major boost for domestic constituencies on gender equality has been the international women's movements and international conferences and processes that have given legitimacy to local struggles. Whilst that can also have costs – feminist advocates in developing countries are often characterized as being

influenced by the 'West', bringing outside ideas of society to bear on social relations within – in general, the multi-directional nature of support provided to local feminist constituencies from donors, academics and international civil society can have a significant positive effect on local struggles.

Cross-support provided by independent advisory councils can also help to overcome the problems of sustainability caused by changes in tenure of reform agents within government (Corrales, 1999). Such bodies, drawing on credible independent members of society, can champion change using a multiplicity of forums including the media and academic platforms, amongst others. The Commonwealth Secretariat developed a Gender Management System (GMS) that highlighted the need for appropriate institutional arrangements to be put in place to strengthen gender mainstreaming, including creating cross-support bodies from within particular institutional sites, such as ministries, Parliament and civil-society organizations (Kabeer, 2003). While the Commonwealth Secretariat views these as parallel spaces operating with a common goal – the mainstreaming of gender and the advocacy of gender-equality reform – experience from education reform processes demonstrates the value of independent advisory bodies that are comprised of diverse stakeholders, including politicians, civil society, intellectual leaders and opinion-makers, and technocrats, amongst others (Corrales, 1999, p. 27). While the establishment and empowerment of such an advisory body may in itself rest on political commitment and the will to put in place reform, these bodies have the potential to provide effective, sound and relatively unbiased advice, as many of the diverse positions would be debated and negotiated through the presence of multiple stakeholders.

'Bolstering the demand side' is a critical aspect in Corrales' view – this includes providing information on the rationale for, and detail of proposed reforms to stakeholders, so that they can support the reform. While information may not dent the reservations or opposition of those against reform, it may go a long way to building new allies and constituencies of support that can bolster support for the reform even if they are not directly affected by the reform. The role of elites in this process may be critical in terms of pushing for pro-poor reforms that may lack constituencies of support from within service delivery systems or direct cost-bearers of change, such as teachers (see Hossain et al. (2002) for a discussion on Bangladesh).

Similarly, inclusion of potential opponents or cost-bearers in the design of the reform process could be a strategy to ensure that their views are taken on board and their opposition neutralized through debate with supporters of reform. However, as Corrales notes, this may not be sufficient to neutralize opposition if the underlying reasons for the opposition remain at odds with the goal of reform.

6. 'Scaling up' gender equality in education: making the transition from girls' education

The urgency of achieving goals relating to girls' education and gender equality in education relates both to the centrality of education as a human right, as well as the knowledge of the multiple positive benefits associated with universalizing education. Despite much recent attention to 'what works' in making gender equality in education a realizable goal, progress has been greater in accelerating *access* to education with less attention paid to the *reform of education systems* in a way that embeds gender equality in all aspects of their functioning. Earlier in the publication, we distinguished these two dimensions of gender equality as 'girls' education' and 'gender mainstreaming'. Within gender mainstreaming, however, are a range of diverse systemic issues that need attention, which must be carefully unpacked and analysed before strategies are developed.
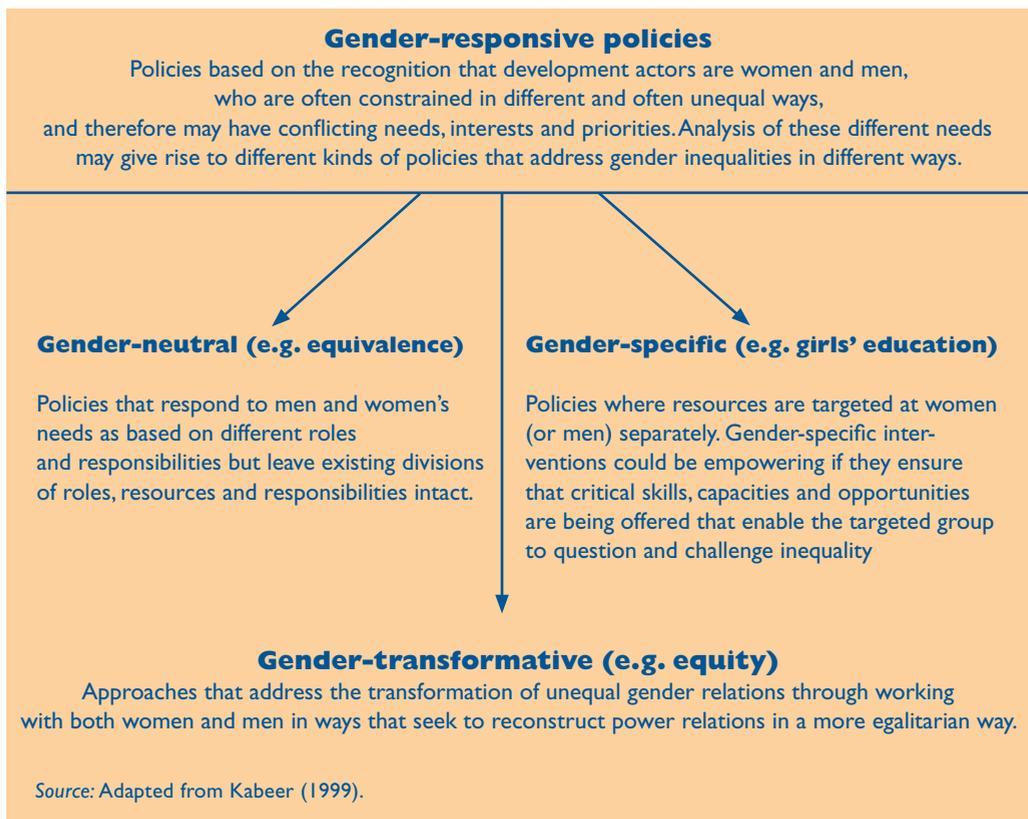
The discussions on 'scaling up' of girls' education highlight the kinds of transitions that need to be made in order to make meaningful progress towards global goals. These include: (a) transitions from approaches that encourage gender parity towards approaches that promote gender equality; (b) from small- or medium-scale projects to policy and institutional reform, linking up promising practices to wider education systems; and (c) transitions from numerous pilot initiatives that offer lessons for change to a coherent strategy that brings together different actors, pooling resources and knowledge, based on well-founded baseline data and monitoring systems to track change.

A distinction we have drawn in this publication is between gender-parity approaches and gender-equality approaches. We have said that a significant difference between the two is the level of attention paid to both *structural roots of gender inequalities* and *the transformation of traditional gender roles and stereotypes for both women and men*. This requires, first, defining desired policy outcomes clearly in terms of the vision of gender equality that is sought. Merely signing up to EFA and MDG targets does not mean that countries are clear about what the policy goals are to which they are committed. Targets need to be embedded within broader visions of the kind of change that is desired. While targets such as those for the EFA goals and MDGs are also important political statements of commitment, and therefore need to reflect a broader political and social consensus, attempts need to be made also in education sector policy and management to identify the kinds of change that are desired. The indicators that are developed to measure change can provide some insight into this underlying vision.

In this final section we identify the component parts for gender mainstreaming, aimed at promoting gender equality, based on three 'failures' identified so far:

analytical, institutional and political. Analytically, concepts of gender parity, equality and equity need to inform policy development, and also form the basis of policy analysis. This is an important first step. Second, the institutional dimensions of promoting change have been flagged as a significant gap in knowledge. Understanding educational policy and implementation systems in terms of the spaces and strategies for making them more gender-aware requires further work and knowledge development. This includes understanding the financing of specific aspects of educational policy development, through identifying what needs to be 'scaled up' (and what needs to be nurtured through local innovations), who the actors are who can play a role in this, and the kinds of resources (financial and human) that are required, are available and can be mobilized by different partners. Finally, identifying the political possibilities and barriers to promoting gender equality in education remains an element of the agenda of work to be done to take forward knowledge of 'what works' to 'how it can work' at scale.

Fig. 2: Policy approaches for gender equality in education

Gender-responsive policies
Policies based on the recognition that development actors are women and men,
who are often constrained in different and often unequal ways,
and therefore may have conflicting needs, interests and priorities. Analysis of these different needs
may give rise to different kinds of policies that address gender inequalities in different ways.

Gender-neutral (e.g. equivalence)

Policies that respond to men and women's
needs as based on different roles
and responsibilities but leave existing divisions
of roles, resources and responsibilities intact.

Gender-specific (e.g. girls' education)

Policies where resources are targeted at women
(or men) separately. Gender-specific interventions could be empowering if they ensure
that critical skills, capacities and opportunities
are being offered that enable the targeted group
to question and challenge inequality

Gender-transformative (e.g. equity)
Approaches that address the transformation of unequal gender relations through working
with both women and men in ways that seek to reconstruct power relations in a more egalitarian way.

Source: Adapted from Kabeer (1999).

A clear policy framework, which is developed on the basis of a sound conceptual understanding of the distinctions between gender parity and gender equality on the one hand, and between gender equality and gender equity on the other hand, is essential. Figure 1 shows a possible way of understanding distinctions between different kinds of gender-aware policies, following Kabeer (1999). We stress here that these distinctions are not meant to create rigid typologies, but allow for recognition of the different kinds of approaches that may develop in different contexts, based on the possible entry-points that are available. Gender-specific approaches could be those that are focused on building up women's skills and capacities to articulate their needs and interests – i.e. focused on their empowerment. Targeting women in this case could be empowering even though the focus may be on women alone. In contrast, a gender-transformative approach works with both women and men to address underlying relations of power. Such an approach may build on an earlier investment in gender-specific approaches that work directly with women (see Figure 2).

Earlier we had referred to a 'rights framework' for making explicit the outcomes to which education policy and programming should be oriented. Outcomes are usually focused on individuals, but they can also reflect the goals to which systems or programmes can be held accountable. Outcome indicators provide a significant way of assessing the impacts of programmes in this area. Drawing on a framework developed in the *EFA Global Monitoring Report* (UNESCO, 2003*a*), gender-aware outcomes need to measure equal rights to education (access), rights within education (participation and learning), and rights through education (promoting gender equality in other spheres). These rights are interrelated. As societies see increasing numbers of girls in school, the pressure for greater gender-awareness within schooling becomes more acute; equally, the more attention is paid to gender-equality policies in other areas such as employment, the greater the impact on girls entering school. Emphasizing outcomes in each of these areas can offer a positive way forward in terms of accelerating the pace of change. Suggested indicators are presented in Table 2.

However, while quantitative indicators can provide some measure of progress towards achievement of targets, it is crucial to consider the institutional processes through which these are achieved. As Diop (2004) points out, high political will means little if the institutional structures are not put in place, which can systematically translate commitment into action. Rose and Subrahmanian (2005) identify three stages of programme development at which gender mainstreaming content, processes and outcomes require assessment. These are design, implementation and monitoring.

Table 3 provides a checklist for each of the three processes that are linked to institutionalizing commitment to gender equality in planning and implementation processes. It must be recognized here that the kinds of questions that are posed are related to an assumption that there is some 'logic' to planning processes in large governments, which may not be the case in reality. Posing these questions in the absence of well-developed planning and implementation sequences may therefore be a rhetorical exercise. These questions need to be adapted to suit the implicit planning models in a given context, if the explicit models are either absent or unrealistic.

Table 2:
Measuring equal outcomes in education: some indicators

Equal access to education	Rights within education*	Rights through education
Gender-disaggregated: enrolment rates survival rates completion rates regularity of attendance repetition rates the average years of schooling attained the transition between levels of education	Subject choice by gender Learning outcomes by gender (performance in examinations) Gender-awareness in curriculum content *Teacher-learner ratio* *Gender balance within the classroom* *Qualifications of teachers* *Level of training of teachers* *Other factors shaping participation and performance by gender including:* *Health of students* *Nutritional status* *Child's involvement in family work* *Social discrimination within the classroom/society (context-specific indicators would be necessary)*	Male/female employment across different levels of education by gender Gender differentials in wages across different levels of employment/education Gender differentials in the teaching profession – recruit-ment, wages, positions reached Political participation by males/females
Number of teachers, and proportion of female to male teachers.		

* Italicized indicators refer to those that are measurable, but not treated as conventional indicators. This is by no means an exhaustive list, just an indicative one.

Source: Subrahmanian (2005). See also Rose and Subrahmanian (2005).

Table 3:
Checklist for operationalizing gender equality

Design	*Implementation*	*Monitoring*
Has gender analysis been carried out in assessment of demand-side constraints, direct and indirect costs, cultural constraints, and in-school factors?	Is there an implementation plan for the educational policy?	What is the main source for monitoring (PRSP, government sector plan)?
Do the framed objectives address the specific constraints identified for girls and boys? Is this based on sound research?	Is gender reflected clearly in the implementation plan at all levels of implementation?	What gender-disaggregated indicators are available from these sources? To what extent do they include process (e.g. not easily quantifiable) indicators?
Is there a budget clearly specified to address the achievement of objectives?	Are all relevant staff fully aware of the policy vision and objectives, and of the rationale for design of delivery?	What are the processes used in monitoring? Review missions? Regular reporting? How frequently do these take place?
Are outcomes of the policy clearly defined and do they indicate the gender issues for each outcome?	Do all relevant staff have the requisite skills and capacities to carry out gender analysis in relation to their specific management functions?	Who is responsible for developing indicators, and monitoring progress? Do they have sufficient skills and capacities relating to the development and measurement of indicators?
Is gender clearly reflected in all the indicators that are used?	Are there sufficient oversight mechanisms that are clearly specified which entail supervision of gender-equality related activities, supplemented with clearly detailed remedial processes?	
Do all relevant plan documents share a common vision, commitment to outcomes and objectives?		

Source: Adapted from Rose and Subrahmanian (2005).

Common problems in institutionalizing gender equality policies are identified by Moser et al. (2004) to include the following:

- *Evaporation:* 'When good policy intentions fail to be followed through in practice'.
- *Invisibilization:* 'When monitoring and evaluation procedures fail to document what is occurring 'on the ground'.'
- *Resistance:* 'When effective mechanisms block gender mainstreaming, with opposition essentially being 'political' and based on gender power relations, rather than on 'technocratic' procedural constraints'.

Baseline checklists that can identify pre-requisites for gender-aware schooling that can be monitored are therefore necessary to ensure that evaporation and invisibilization do not occur. Rose and Subrahmanian (2005) suggest the following items as part of a checklist for the collection of data:

- Location of schools and average distance from habitations in school catchment area.
- Number of classrooms in schools per grade, size and quality of construction.
- Availability of water and sanitation facilities – number and quality.
- Number of teachers per grade, teacher-student ratio; gender/ethnic balance.
- Fees charged – direct and indirect.
- Transportation available within catchment area if the school is further away than a reasonable walking distance; quality of lighting on roads, security.
- Extent of community participation – functioning school committees, regular records kept, participation of women.
- Security of school area, ease with which outsiders can approach students, presence of teachers throughout schooling hours, awareness of teachers on issues of safety and security of learners, particularly girls.
- Training of teachers on child-friendly schooling environments, redress mechanisms for parents including grievance procedures.
- Recruitment and conditions of work for female teachers, teachers working in remote habitations or in conflict areas.
- Gender-aware curriculum; focus on curriculum reform, training of teachers on issues of gender in curriculum transaction.
- Opportunities for post-primary education – availability of secondary schools, costs, distance, policies to encourage girls' attendance, focus on adolescent girls and social norms shaping post-puberty options for girls.

Finally, our analysis of the political constraints and motivators for policy change suggests that there is a need for attention to be paid to the 'scaffolding of support' that is in place to help motivate and sustain change. This requires analysis of the probable winners and losers of any policy change that is introduced to advance gender-equality goals; and investment in the skills, capacities and knowledge of potential change agents who are likely to support the reform and also influence opinions. Without change, catalysts working throughout the system as well as at the highest level of policy design, evaporation of policy commitment is likely to take place. Political champions are nec-

essary, and they need to be in position at the very outset of the process of designing reform.

The publication concludes with the observation of four areas where further work is urgently needed. First, there is a need for detailed work on gender-equality initiatives, investigating how they may be 'scaled up', and the kinds of institutional support required to ensure that the *institutional* lessons of 'what works' are more accurately understood, as relevant to diverse planning and policy contexts. In particular, these assessments need to be made *independently*; that is, they need to be carried out by teams of researchers that are not only constituted by people associated with the interventions, to avoid the risk of selective reporting of lessons. Second, there is the need to identify what initiatives need to be 'scaled up' and how, who the responsible authorities would be, and what kind of institutional support is needed for these initiatives to thrive. This will depend on whether the locus of implementation is at district level or at national level. A third information need is the development of realistic cost models based on an analysis of the appropriate level, and agents for the implementation of the 'scaled up' activity, based on assessing all possible contributors to the process. Not all gender-equality initiatives will cost the same. Finally, without a discussion of how to improve implementation structures, mechanisms and procedures, there will continue to be an imbalance between the development of ambitious and progressive policies and their translation into meaningful change on the ground. This is the largest gap evident in the literature on good practices and 'scaling up'. Without technically and empirically based rigorous analysis to inform change and reform, discussions of 'scaling up' will continue to be abstract rather than real.

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