EDUCATION

INVESTMENTS

IN MIDDLE EAST, EASTERN AND SOUTHERN AFRICA REGION: GAPS & OPPORTUNITIES TOWARDS SUSTAINABLE FINANCING BEYOND GPE COMMITMENTS

PLAN INTERNATIONAL

CePIS Africa Centre for People Institutions and Society

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CCE:	Climate Change Education
CSOs:	Civil Society Organizations
ECDE:	Early Childhood Development Education
FPE:	Free Primary Education
GDP:	Gross Domestic Product
GEP:	Global Partnership for Education
IDPs:	Internally Displaced Persons
MDAs:	Ministries, Departments and Agencies
MEESA:	Middle East, Eastern and Southern Africa
ODA:	Official Development Assistance
PTR:	Pupil-Teacher Rate
PWDs:	Persons with Disabilities
SADC:	Southern Africa Development Community
SDG:	Sustainable Development Goals
SNE:	Special Needs Education
SP:	Strategic Plans
STEM:	Science, Technology, Engineering and Mathematics
TVET:	Technical and Vocational Education and Training
UN:	United Nations
UNICEF:	United Nations Children's Fund
USE:	Universal Secondary Education

FOREWORD

Roger Yates

The recent school closures and lockdowns have forced children, especially girls around the world from the classroom - and millions may never return.

The most marginalised and underserved - children with disabilities, minority populations, low-income families and girls - have been pushed further to the margins.

COVID-19 laid bare existing inequalities within the education system that we can no longer afford to ignore. Without quality education, the next generation faces the threats of child labour, poor health, early marriage and intergenerational poverty. Drastic action is needed.

Determining how to make every cent of education funding work for girls is more important than ever. I am pleased that this report and policy documents provide important recommendations for the different actors supporting better financing for gender equality in education.

Currently, the recent G7 and GPE financial commitments do not go far enough to meet the ambitious targets and address the massive financing gap facing the education sector.

The unprecedented disruption to education is an opportunity to change the status quo and introduce new, gender-responsive measures to transform our education systems.

Ensuring every girl can go to school depends on governments' ability to provide stimulus spending at scale to reenroll girls, provide them with remedial learning support and increase overall investment in education. If leaders act with the urgency and ambition that the crisis demands, they can help millions of girls and lay the foundations for a gender-just recovery from the pandemic.

This change will require sufficient technical capacity at all levels, sufficient gender-disaggregated data, and because it needs the involvement of a number of government departments, sufficient political will.
We have clear and urgent opportunity to build back equal. This report calls for bold actions from brave leaders;

1. Build strong, well-performing systems by investing in what works and rooting out corruption and waste,
2. Support innovation in how education is delivered while better supporting the teaching profession, and embracing technology,
3. Prioritise inclusion, to make sure that the most marginalized especially girls, poorest, youngest and children with disabilities, receive a quality education.
4. Mobilise sufficient finance through domestic finance and increasing international support, including innovative finance.

We must continue to use our collective power of the partnership and development diplomacy to bring partners together to catalyze change and mobilize greater investments.

Roger Yates
Executive Director, MEESA

ACKNOWLEDGEMENTS

The process of conducting this study for Plan International's Middle East, Eastern and Southern Africa (MEESA) Regional Hub involved an elaborate consultative process with various stakeholders.

We would like to commend all the respective stakeholders who participated effectively in the process for their valuable effort and contribution towards making this assessment possible. We specially would like to thank the - Kenya, Uganda, Zambia, Malawi, Zimbabwe, South Sudan, Tanzania, Egypt, Somalia and Rwanda Plan International Country Office teams for their participation and organizing of multi-stakeholders who took part in the study. We would also like to thank the MEESA Regional Hub Influencing and procurement teams, and Global Hub - Inclusive Quality Education Education team who were valuable in providing input on the processes that has yielded this product.

Special gratitude is rendered to the government representatives and aid actors that took part in the study and helped facilitate meetings in the country offices. We are grateful to the young people, especially the adolescent girls and young women for their valuable contribution on this study and for adding their critical voice to the discussions. Except as acknowledged by the references in this paper to other individuals, organisations, authors and publication. The report was compiled by African Centre for People Institutions and Society (ACEPIS) as a reflection of findings during the assignment.

SECTION ONE: INTRODUCTION

1.1 BACKGROUND & PURPOSE OF THE STUDY

Plan International strives to advance children's rights and equality for girls all over the world. It works alongside children, young people and partners to tackle the root causes of challenges facing girls and all vulnerable children. In the Middle East, Eastern and Southern Africa (MEESA) region, Plan International operates in 15 countries, working with communities and partners across multiple sectors including Education, Child Protection, Skills and Opportunities for Youth Employment and Entrepreneurship (SOYEE), Sexual and Reproductive Health Rights (SRHR) among others in responding to disasters and humanitarian crises across the region. This is complemented by influencing positive changes for children and young women that are focused on girls and young women in crises, ending child marriage and related harmful practices and promoting girls and youth activism and leadership for change.

Plan International commissioned this study to assess the extent to which Education Sector budgets are adequate, gender-responsive and inclusive and to analyse education budget trends between 2019 and 2021. The study aimed to generate concrete evidence regarding trends in education sector budget allocations and expenditure to support advocacy for adequate expenditure on quality, inclusive and gender-responsive public education service provision and achievement of SDG 4. Furthermore, due to the recent pandemic, the study aimed to examine the implications of COVID-19 on education sector spending. Specifically, the study sought to: (i) analyse allocations (and expenditure) to the education sector with a particular focus on initiatives aimed at supporting the provision of gender-responsive and disability-inclusive education in line with the country policies; (ii) assess the efficiency of resource allocation and use against planned expenditure; and (ii) recommend effective strategies for CSOs and citizens to advocate for education budget increase to or above 20% of the national budget and 6% of GDP.

1.2 METHODOLOGY

How we did it – Approaches to the study:

The research employed a multi-pronged approach that included: i) Budget tracking and analysis, ii) Policy analysis, and iii) Political Economy Analysis. **Budget tracking and analysis explored** trends in allocations and expenditure to the education sector across the three (3) financial years using official budget data from National Treasuries, with a particular focus on allocations and provisions for gender-responsive, disability-inclusive and climate change education. Budget documents analysed included: budget reports, budget speeches, statements as well as citizens' budgets. The budget tracking and analysis focused on core funding to the education sector through respective Ministries of Education. This approach to the analysis was informed by the fact that across the region, the Ministry of Education is the primary institution in charge of overseeing implementation of education sector programmes. Thus, this allows for regional comparison, and within each country, for ministerial comparisons. The study, however, concedes that there exist supplementary allocations to programmes across different ministries and departments outside the Ministry of Education that have components of education and learning. However, these form a small share of funding to education and often vary year-on-year across countries.

Policy analysis involved interrogation of existing policy documents touching on the education sector and the extent to which the policies factor in gender, disability inclusion and climate change education. **Political Economy Analysis** endeavoured to interrogate the implications of interests, institutions and politics on resource allocation trends and determination of the education budget. Table 2 illustrates the budget and policy documents consulted across all 10 countries.

Who we Consulted – Data Sources and Methods of collection

The study focused in 10 countries in the MEESA region - Kenya, Uganda, Zambia, Malawi, Zimbabwe, South Sudan, Tanzania, Egypt, Somalia and Rwanda. It consulted a mix of existing and new data sources. Purposive and convenience sampling techniques were utilised to identify respondents and literature/data consulted. This involved selecting respondents based on their mandates, expertise and involvement in the education sector. Using this criterion, the study consulted **19 respondents** and **259 pieces of literature** (policies, budget documents, strategic plans, sector reviews, and reports) across the 10 countries. Tables 1 and 2 below illustrate the distribution of respondents and literature/data consulted. The study adopted a mixed-method approach to collecting data that included; i) Desk review which entailed a consultation of existing education policy and budget documents and ii) Electronic Key Informant Interviews conducted virtually via Zoom and entailed one2one conversations with selected respondents.

Table 1: Respondents consulted during the study

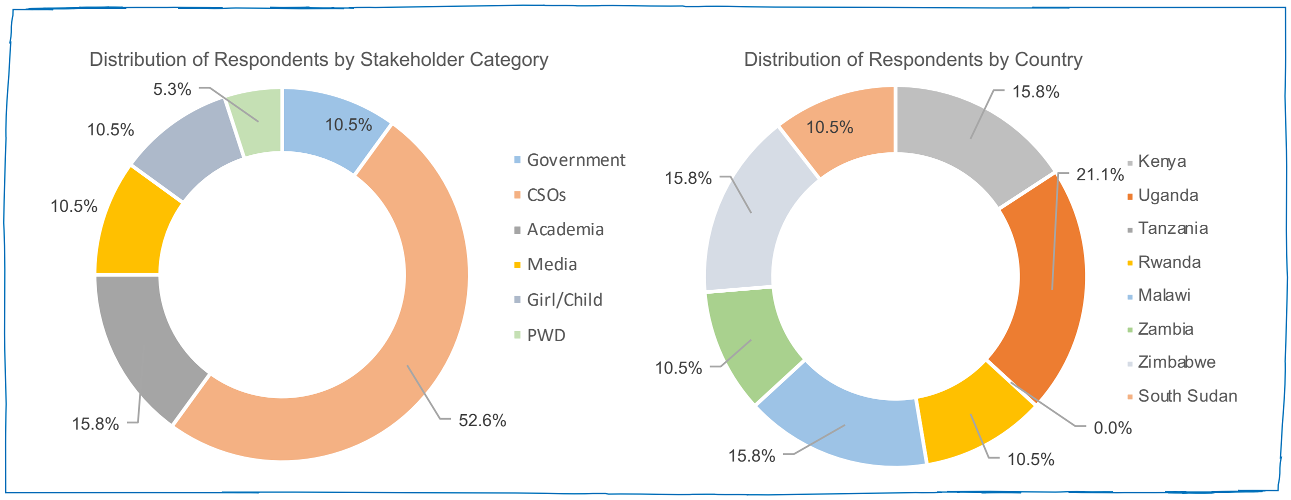


Table 2: Policy and Budget documents consulted during the study

	POLICIES	STRATEGIC PLANS	SECTOR REPORTS	BUDGET DOCUMENTS	OTHERS (REPORTS AND PAPERS)	TOTAL
Kenya	12	2	2	6	1	23
Uganda	8	4	1	7	5	25
Tanzania	13	7	4	9	0	33
Rwanda	12	5	1	10	5	33
Malawi	12	6	1	12	4	35
Zambia	12	2	0	9	11	34
Zimbabwe	15	4	1	6	0	26
South Sudan	5	2	1	13	3	24
Egypt	4	2	0	2	0	8
Somalia	6	5	0	6	1	18
Total	99	39	11	80	30	259

Analysis and presentation of Study findings

For quantitative data, the study utilised Ms. Excel to explore and highlight trends and patterns emerging from education spending in the 10 countries over the three years it focused on. For uniformity and cross-country comparison, figures in local currencies were converted to USD using current conversion rates prior to the analysis. Findings of the analysis are presented in charts and graphs accompanied by a descriptive analysis that further describes the trends and patterns drawn from the analyses. The analysis of qualitative data employed manual content analysis where audios recorded from the interviews were used to develop text transcripts. These transcripts formed the core portfolio of the study data and were analysed through thematic/content analysis guided by study objectives/questions and presented in the form of descriptive texts and text excerpts.

1.3 LIMITATIONS OF THE STUDY

Whilst many countries in the region have robust Access to Information laws and policies, there remain significant information asymmetries between government (MDAs) and citizens and other non-state actors. This is in terms of publication and accessibility of such information considered public information like budget books, policy documents, sector reports and reviews among others. This study encountered substantive challenges in terms of access to budget books that impacted rigour and findings. The most significant limitation was the unavailability of comprehensive and complete budget data. Government bureaucracy around access to official documents presented a major challenge in obtaining budget documents. Further, accessing government officials to participate in the study was also a challenge. Nonetheless, through informal networks and backchannels, a great deal of budget data was obtained for at least six countries and key informant interviews were conducted across at least eight countries. As such, bearing the challenges, the study obtained substantive information that allowed good analysis and findings that address the key questions/objectives of the study. This limitation emerges as a critical issue, reflected in the conclusions and recommendations that Plan International and partners need to tackle to promote effective advocacy for adequate financing of inclusive and just education in the region.

SECTION TWO
REGIONAL (MEESA) ECONOMIC OUTLOOK

2.0 REGIONAL (MEESA) ECONOMIC OUTLOOK

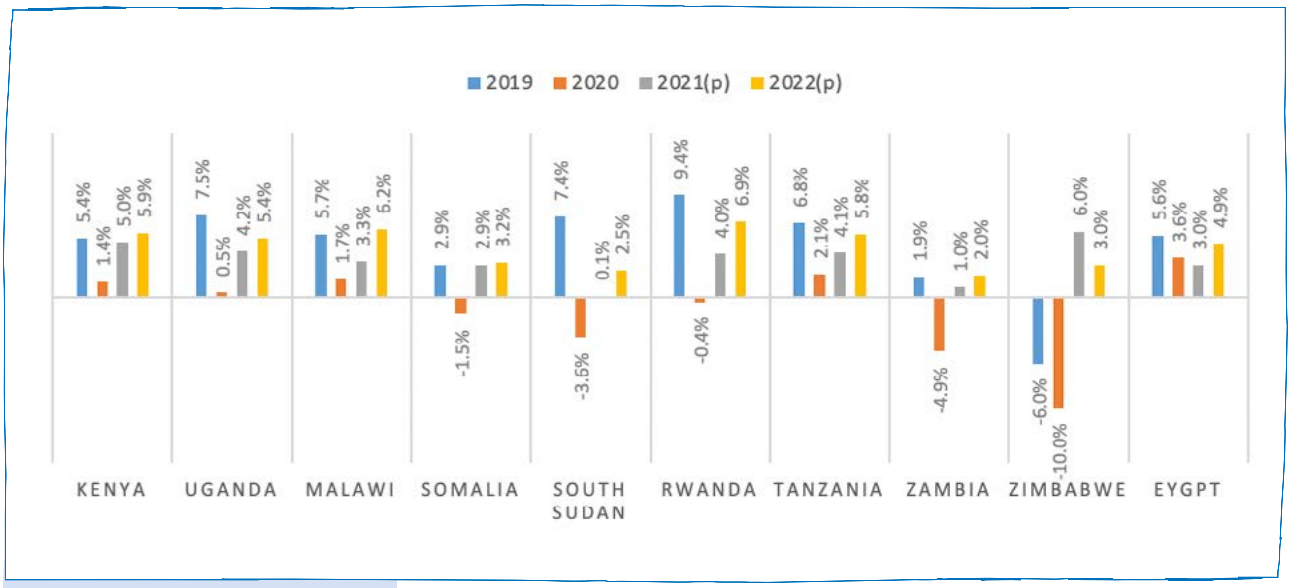
Before the COVID-19 pandemic, economies in the Middle East, Eastern and Southern Africa (MEESA) region experienced favourable economic conditions recording an average growth rate of 4.7% in 2019.[1] The growth rate was notably higher compared to the continental growth rate of 3.2% and West Africa's average of 3.6%.[2] Countries in the East African Community recorded the highest growth rates, which were mostly propelled by growth rates in the tourism sector for Rwanda and Uganda, agricultural sectors, and manufacturing sector for Kenya and Tanzania respectively. The onset of the pandemic, which led to global lockdowns, drastically affected the economies, with an average contraction of 1.1% in 2020 as each of the countries introduced different containment measures to curb the spread of the virus. Commodity-driven economies were the hardest hit due to the fluctuations in prices that fell with the pandemic-related global lockdown. Zimbabwe was hardest hit with a contraction of 10% and Zambia with a contraction of 4.9% due to a decline in copper export revenues. In Zimbabwe, the situation was further exacerbated by continued drought.[3] South Sudan, whose oil sector accounts for 70% of the country's GDP also contracted by 3.6% due to a global decline in oil prices. With the ease and relaxation of the COVID-19 containment measures, the different economies are expected to rebound with average projected growth rates of 3.2% in 2021 and 4.5% in 2022. Figure 1 below highlights growth and projected growth in the MEESA region.

1 Africa Development Bank, African Economic Outlook 2021, https://www.afdb.org/en/documents/african-economic-outlook-2021

2 Africa Development Bank, 2020. West Africa Economic Outlook 2020 - Coping with the COVID-19 Pandemic https://www.afdb.org/en/documents/west-africa-economic-outlook-2020-coping-covid-19-pandemic

3 Africa Development Bank, Zimbabwe Economic Outlook https://www.afdb.org/en/countries/southern-africa/zimbabwe/zimbabwe-economic-outlook#:~:text=The%20onset%20of%20the%20COVID,rate%20of%20838%25%20in%20July.

Figure 1: MEESA Region GDP growth rates



Source: Africa Development Bank

Beyond the regional analysis, each country has had a different macroeconomic performance over the past years and is being impacted and responding differently to the adverse effects of the COVID-19 pandemic, a brief assessment for each country is provided below.

KENYA

Kenya's economy was adversely affected by the COVID-19 pandemic, contracting by 0.3% in 2020 compared to a revised growth of 5.0% in 2019.[4] Despite growth decline in 2020, the economy has been resilient in post-pandemic recovery, with real gross domestic product (GDP) increasing by 5.3% in the first half of 2021, following rebounds in the industry and services sector after relaxation of the COVID-19 containment measures. Steady growth rates are anticipated with real GDP projected at 4.9% per year on average over the years 2022–23.

UGANDA

Marked by a relatively balanced fiscal policy environment and substantial economic growth as a result of a reliable agricultural sector, Uganda's economy recorded GDP growth rates of 6.9% in 2019[5]. Despite this, growth declined in 2020, to 0.5%[6] due to the spillover effects from the disruptions caused by the COVID-19 pandemic. Regardless, Uganda's economic activity gradually increased during the last quarter of 2021, hence projected GDP growth rates averaging 5.8% in 2022[7], driven by easing restrictions, debt restructuring, and ongoing vaccinations.

4 Kenya National Bureau of Statistics: Economic Survey (2021) https://www.knbs.or.ke/wp-content/uploads/2021/09/Economic-Survey-2021.pdf
5 The World Bank in Uganda: Economic Overview. Available at: https://www.worldbank.org/en/country/uganda/overview#1
6 Africa Development Bank, (2021)). Uganda's Economic Outlook 2021. AfDB. https://www.afdb.org/en/countries/east-africa/uganda
7 African Development Bank, (2021)): Uganda's Economic Outlook. AfDB. https://www.afdb.org/en/countries/east-africa/uganda

MALAWI

Dominated by a largely agro-based economy, Malawi recorded a growth rate of 5.7% in 2019, but declined to 1.7% in 2020[8]. Reasons for this were attributed to climate-related shocks like the 2019 Cyclone Idai and the outbreak of COVID-19 pandemic. These caused low economic output in key GDP contributing areas such as agriculture, manufacturing, mining and tourism. Further, fluctuations in global demands for tobacco and other agricultural exports and a weak inflow of foreign direct investment caused a slowdown in the economy. However, a rebound-post COVID economic recovery is noted with real GDP growth projected to rise to 6.2% in 2022[9].

SOMALIA

Despite several years of political turmoil, Somalia's economy grew by 2.9% in 2019 before contracting by 1.5% in 2020[10] due to the various containment measures necessitated by the COVID-19 pandemic. The pandemic-related global recession further caused a reduction in federal & state revenue collection and foreign direct investment. Regardless, investing in social protection measures and significant increases in external grants led to apt mitigation of the adverse pandemic-related effects. In line with this, growth rates are projected to be 3.2% in 2022[11].

SOUTH SUDAN

South Sudan, whose economy is heavily reliant on the oil sector, recorded a drastic decline in GDP growth rate contracting by 3.6% in 2020 from 9.5% in FY 2019/20 attributed to the collapse of global oil prices.[12] The decline led to a 40% decrease in government revenue, which in turn increased the country's fiscal deficit to 4.9% from 2.5% in the FY 2019/20[13]. Restriction measures to contain the spread of COVID-19 also disrupted progress in the industries and services sector. Nonetheless, South Sudan's economy is expected to grow by 2.5% in 2022.[14]

8 African Development Bank, (2021): Economic Outlook of Malawi. AfDB). https://www.afdb.org/en/countries/southern-africa/malawi/malawi-economic-outlook

9 African Development Bank, (2021): Economic Outlook of Malawi. AfDB). https://www.afdb.org/en/countries/southern-africa/malawi/malawi-economic-outlook

10 African Development Bank, (2021): Economic Outlook on Somalia. AfDB. https://www.afdb.org/en/countries-east-africa-somalia/somalia-economic-outlook

11 African Development Bank (2021): Economic Outlook on Somalia. AfDB.: https://www.afdb.org/en/countries-east-africa-somalia/somalia-economic-outlook

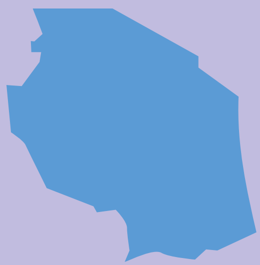
12 African Development Bank (2021), South Sudan Economic Outlook: Recent Macroeconomic and financial developments.AfDB. https://www.afdb.org/en/countries/east-africa/sudan/sudan-economic-outlook

13 African Development Bank (2021), South Sudan Economic Outlook: Recent Macroeconomic and financial developments. AfDB,: https://www.afdb.org/en/countries/east-africa/sudan/sudan-economic-outlook

14 African Development Bank (2021), South Sudan Economic Outlook: Recent Macroeconomic and financial developments. AfDB: https://www.afdb.org/en/countries/east-africa/sudan/sudan-economic-outlook

RWANDA

Rwanda's economy has seen stable growth over the past decade averaging 7.2%, and as high as 9.4% in 2019[15]. However, the Covid-19 pandemic curtailed economic activities and caused a slowdown in economic growth – registering contracted growth of 0.4% in 2020. Key sectors such as tourism, transportation, and trade that contribute to the country's economy and national development were affected by disruptions in regional and domestic supply chains.[16] Following the relaxation of domestic and regional pandemic measures, the re-opening of borders, and the implementation of the African Continental Free Trade Area, economic growth is projected to rebound by 6.9% in 2022.



TANZANIA

Tanzania's economy recorded economic growth of 6.8% in 2019 but the negative implications of COVID-19 to the economy resulted in a growth decline of 2.1% in 2020[17]. The construction and manufacturing industries, which greatly contribute to the country's GDP were greatly hit following domestic lockdown measures that were necessitated by the COVID-19 pandemic. Nonetheless, the economy is projected to grow by 4.1% in 2021 and 5.8% in 2022[18] with the government's fiscal consolidation efforts together with post-pandemic economic recovery measures projected to contribute to improved economic performance, especially in the tourism, trade and industry sectors.

ZAMBIA

Zambia's economy, whose growth averaged about 7.6% between 2004 to 2014 due to increased copper prices (one of its major export commodities), has declined in the recent past due to a decline in copper export revenues. The decline in growth has also been attributed to a decline in hydroelectric power generation and overall agricultural output[19]. During the pandemic year, GDP rates contracted by about 4.8%[20], due to COVID- 19 related disruptions in supply chains in all industries, including mining industries. Regardless, the relaxation of the lockdown measures has contributed to economic recovery within the country, with GDP growth predicted at 1.8% in 2021[21]. However, the high public debt portfolio continues to limit fiscal space and economic growth. Zambia's debt-GDP ratio rose to 104% in 2020.[22]

15 African Development Bank (2021): Rwanda's Economic Outlook. AfDB. https://www.afdb.org/en/countries/east-africa/rwanda/rwanda-economic-outlook

16 African Development Bank (2021: Rwanda's Economic Outlook. AfDB. https://www.afdb.org/en/countries/east-africa/rwanda/rwanda-economic-outlook

17 The African Development Bank (2021): Tanzania Economic Outlook 1. AfDB https://www.afdb.org/en/countries-east-africa-tanzania/tanzania-economic-outlook

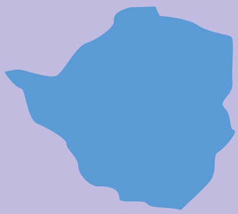
18 The African Development Bank (2021): Tanzania Economic Outlook. AfDB. t: https://www.afdb.org/en/countries-east-africa-tanzania/tanzania-economic-outlook

19 The World Bank in Zambia: Overview of Zambia's Economy between 2000 and the future. Available at: https://www.worldbank.org/en/country/zambia/overview#1

20 African Development Bank Group: Zambia's Economic Outlook between 2020 and the future. AfDB, : https://www.afdb.org/en/countries-southern-africa-zambia/zambia-economic-outlook#:~:text=The%20economy%20of%20Zambia%20fell,of%20the%20COVID%E2%80%9319%20pandemic.&text=Manufacturing%20output%20fell%20s-harply%20as,the%20spread%20of%20COVID%E2%80%9319.

21 The World Bank in Zambia: Overview of Zambia's Economy between 2000 and the future.

22 Zambia Economic Outlook https://www.afdb.org/en/countries-southern-africa-zambia/zambia-economic-outlook



ZIMBABWE

Zimbabwe's economy contracted by 6.0% in 2019 following economic instability caused by the elimination of subsidies on key commodity prices, such as fuel, and the general suppression of foreign exchange earnings. [23] Domestic lockdown measures necessitated by the COVID – 19 pandemic further slowed down activities in the economy, which was already in recession. This resulted in a contraction in real GDP growth rates by 10% in 2020[24]. Key sectors such as mining and the industrial sector, which contribute to the country's economic development continue to deal with interruptions in electrical service disrupting output, low competition, and much lower commodity prices. Nonetheless, modest economic recovery is expected in 2021 and 2022, with real GDP expected to rebound to 6% and 3% respectively[25].

EGYPT

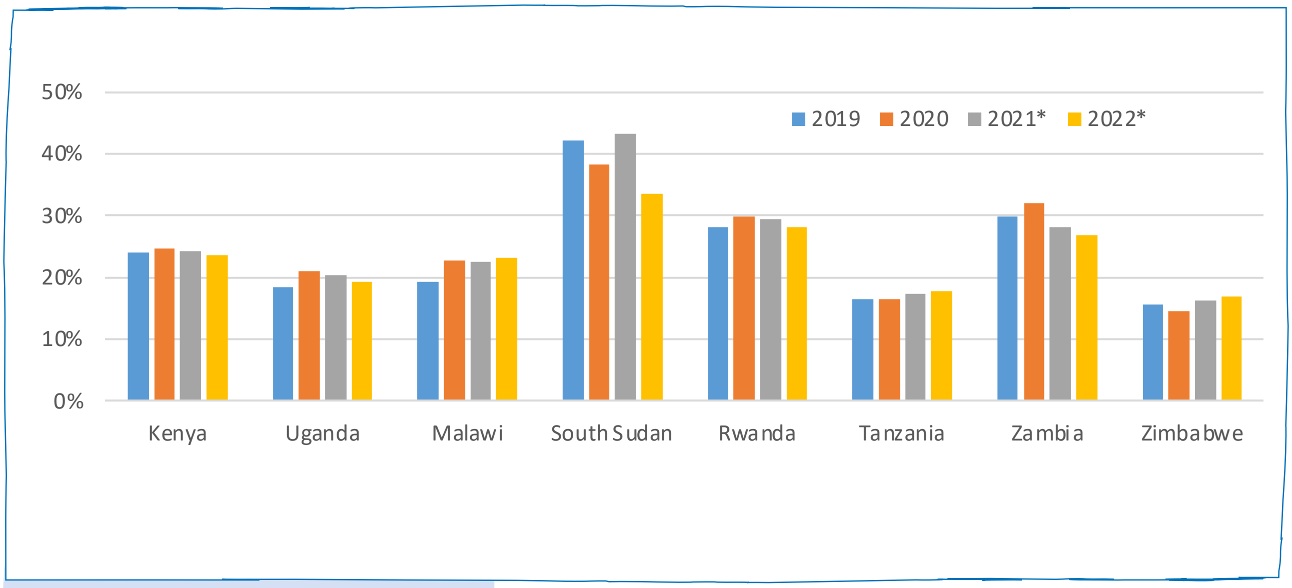
Following several macroeconomic reforms since 2016, Egypt's economy has shown resilience over the last few years. The macroeconomic response further contributed to stabilization in the economy and the ability of the government to counter the effects of the COVID-19 shock. Despite the adverse impacts of the pandemic, Egypt recorded positive growth rates of 3.6% in 2020[26] and is expected to grow by 4.9% in 2022. [27] To avoid going into a recession in 2020, the government of Egypt diverted its focus to fiscal consolidation reforms, creating a fiscal buffer enabling the country to bounce back from any inflation, slowed down economic activity, and any other pandemic-related backlashes.

23 African Development Bank (2021): Economic Outlook of Zimbabwe AfDB.: https://www.afdb.org/en/countries/southern-africa/zimbabwe/zimbabwe-economic-outlook
24 African Development Bank (2021): Economic Outlook of Zimbabwe AfDB. https://www.afdb.org/en/countries/southern-africa/zimbabwe/zimbabwe-economic-outlook
25 African Development Bank (2021): Economic Outlook of Zimbabwe 2021. AfDB.t: https://www.afdb.org/en/countries/southern-africa/zimbabwe/zimbabwe-economic-outlook
26 Africa Development Bank (2021): Economic Outlook of Egypt. AfDB: https://www.afdb.org/en/countries/north-africa/egypt/egypt-economic-outlook
27 Africa Development Bank (AfDB) https://www.afdb.org/en/countries/north-africa/egypt/egypt-economic-outlook

2.0 PUBLIC EXPENDITURE OVERVIEW

Public Expenditure entails the spending by governments on the provision of goods and services to the citizens. This also includes the provision of financial resources for the education sector. Countries in the MEESA region have different expenditures owing to the difference in various factors such as government revenues and the economic output. The expenditure for the states has been rising over the years with a significant increase noted in 2020 due to increased spending by governments as a response to the economic impacts of the Covid-19 Pandemic.[28] Figure 2 below highlights the public expenditure trends in the region.

Figure 2: Public Expenditure of Selected African State



Source: Acepis computations based on IMF

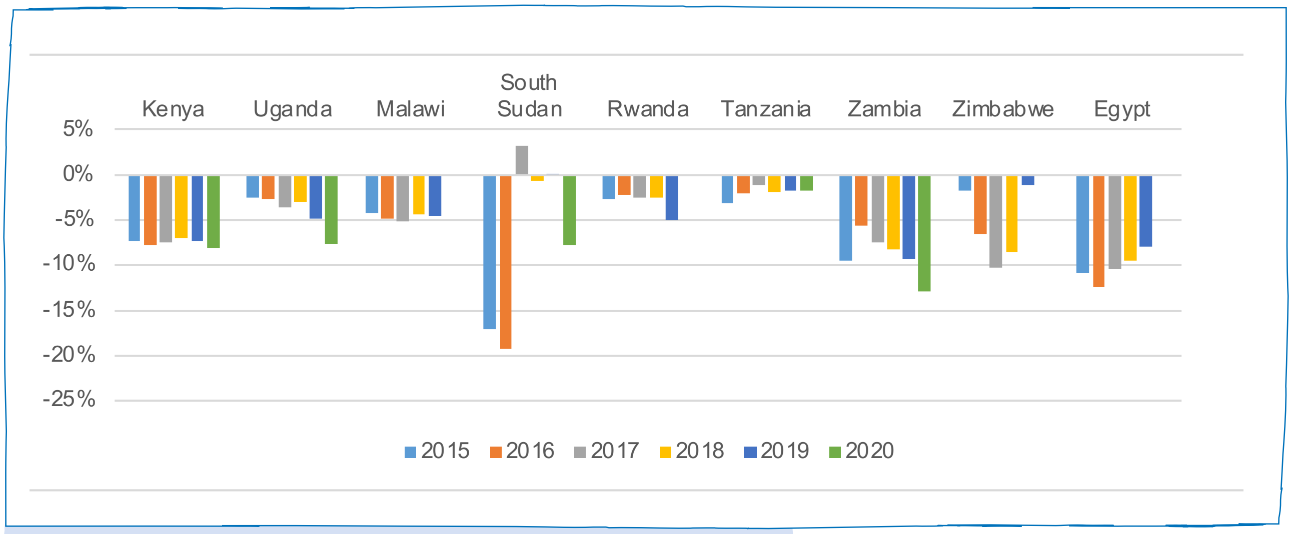
2.1.1 Trends in Fiscal Deficit

Fiscal deficit is when a country's public expenditures outweigh the revenues collected necessitating the adoption of alternative mechanisms for financing government spending such as borrowing. Fiscal deficits in the African region are estimated to have nearly doubled, to 8.4% of GDP in 2020, from 4.6% in 2019[29]. This was a result of countries spending heavily on the economy to ease the economic impacts of Covid-19. This included spending on improving the health systems, expansion of social protection programs, and support to the private sector, for example through tax relief. The increased borrowing by the states to bridge budget deficits has also increased public debt levels. As illustrated in figure 3 below, this is particularly the case in the 8 selected African States under review.

28 Africa Development Bank, African Economic Outlook 2021, https://www.afdb.org/en/documents/african-economic-outlook-2021

29 Africa Development Bank, African Economic Outlook 2021, https://www.afdb.org/en/documents/african-economic-outlook-2021

Figure 3: Fiscal Deficit of Selected African States

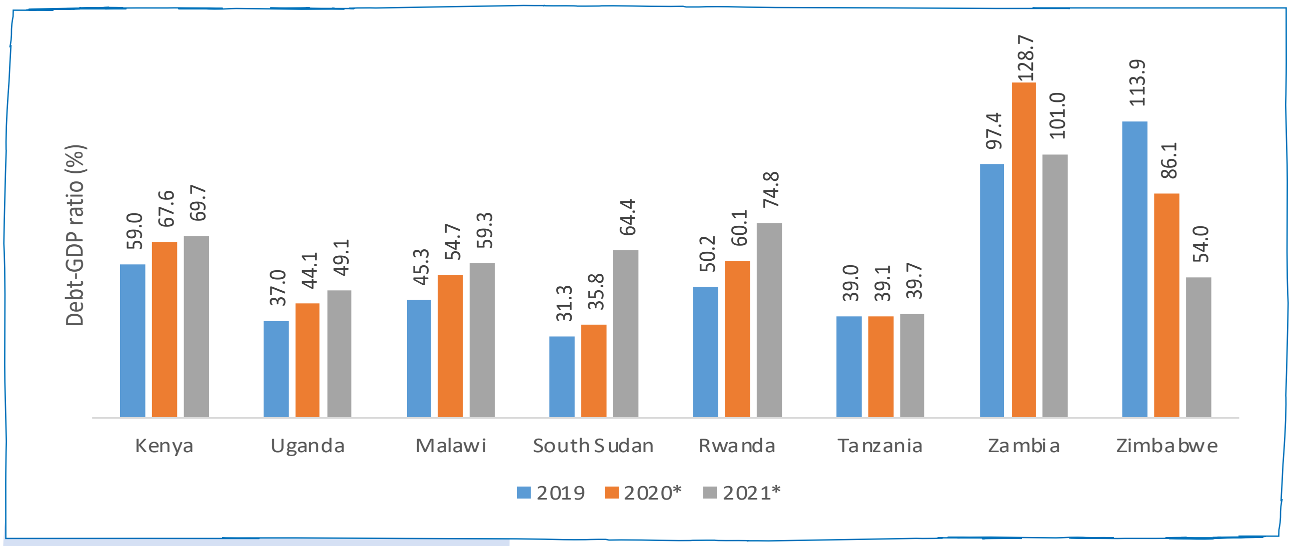


Source: Acepis computations based on data from countryeconomy.com

2.1.2 Trends in Public Debt

The IMF notes that public debt in Sub-Saharan Africa has continued to rise over the past two decades or so, despite the region experiencing economic growth. As of 2020, public debt in the region increased to almost 58% of GDP – the highest level in almost 20 years[30]. The increase has been driven by growing interest expense, high primary deficits, poor governance, weak institutions, ambitious public investment programs, and increased defense-related expenditures. Additionally, the increased spending to boost the economy, due to declined economic growth resulting from Covid-19 prevalence, also increased public debt levels. However, the strong performance of the economies before the Covid-19 Pandemic helped to dampen the rate of growth of the debt-to-GDP ratio. Debt accumulation has however varied across the countries, that is, debt for countries exporting oil and other resources has been driven mainly by exchange rate depreciation and primary deficits, largely as a result of volatility in commodity prices. On the other hand, debt for non-resource-intensive economies has been driven by the need for interest expenditures. This has negatively affected debt sustainability ratings for low-income countries in Africa. Figure 4 below highlights the trends in Public Debt across 8 African countries within the MEESA Region.

Figure 4: Trends in Public debt as a % of GDP

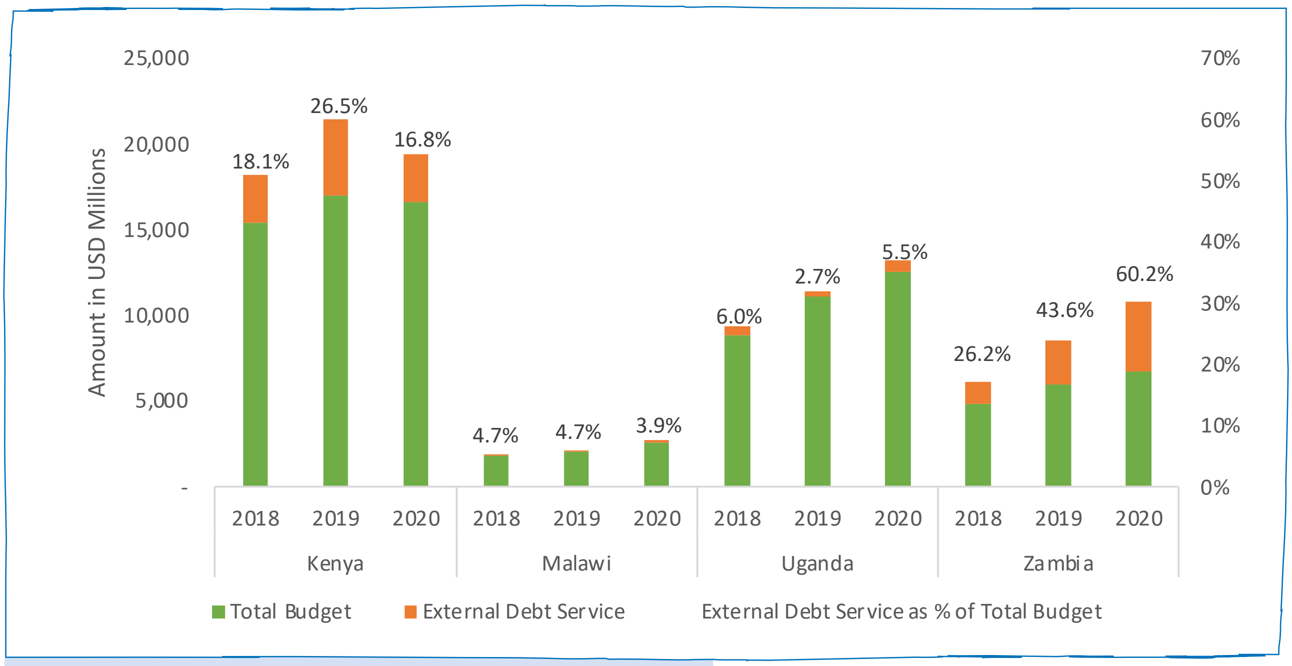


Source: Acepis computations based on IMF

30 The IMF, Regional Economic Outlook 2021 https://www.imf.org/en/Publications/REO/SSA/Issues/2021/04/15/regional-economic-outlook-for-sub-saharan-africa-april-2021

Studies have shown that increasing debt levels increase the risk of crowding out development expenditure as revenues raised are dedicated to debt repayment. Debt servicing costs are usually catered for in-country annual budgets and as such, increasing debt servicing costs translate to reduced amounts of sharable revenue available for the provision of essential services such as education.[31] For sampled MEESA countries, external debt servicing costs have increased significantly, between 2018 and 2020 as shown in Figure 5 below. Zambia has the highest share of external debt service costs as a percentage of total annual budgets averaging 43.4% annually, followed by Kenya, Uganda and Malawi at 20.5%, 4.7% and 4.4% respectively.

Figure 5: External Debt Service as % of Total Budget



Source: Acepis computations based on World Bank Data

2.1.3 Conclusion

Notably, countries within the MEESA region were on a steady growth path prior to the pandemic despite having fiscal deficits since 2015. However, the pandemic resulted in substantive economic shock that slowed down economic activity in the region. This impacted the fiscal space across all countries in the region with governments failing to realize revenue targets and triggering an increased uptake in public debt to bridge the deficits. Consequently, the increased debt portfolio has limited the ability of governments to invest in other critical pro-poor sectors such as education. Whilst the economies of most countries are expected to rebound from the effects of the pandemic, the shocks created, compounded by the degrading of the debt sustainability status for most countries, it is expected that the challenges with a narrow fiscal space are likely to persist. Evidently, this has negatively impacted the ability and flexibility of government to increase investments in social sectors. To this end, the study set out to investigate and analyse trends in allocations and expenditure to the education sector in the financial years 2018/2019, 2019/2020 and 2020/2021 with a particular focus on initiatives aimed at supporting the provision of gender-responsive, disability-inclusive education and climate change education.

31 Cecchetti, S. Mohanty, M. and Zampolli, F. The Real Effects of Debt. 2011. https://www.bis.org/publ/othp16.pdf

SECTION THREE

EDUCATION SECTOR POLICY FRAMEWORK – TOWARDS GENDER, DISABILITY & CLIMATE CHANGE INCLUSION

3.1 INTERNATIONAL POLICY FRAMEWORKS ON EDUCATION

The United General Assembly established global goals (Sustainable Development Goals) that encompass economic, social and environmental dimensions, as a universal call to action to end poverty, protect the planet, and ensure that all people enjoy peace and prosperity by 2030[32]. Among these SDGs are goals that encircle the education sector. The **Sustainable Development Goal 4 (SDG 4)[33]** aims to "ensure inclusive and equitable quality education and promote lifelong learning opportunities for all". The goal is composed of targets to ensure access, equity, equality and non-discrimination in the education sector. Other SDGs that have direct reference to the education sector include: i) SDG 3 target 3.7 addressing Sexual and reproductive healthcare ii) SDG 5 target 5.6 addressing gender equality, iii) SDG 13 target 13.3 addressing the improvement of education, awareness and capacity on climate change.

3.2 REGIONAL POLICY FRAMEWORKS ON EDUCATION

Africa has various education policy frameworks that influence the state of education in the various African states and inform the formulation of national policies and strategic plans. Some of the policies established for all the African states include: (i) **Continental Education Strategy for Africa 2016-2025**[34] which was

32 UNDP, The SDGS in Action, https://www.undp.org/sustainable-development-goals

33 Sustainable Development Goal 4, https://sdg4education2030.org/the-goal

34 Continental Education Strategy for Africa 2016-2025, https://au.int/sites/default/files/documents/29958-doc-cesa_-_english-v9.pdf

developed to set up an effective system of education and training to provide Africa with the capacity to achieve the vision and ambitions of the African Union. Also, ii) the **Continental TVET Strategy**[35] provides a comprehensive framework for the design and development of policies and strategies by the African states to address the challenges of education and technical and vocational training. Other education policies that have been established by Regional Economic Communities in Africa include:

- **SADC Protocol on Education & Training (1997)**[36] Established to promote a regionally integrated and harmonised education system, particularly with regard to issues pertaining to access, equity, relevance and quality of education.

- **SADC Regional Implementation Plan on Education and Training (2007-2015)**[37] Established to provide a map for implementation of the Protocol on Education & Training, 1997. Addresses the components of cooperation and other cross-cutting issues affecting the education sector. It identifies the following: Early Childhood Education and Care, Gender and Culture, Education Management Information Systems, Teacher Education and Development, Higher Education and Training, Technical and Vocational Education and Training (TVET), Curriculum Development including Teaching and Learning Materials, Quality Management and crosses cutting activities related to HIV and AIDS and Information Communication Technologies.

3.3 NATIONAL POLICY AND INSTITUTIONAL FRAMEWORKS AROUND EDUCATION SECTOR

Table 3 below outlines national-level policy and institutional frameworks guiding the realization of the right to education within the MEESA Region.

Table 3: National and Institutional Frameworks in selected African countries across the MEESA Region

COUNTRY	POLICY & LEGAL FRAMEWORK	INSTITUTIONAL FRAMEWORK
Kenya	• The Basic Education Act No. 14 of 2013 • The National School Health Policy of 2009 • The National Pre-Primary Education Policy • The Basic Education Regulations of 2015 and the 100% transition policy • The National ICT Policy in Education and Training of 2019 • National Education Sector Strategic Plan 2018-2022	Ministry of Education
Uganda	• The Education (Pre-primary, primary and Post-primary) Act, 2008 • Early Child Hood Development (ECD) Policy • Education and Sports Sector Plan (ESSP) 2017-2020 • National Physical Education and Sports Policy • Information and Communication Technology in Education Sector Policy (Draft)	Ministry of Education and Sports

35 African Union, The Continental TVET Strategy, https://au.int/en/directorates/education#:~:text=To%20contribute%20towards%20revitalized%2C%20quality,knowledge%20and%20skills%20to%20facilitate

36 Southern African Development Community, Protocol on Education and Training 1997, https://www.sadc.int/documents-publications/show/Protocol_on_Education__Training1997.pdf

37 Southern African Development Community, Regional Implementation Plan on Education and Training (2007-2015), https://www.sadc.int/themes/social-human-development/education-skills-development/

Tanzania	• Educational Reform Act of 1962 • Education for Self-Reliance Policy of 1967 • Universal Primary Education policy of 1974 • Basic Education Master Plan Policy of 1997 • National Higher Education Policy of 1999 • ICT Policy for Basic Education of 2007 • Education and Training Policy of 2014	Ministry of Education, Science and Technology
Rwanda	• The Free Education Policy of 2003 • The Information Communication and Technology (ICT) in education policy of 2016 • The National Science, Technology and innovation policy of 2013/14 • Teacher Development and Management policy of 2016 • Early Childhood Development Policy of 2016 • The Education Sector Strategy Plan (2018/19-2023-24)	Ministry of Education
Malawi	• The National Educational Policy of 2013 • Free Primary Education Policy • National Education Act of 2013	Ministry of Education
Zambia	• National Education Policy of 1996 • Free Primary Education (FPE) policy • The Re-entry Policy • Education and Skills Development chapter of the 7th National Development Plan (SNDP, 2017–2021)	Ministry of General Education
Zimbabwe	• The Education Amendment Act, 2019 • The Education Act of 2006 • Education Sector Strategic Plan 2016-2020 • The Non-Formal Education Policy • The ECD Statutory Instruments/ Policy of 2004 • School Feeding Policy • Teaching Profession Management and Quality Assurance Policy (currently under review) • The School Financing Policy • Circular Minute No. P35 (1999) • Strategies for the Equitable Provision of Inclusive Continuous Quality Teaching and Learning at All Times Including During Emergencies (2021)	Ministry of Primary and Secondary Education
Somalia	• The Draft National Education Policy of 2017 • The National Education Act 2017 • The Teacher education and training policy 2017 • The National Development Plan for Somalia 2017-2019	Ministry of Education, Culture and Higher Education
South Sudan	• The 2017-2022 General Education Strategic Plan • The General Education Act of 2012 • Article 29 of the 2011 Constitution	Ministry of General Education
Egypt	• Article 19 of the 2014 Egyptian constitution • Law No. 62 of 2018 issued by the government • Article 9 of Law No. 39 of 1981-The Education Law • Strategic Plan for Pre-University Education-Egypt National Project (2014-2030)	Ministry of Education

3.4 NATIONAL EDUCATION POLICIES ON GENDER INCLUSION, DISABILITY INCLUSION AND CLIMATE CHANGE EDUCATION

Beyond the general policies on education, African states have established policies, programs and strategic plans to ensure gender, disability and climate change inclusion in education. Some of the established frameworks are informed by the already established international frameworks such as the Sustainable Development Goals SDGs and other regional policy frameworks. Table 4 below highlights some of the national policies targeting the inclusion of gender, special needs and climate change in education.

Table 4: National Educational Policies on Gender Inclusion, Disability Inclusion and Climate Change Education

COUNTRY	GENDER INCLUSION POLICIES	DISABILITY INCLUSION POLICIES	POLICIES ON CLIMATE CHANGE EDUCATION
Kenya	• The Sessional Paper No.14 of 2012 • Basic Education Act No. 14 of 2013 • Education and Training Sector Gender Policy	• Special Needs Education Policy Framework of 2009 • 2013 Basic Education Act • Sector Policy for Learners and Trainees with Disabilities 2018	• The National Climate Change Action Plan: 2018 – 2022 • Draft Guidelines for Mainstreaming Climate Change in curricula at all Levels of Education and Training-Ministry of Environment and Forestry
Uganda	• National Gender Policy (NGP) 1997 • National Strategy for Girls' Education (NSGE)	• Basic Education Policy for Educationally Disadvantaged Children 2006 • Special Needs and Inclusive Education Policy 2011 (Draft)	• The Uganda National Climate Change Learning Strategy (2013 – 2022 • Uganda National Climate Change Policy, 2015. • The Uganda Green Growth Development Strategy 2017/18 – 2030/31
Tanzania	• The National Strategy for Gender Development 2008 • The Sexual Offenses (Special Provisions) Act, 1998. • Education Regulations Act 2002 • Women and Gender Development policy (2000)	• Persons with Disabilities Act, 2010 • National Strategy on Inclusive Education 2009-2017 • Strategy for Inclusive Education 2018-2021	• National Climate Change Response Strategy 2021-2026 • Tanzania Education and Training Policy, 1995
Rwanda	• National Gender Policy • Girls Education Policy, 2008 • Education Sector Strategic Plan 2018/19-2023/24	• Education Sector Strategic Plan 2018/19-2023/24 • Special needs & Inclusive education policy 2007 • Revised Special Needs & Inclusive education policy 2018	• The Constitution of Rwanda • Education Sector Strategic Plan (2019-2024) • National Environment and Climate Change Policy, 2019

Malawi	• Gender Equality Act, 2013 • Constitutional Amendment Act No. 36 • The National Gender Policy, 2015	• Persons with Disabilities Act, 2019 • National Special Need Education Policy Guidelines, 2009 • National Strategy on Inclusive Education, 2017-2021	• Constitution of the Republic of Malawi • Malawi's Strategy on Climate Change Learning 2021 • Malawi Vision 2020 • Malawi Growth and Development Strategy III • National Climate Change Management Policy • The Environment Management Act • National Education Investment Sector Plan
Zambia	• Education Act No.23 of 2011 • Gender Equity and Equality Act No.22 of 2015 • Adolescent Sexual and Reproductive Health Policy • Anti-Gender Based Violence Act No.1 of 2011	• Policy on Inclusive Schooling Program of 2016 • 2017-2021 National Development Plan • National Policy on Disability (2013) • Article 99 of the Education Act (2011)	• National Climate Change Learning Strategy
Zimbabwe	• National Gender Policy 2013 • The 2019 Amended Education Act • Zimbabwe School Health Policy, 2018 • Circular Minute No. P35 (1999)	• Education Act of 1987 • Zimbabwe School Health Policy, 2018 • Secretary's Circular No P36 of 1990 • The Education Amendment Act, 2019	• 2021 National Development Strategy • 2019 National Adaptation Plan • 2017 National Climate Policy • 2014 National Climate Change Response Strategy • Education Sector Strategic Plan 2016-2020 • National Climate Change Learning Strategy 2020-2030
Somalia	• The 2018 – 20 UN Somalia Gender Equality Strategy • Education Sector Strategic plan 2018 – 2020 • National Gender Policy	• Education Sector Strategic Plan 2018-2020 • Somalia Education for Human Development Project Stakeholder Engagement Plan	• The National Education Plan 2011 • National Climate Change Policy 2020
South Sudan	• General Education Act, 2012 • Girls' Education Strategy 2015-2017	• National Inclusive Education Policy 2014 • General Education Strategic Plan, 2017-2022	• National Teacher Education Strategy • National Adaptation Programme of Action (NAPA) to Climate Change

Egypt	• Strategic Plan of Pre-University Education 2014 -2030	• Strategic Plan of Pre-University Education 2014 -2030 • 1981 Education Law	• Egyptian Biodiversity Strategy and Action Plan (2015-2030)

3.4 EMERGING ISSUES REGARDING EDUCATION SECTOR POLICIES – CHALLENGES/OPPORTUNITIES?

- **Frequency of policy reviews;** whilst there exists a fairly robust framework of policies guiding implementation of programmes and initiatives in the education sector across all countries in the MEESA region, there appear to be gaps in terms of monitoring and review. Evidence from across the region indicates that reviews of sector policies and plans seem to be inadequate considering the need to regularly interrogate the policies to determine their effectiveness, efficiency and appropriateness over time. There is limited evidence of regular and robust policy reviews. What exists are sector reviews which also appear dated considering country-level sector plans and implementation periods. This may be impacting policy-making – especially with regard to costing of education sector needs.

- **Institutional and Human Resource Capacity gaps;** policies are implemented by people and facilitated by effective and strong institutions. Where there are capacity gaps – both institutional and human resources, outcomes are bound to be limited. There are notable gaps in some countries in the MEESA region regarding capacity to make policy, implement and review outcomes. This is for instance in areas of special needs, STEM, climate change education and overall sector management. For example, in countries like Uganda and Somalia, insufficient capacity for identification and evaluation of learners with special needs has limited ability of the State to cater to the needs of learners with disabilities in the education system. Also, in some countries, especially where there has been devolution of the education function, capacity challenges impact management of resources and remit inefficiencies that limit outcomes in terms of access, equity and quality of education.

- **Specificity of policies (SNE, gender, CCE);** The education sector is required to respond to specific needs of learners, especially those remitted by gender inequities, special needs and emerging challenges arising from climate change. There are notable provisions in most of the policies across the region that address and respond to such specific needs. However, it is notable that existing policies do not provide necessary specificity and attention to these specific needs. For instance, there are policies that target addressing gender inequities for instance that are domiciled within other broad policies; or those that seek to address climate change education needs but are fixed in other sector policies like laws, plans and policies for overall climate change action. Inadequacies in terms of specificity of existing policies limit policy attention, resourcing and monitoring of outcomes. Although across the region there are more specific policies seeking to deal with gender inequities, and to some extent also special needs, the area of climate change education still lacks robust, specific and adequate policy provisions.

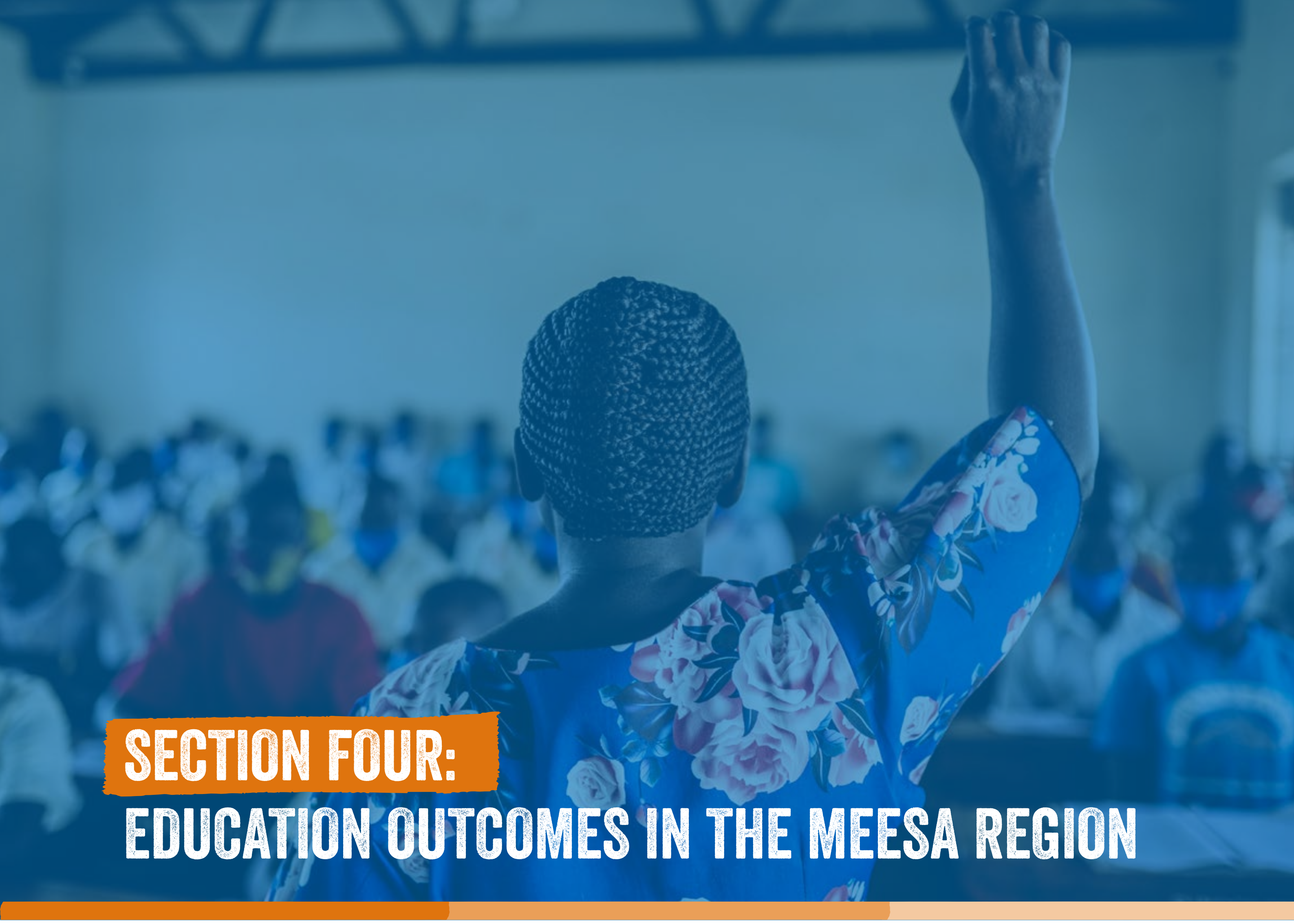
- **Implementation gaps & inefficiencies in the execution of sector programmes;** there appear to be significant gaps between plans and programmes implemented in the sector. Polices across the region appear robust enough to provide for and guide implementation of programmes that can lead to desired outcomes. However, there are significant gaps between policy objectives and programmes that are implemented and their outcomes. Such gaps are attributed largely to resource/funding deficiencies, policy incoherence and harmony with other policies, political will, corruption and capacity gaps. For instance, many countries in the region implement some form of ‘free education policy’, especially at basic education level. This is espoused in commonly referred to Free Primary Education (FPE) policies. However, implementation of such FPE policies appears to be inadequate thus limiting outcomes. For example, whilst the FPE policies attract large influx of learners that signals improvements in access, the policy appears not to be accompanied by commensurate investments in infrastructure, facilities and equipment necessary to sustain teaching and learning. Resources do not match human resources demands (teacher training and remuneration) which in turn leads to declines in quality.

- **Focus on basic education vs other levels**: Considering the various levels of education, there remains an over-focus on basic education across the region. This is in terms of policy development, resource allocation and programmes. As such, outcomes appear more advanced for ECDE, primary and a bit of secondary levels of education. There are concerns that more attention needs to be now paid to post-basic education, especially to TVET and tertiary education (universities and colleges) because more learners are emerging from basic education hence creating demand for improvement of facilities, infrastructure and systems for post-secondary education. Nonetheless, for many countries in the region, policy and institutional development for post-secondary education still require substantive attention and resource investments.

- **Costing of education needs and plans:** Without proper costing, education sector programmes risk receiving inadequate funding to guarantee targeted outcomes. There are notable gaps and inadequacies in terms of costing of education needs across the region that appears to limit scope of resources available to the sector. This manifests in allocations that do not consider increases in enrolment and demand for education and emerging trends like inflation, and changes in cost of requisite commodities and services. There are notable cases for instance in Kenya where the capitation fund, designed with requisites determined more than a decade ago, seems to have not kept pace with realities in 2022[38]. Also, there is notable adoption of new curriculums across many of the states in the region. This has had significant implications in terms of costing and assuring resources necessary, especially in countries where competency-based curriculums have been introduced. The net effect is that the sector not only receives inadequate funding but also underfunds some sub-sectors that may require more funding due to changes in the demographics of learners and emerging needs like ICTs.

- **Inclusiveness of policy-making processes**: The realm of public policymaking is for the people. This is not only because it is now required by law (in most of the jurisdictions) but also because it is the right and more efficient thing to do. As such, objectives and targets of policies in the education sector must equally aim to put the needs and interests of learners at the centre. Achieving this requires substantive and meaningful participation of every relevant stakeholder in policy-making processes including budget processes and expenditure tracking. Notably, there remains room for States in the region, through relevant Ministries, Departments and Agencies (MDAs) to facilitate suitable mechanisms for every stakeholders’ voice to be included. There are variances remitted by political economy dynamics of the various states. In some states, good progress has been made – however, for most of the states, there is need for advocacy for more inclusion especially of civil society, experts and media in education sector policy-making processes, to ensure the most salient issues are addressed and enhance accountability.

38 Republic of Kenya (2021). Education Sector Report. Ministry of Education. https://docs.google.com/document/d/1LjALrjjHEN-X2Fw0FA2nQDxb155F-6BroiwIhB83DtM/edit



SECTION FOUR: EDUCATION OUTCOMES IN THE MEESA REGION

4.1 OVERVIEW OF STATUS OF EDUCATION OUTCOMES

The countries in the Middle East, Eastern, and Southern Africa (MEESA) region have had varied performances in the education sector indicators. In line with the Sustainable Development Goal (SDG 4) of ensuring equitable and inclusive quality education for all, various governments within the MEESA region have put in place various mechanisms to ensure a universal basic education is achieved. As a result, the Gross Enrolment Ratio (GER) in primary school in most countries in the region except Somalia and South Sudan has been impressive. South Sudan and Somalia have had a long history of fragmented development in the education sector caused by prolonged conflicts and state fragility[39]. Both the Gross Enrolment Ratio (GER) and Net Enrolment Ratio (NER) have not been very satisfactory in secondary school across most countries in the region. While secondary school is increasingly 'fee-free' across the region, attending still comes at a cost. These include non-tuition costs such as uniform, boarding cost, learning materials, school feeding programs, and transportation. Most disadvantaged students live in rural areas further away from schools and transport links. Despite achieving gender equality globally in education, progress has stagnated and girls continue to be at a disadvantage. Teen pregnancies and early marriages often force girls out of school, while the pressure to earn income pushes boys to drop out. Factors that affect school enrolment and retention vary across countries but are mainly associated with poverty, armed conflict, poor school infrastructure, drought, and famine. Existing societal norms that favour boys' education over girls also exasperate the gender disparity in learning.

39 Education for All Global Monitoring Report file:///C:/Users/HP/Downloads/219351eng.pdf

4.2 ACCESS

Generally, the region has made significant progress toward increasing access to education. Across the board, as illustrated in Table 5 below, all countries have achieved high increases in enrolment rates. Most of the gains in terms of access are observable in basic education (mostly primary education). This signals substantive increase in opportunities for learners from all backgrounds to access education, especially at the basic level (primary).

Whilst enrolment rates have increased in general, it is notable that incidences of dropouts and out-of-school children remain high in the region. According to the Tanzania Mainland Education Sector Strategic Plan (2020 – 2025), average dropout rate in primary education (cycle 1) increased to 0.89% in 2019 and there has been a decline in overall learner retention in Tanzania as measured by the basic education survival rate[40]. In Zambia, despite the free primary education policy, and a reported enrolment of approximately 90% (2016), there are still more than 250,000 pupils out of school at this level[41]. Drop-out rates are especially higher among girls than they are among the boys which is largely attributed to teenage pregnancies, early marriages and the low parental value for the education of girls. Although the government has a Re-entry Policy that allows girls to go back to school after giving birth, there are still many barriers that hinder pregnant girls' retention in school. In Uganda, the World Bank (development indicators) estimates that there were about 1,268,183[42] in 2018. This has been attributed to substantial out-of-pocket costs and inadequacy of the capitation grants sent to schools. Although the real relationship between costs and attendance needs a lot more explanation, there is sufficient evidence to prove that costs are a great factor that determines attendance and access to both primary and secondary education.

40 The United Republic of Tanzania. The Education Sector Plan (2020-2025). Ministry of Education, Science and Technology.

41 HALI Access Network, 2016. Education Fact Sheet- Zambia.

42 Uganda- Children Out of School-2015. Available at: https://tradingeconomics.com/uganda/children-out-of-school-primary-wb- data.html#:~:text=Children%20out%20of%20school%2C%20primary%20in%20Uganda%20was%20reported%20at.compiled%20from%20officially%20recognized%20sources

Table 5: Education Sector Outcomes within the MEESA Region

KEY INDICATORS[43]	KENYA	UGANDA	TANZANIA	EGYPT	SOMALIA	SOUTH SUDAN	ZIMBABWE	RWANDA	MALAWI	ZAMBIA
Gross Enrolment Ratio, Pre-Primary	78.4	9.9	86.7	29.3		11.59	57.24	29.8	83.6	8.7
Gross Enrolment Ratio, Primary	104	109	110.3	106.41	14.4	79.4	107.55	138.8	126	102.6
Gross Enrolment Ratio, Secondary Education	70.3	24.5	43.9	89.48	14.3	11	78.6	53	22.1	45
Net Enrolment Ratio, Pre-Primary	77.2	9.5	37.5		5.6		25*	24.6		
Net Enrolment Ratio, Primary Education	92.4	91	95.4	97	17.3	35	94.1*	95	88	83
Net Enrolment Ratio, Secondary Education	53.2	21.9	33.8	83	9.3	5.5	48.7*	36	14.6	20.2
Gender Parity Index, Pre-Primary	0.96	1.2	1	1.0			0.99	1.04	1.01	
Gender Parity Index, Primary	0.97	1.1	1	1.01	0.81	0.71	0.99	0.98	1.05	1.02
Gender Parity Index, Secondary	0.95	0.86	1.1	0.99	0.7	0.54	1.02	1.13	0.96	0.89
Transition Rate, Primary to Secondary Education	83.3	60.5	73.2	97			82.16	73	36.5	97.3
Completion Rate, Primary	84.2	60	69.2	105		27	75.65	97	50	80
Completion Rate, Secondary	78.5	34.8	34.7	88.4		18*	71.8	42.5	19.8	54.8*
Dropout Rate, Primary	27	32	0.89	1	14.7	62	0.54	6	4.4	15
Literacy Rate (15+ years)	81.5	73	77.9	71	33.95	34.5	88.3*	73	72.9	87

**Based on latest available official data.*

43 World Bank-Education Data https://data.worldbank.org/topic/education; UNESCO Institute for Statistics, Data for Sustainable Development Goals http://uis.unesco.org/; Ministry of Education, Kenya's National Education Sector Strategic Plan 2018-2022 https://assets.globalpartnership.org/s3fs-public/document/file/kenya-nessp-2018-2002.pdf?VersionId=tdCPzVW5gwJ1DODlRJsOWkwpP7BDDrKv ; Equip2 Lessons Learned in Education, Education Information Management Systems https://www.fhi360.org/sites/default/files/media/documents/EQUIP2%20LL%20EMIS%20AAR.pdf

Further, there remain gaps in terms of access to learners with disabilities. Whilst progress has been made in terms of disability inclusion there remain significant inadequacies in terms of schools dedicated to the special needs of learners with disability/special needs. Whereas some countries like Kenya, Rwanda and Uganda, have made significant progress in terms of identification and inclusion of learners with disabilities into the education system, many others continue to struggle with this category of learners. There remain barriers preventing children with disabilities from accessing education. For instance, according to the South Sudan General Education Strategic Plan - distance to school, negative attitudes and lack of teacher experience are considered some other the major hindrances to disability inclusion in education[44]. Further, lack of an inclusive education curriculum and resources limit access to education for learners with disability. Learners with disabilities are highly stigmatised and have low levels of access and participation in education in many parts of the MEESA region. Limited awareness about the rights of learners with disabilities and challenges regarding identification of learners with SEN continue to limit access. There is also increased need for special needs teachers and materials to support inclusive classrooms and teaching modalities.

Notably, gender parity indices at primary school level across all States in the region show significant increase in access to education for both boys and girls. In fact, for some countries, like Rwanda, the GPI shows more opportunity for girls than boys - pre-primary (1.04), primary (0.98), and secondary (1.13) levels indicate a disparity in favour of females. Nonetheless, gender-based inequalities continue to negatively impact access to education for girls in most of the jurisdictions in the region. In South Sudan for instance, the proportion of female students has stagnated in ECDE; and there are evident decreases in gender parity from lower to upper levels of education. The Uganda Demographic and Health survey in 2016 revealed that the GPI at the secondary level stood at 0.86 and 1.1 at the primary school level, meaning that more boys than girls had access to education[45]. Further, wider gender gaps are seen in key education outcomes such as transition, literacy, and dropout rates. At primary school level, the enrolment rates of girls are notably higher than that of boys at 83.5%. However, only 60% complete P7 and 22% are enrolled in secondary school. Various issues such as teenage pregnancy and cultural norms and practices such as FGM and early marriages prevent girls from completing their education. Overall, girls achieve lower learning outcomes and remain under-represented in TVET programmes and higher education in the region.

Table 6: Comparison of the Gender Parity Indices in Uganda, Rwanda and South Sudan

COUNTRY	PRE-PRIMARY	PRIMARY	SECONDARY
Rwanda	1.04	1.01	1.25
Uganda	1.2	1.1	0.86
South Sudan	0.92	0.68	0.46

Source: Extracted from Table 5

Lastly, there also remain considerable disparities in access to education remitted by income inequalities across the region. In South Sudan, whilst considerable progress has been made in increasing access to education, this has not been even across wealth quintiles and different socio-economic groups. In Somalia, inherent inequalities remitted by fragility, geography and income disparities limit access and learning outcomes for some learners. Inequities are experienced particularly amongst pastoralist and nomadic

44 The Republic of South Sudan (2017). The General Education Strategic Plan, 2017-2020. Ministry of General Education and Instruction. https://docs.google.com/document/d/1EP1sNzjgGhTCv-O9dmtut5t39lGi0DIBnDbQ4Vy6v5o/edit

45 Uganda Bureau of Statistics (2016). Uganda Demographic and Health Survey. https://dhsprogram.com/pubs/pdf/FR333/FR333.pdf

populations, IDPs, and learners from the poorest wealth quintiles (including urban poor) in Somalia[46]. In Zambia, the Gini coefficient [which measures income inequality] stands at 0.69, higher than that of Africa (0.43). Despite primary education being free to all, children from lower-income households in rural areas are less likely to attend school than those in more affluent situations. Disparities in access remain between urban and rural communities. In South Sudan, there are notable disparities in terms of access to education between and within states. This is particularly critical in the northern states and risk-affected areas. Access to primary varies from 38% in Jonglei to 173% in Northern Bahr el Ghazal. Poverty is a major factor preventing parents from sending and keeping their children in school. Difficulty to pay fees and inability to afford uniforms, exercise books and other school-related costs, restrict students' access to education. In Kenya, it is notable that learners from lower-income households show lower rates in enrolment, retention, completion and transition when compared to those from higher-income households. More than 60% of children from urban informal settlements (slums), especially in large cities, are currently not benefiting from the public spending on primary education on no examination-related expenditure.

4.3 EQUITY

Equity in education is when every student receives the resources needed to acquire the basic work skills of reading, writing, and simple arithmetic. It measures educational success in society by its outcome, not the resources poured into it. Educational equity, therefore, means the educational system giving each student what he or she needs to perform at an acceptable level.[47] According to the Organization for Economic Cooperation and Development (OECD), equity in education has two main dimensions; fairness and inclusion. Fairness means making sure that personal and social circumstances-for example gender, socioeconomic status, or ethnic origin should not be an obstacle to achieving educational potential. Inclusion ensures a basic minimum standard of education for all-for example that everyone should be able to read, write, and do simple arithmetic.

Whilst several countries in the MEESA region have made good progress towards increasing access to education, the question of equity remains pertinent. The quality of education between learners in public and private schools remains disparate**.** Inequities manifest in terms of disparities in resources, quality of teachers, and teacher/pupil ratio.[48] Public schools still remit performance levels that are not at par with private schools. This is attributed to inadequate learning resources, understaffing, crowded classrooms, dilapidated facilities, lack of motivation for teachers, large workload, absenteeism by both teachers and students, and little or no support from parents. High-performing private schools tend to have smaller class sizes, are well equipped, and have numerous academic and extracurricular activities. A study carried out by Uwezo – a nongovernmental organization in Kenya, Uganda, and Tanzania revealed that students in private schools aged 10-16 years outperformed their peers in public schools in literacy and numeracy tests.

Also, due to the disparities in income across different regions, some schools are more endowed with resources than others. This has had implications on equity in education. In terms of costing of education needs, governments appear to take insufficient consideration of the inequalities that exist across sub-national regions that remit disparities in terms of the cost of education. For instance, in Kenya government allocates capitation grants to primary schools irrespective of regional resource disparity. Some governments in the region are implementing programmes that aim to address such inequities. In Uganda, the Peace

46 Federal Government of Somalia. Education Sector Strategic Plan (2018-2020). Ministry of Education, Culture and Higher Education. https://docs.google.com/document/d/1dclhpz-Ec1pJBHy_YUoCjfvqAfcFMq70Fi3GNeP7Rss/edit

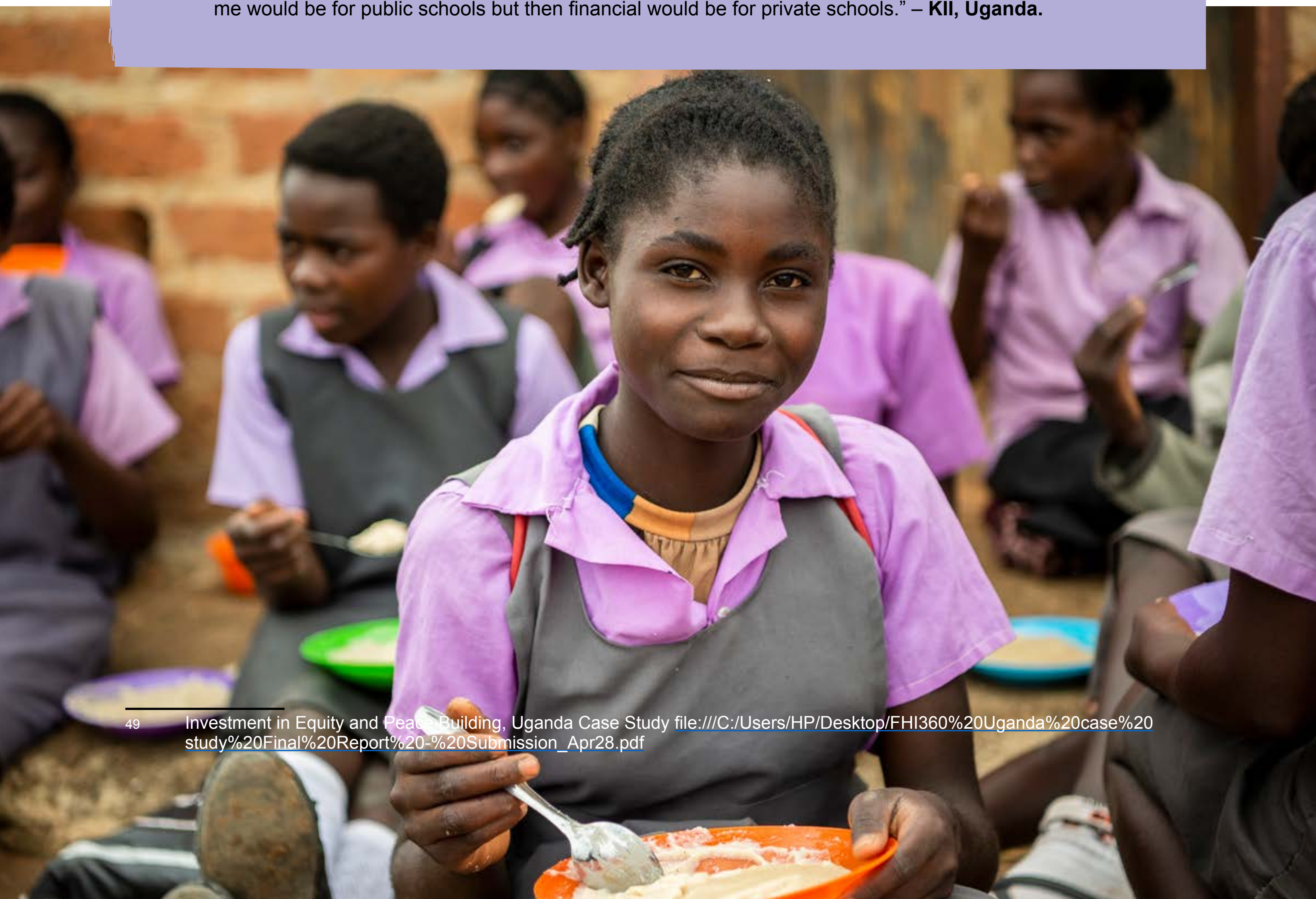
47 What is Educational Equity and Why Does it Matter? https://www.thebalance.com/equity-in-education-4164737

48 Republic of Kenya Ministry of Education, 2016 Basic Statistical Booklet https://www.education.go.ke/images/REPORTS/Basic-Education-Statistical-Booklet---2016.pdf

Recovery and Development Program (PRDP) seeks to reduce disparities in infrastructure investment between the north which is underdeveloped partly due to persistent conflict, and the rest of the country.[49] Also, the teacher recruitment policy is intended to close teacher shortages across regions, foster equity in instructional quality, and ensure a unified, national approach to education.

Further, imbalances in resource allocations to the sector (emphasizing on remuneration of teachers) imply that budget allocations are constricted and unable to sufficiently cater for operations, maintenance, and development of infrastructure and facilities in schools. Thus, in many jurisdictions like Malawi, Zimbabwe, Zambia and South Sudan, households have to meet most of the operations, maintenance, and development costs. This increases inequality and has negative implications for learners from low-income and marginalized communities (especially in rural areas and urban poor) as they are forced to make choices between household expenditures and financing education out of pocket.

> In terms of the budget that is allocated to primary and secondary education, it is very high in terms of percentage. But the main challenge that the ministry is faced with is 98% of it goes towards the remuneration of teachers and all. That leaves a very small percentage for programming and any other needs related to ensuring that the ministry runs the needs of the ministry very well.” – **KII, Zimbabwe**
>
> “Financial accessibility is a concern for both private and public schools. Private schools seemingly or annually become expensive. Every single year there’s a particular increase in private school. Even as much as you feel you can afford a public school, primary, secondary, or even university or tertiary institution, ideally, you would want to understand why this increase keeps happening. Of course, it keeps happening because of the expenses in other resources that the school uses to run the school. Issues of accessibility geographically for me would be for public schools but then financial would be for private schools.” – **KII, Uganda.**



49 Investment in Equity and Peace Building, Uganda Case Study file:///C:/Users/HP/Desktop/FHI360%20Uganda%20case%20study%20Final%20Report%20-%20Submission_Apr28.pdf

Despite various interventions by the government, achieving 100% transition to secondary school remains a challenge in many jurisdictions in the region. Nonetheless, governments are increasingly introducing programmes targeting better funding of secondary education. In Uganda, Universal Secondary education (USE) seeks to reduce barriers to secondary school participation by providing public funding subsidizing school tuition fees. In Kenya, the Free secondary education programme seeks to achieve similar objectives. However, many of such free secondary education attempts have failed to address inequities and guarantee 100% completion and transition. In Uganda, while the USE policy has served to increase enrolment in lower secondary schools, it has failed to address the issue of equity as the capitation grant is tied to the number of qualifying students at each school with disregard to the location (socio-economic background) of the school.50 In 2015, the government of Tanzania implemented the Education and Training Policy 2014, directing public bodies to ensure that pre-primary, primary and junior secondary education is cost-free for all which abolished all fees and contributions.[51] In Tanzania, the policy has increased the enrolment of disadvantaged groups. Free education has reduced delayed entry into schooling, incentivized enrolment and reduced dropout, especially for girls and children in rural areas.[52]

4.4 QUALITY

There are concerns that the expansion in enrolment and progression to higher levels has lacked supporting improvements in the quality of schooling. Across the region, sector reviews highlight several obstacles to improving the quality of education. These include a shortage of qualified teachers that leads to high pupil-teacher ratios, weak pedagogical strategies employed by teachers, and limitations in available infrastructure, facilities, books and equipment, especially for STEM. For instance, in Tanzania, the pupil-teacher ratio at the primary education level is 1:55 and 1:24 for secondary level[53]. The ratio has the potential to influence learning outcomes, especially at the primary level. It is also notable that there are challenges with availability of textbooks which remains a major barrier to learning among pupils thereby impacting the quality of the learning outcomes. This has been attributed to inadequate funding and systemic weaknesses in the execution of the textbook procurement policy.[54] In Somalia, there remain challenges in terms of quality of education that are attributed to capacity limitations among teachers and other human resources in the sector[55]. The Education Sector Strategic Plan (2018 -2020) acknowledges that there are insufficiencies in terms of teacher competencies in subject content, pedagogy and languages of instruction (English) that stakeholders see as a limitation to achieving curriculum delivery, inclusion, and overall learning outcomes. There are also notable shortages in terms of adequately qualified teachers and lecturers, and of laboratory equipment and materials in schools, TVET institutions and HEIs, across most of the jurisdictions in the region.

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50 Universal Secondary Education in Uganda: Blessing or curse? The Impact of USE on educational attainment and performance https://www.researchgate.net/publication/283641062_Universal_Secondary_Education_USE_in_Uganda_blessing_or_curse_The_impact_of_USE_on_educational_attainment_and_performance#:~:text=In%20follow%2Dup%20to%20Universal,education%20for%20economically%20vulnerable%20families.

51 Tanzania implements Free Education Policy for Secondary education https://www.right-to-education.org/es/node/752#:~:text=Tanzania%20Implements%20Free%20Education%20Policy%20For%20Secondary%20Education,-28%20Enero%202016&text=On%20November%2027%2C%202015%20the,is%20free%20for%20all%20children.

52 Effects of Free Education on Enhancing Access to Primary Education in Tanzania https://www.researchgate.net/publication/322951760_Effects_of_Free_Education_on_Enhancing_Access_to_Primary_Education_in_Tanzania_A_Case_of_Newala_District_Mtwara_Region#:~:text=The%20results%20revealed%20that%20free,5%2D7%20year%20or%20less.

53 The United Republic of Tanzania, Ministry of Education, Science & Technology (2019). Education Sector Performance Report (2018/19). https://www.globalpartnership.org/sites/default/files/document/file/2020-05-Tanzania%20Mainland-ESP-IR_0.pdf

54 http://www.betuz.org.zm/assets/report-on-status-of-education-in-zambia.pdf

55 Federal Republic of Somalia. Education Sector Strategic Plan (2018-2020). Ministry of Education, Culture, and Higher Education. https://docs.google.com/document/d/1dcIhpz-Ec1pJBHy_YUoCjfvqAfcFMq70Fi3GNeP7Rss/edit

4.5 EMERGING ISSUES ON THE STATUS OF EDUCATION IN THE REGION

Despite progress, there remain outstanding gaps, especially regarding inequalities in access, quality and inclusiveness that continue to limit overall outcomes and responsiveness of the sector, particularly considering responsiveness to Gender, Disability and Climate Change. Some of the most significant issues are highlighted as follows.

- **There remain significant Human Resources shortages in the education sector that limit education outcomes across the board.** The sector lacks adequate trained and qualified teachers to match demand across all States in the region. The system is characterised by inadequacies in infrastructure facilities/ Institutions for training teachers, insufficient teacher educators and limitations in capacity on pedagogical skills. In some cases, like Somalia and South Sudan, there are acute inadequacies of qualified teachers with proper mastery of English, the major language of instruction. In South Sudan, the designation of English as the language for training makes recruitment of teachers and delivery of the new curriculum a challenge, especially in the North, where the majority of teachers are of Arabic background[56]. As a result, class sizes are large, especially in lower grades, suggesting a shortage of teachers. In Kenya, the Teacher's Service Commission (TSC) estimates an overall teacher shortage of 96,345. These shortages have been attributed to resource challenges due to competing funding demands in the budget, rapid growth in school enrolment occasioned by the implementation of the Free Primary Education (FPE) and Affordable Day Secondary School Education programmes and establishment of new schools. Some commentators also attribute the shortages to inadequacies in the policy framework on identification and deployment of teacher educators and the lack of institutionalized school-based teacher development and classroom-based teacher support and research. In Somalia, there remain human resource limitations, especially shortage of pre-primary, science and mathematics teachers that limit sector outcomes. Also, there are challenges in terms of teacher distribution and deployment, especially in rural areas. For instance, in 2019, the Pupil-Teacher Rate (PTR) in primary education rose from 52 to 55 attributed largely to a continuing increase in the number of pupils without a commensurate increase in number of qualified teachers. Enrolment in teacher training colleges has stagnated - same as the number of TTCs. As such, while many jurisdictions have made significant improvements in terms of curriculums – some introducing competency-based curriculums, that address critical issues including safety and social cohesion, their implementation remains hampered by human resource limitations.

Table 7: Pupil-Teacher Ratio, based on 2015 data (latest)

COUNTRY	PRIMARY	SECONDARY
Kenya	31	30.65
Uganda	43	21.75
Tanzania	42	20.86
Egypt	23	15
Somalia	35.5	23
South Sudan	47	27
Zimbabwe	36	23
Rwanda	58	19
Malawi	70	38
Zambia	43	47.9

Source: UNESCO Institute for Statistics (http://uis.unesco.org/)

56 The Republic of South Sudan. New curriculum. https://docs.google.com/document/d/1ddp8BC3GhRAUdxIgfUlfV8R2GY6C79E3iPpO3IDdcF4/edit

- **Inadequate government investment in the sector: The education sector receives a relatively high budgetary allocation compared to other sectors across the region. However, allocations to the sector appear inadequate to achieve all planned targets which significantly impacts access and quality of education at all levels.** Investments into the sector remain below par when compared with international standards – many governments in the region appear to have not met the recommended 15%–20% allocation of the overall government budget to education. This is understood to limit further investments into the sector and outcomes sought. Whilst it is notable that the budget for education has increased significantly over the past decade, there remain funding gaps that limit progress. This has led to low investment in education inputs (like infrastructure and equipment), low salaries and delayed salary payments, making the teaching profession unattractive and jeopardizing the delivery of quality education. The education sector in Uganda accounts for about 10.5% of the national budget in FY 2019/20[57], which is slightly higher than other sectors. In Kenya, despite an increase in the size of education expenditure, real average (public/government) spending (per capita spending) on education per child has remained the same since 2011. Also, a significant proportion of spending on education is off-budget, mainly from households and development partners. It is however notable that public expenditure on pre-primary, primary and secondary education significantly benefits the bottom 40% and as such considered pro-poor. According to MoGE in Zambia, a major inhibiting factor to undertaking planned improvements is that the sector is under-resourced as a result of macroeconomic pressures over the past 5 years[58]. Budget allocations to the sector over the past decade have on average been lower than SADC minimum threshold for education financing and GPE recommendations. Also, there are significant disparities between approved budgets and actual amounts released to MDAs which have had a negative impact on performance of the education sector. In Zimbabwe, stringent macro-economic conditions over the past decade, characterised by high inflation rates and changing monetary policies, resulted in high staff turnover and devaluing of financial resources for operations. This has also limited the ability of government to adequately fund the education sector. As such, whilst basic education is considered free, a lot of schools rely on fees and levies which do not meet necessary expenditures – especially due to non-payment.

- **Inadequacy of infrastructure, facilities and equipment remains a significant limitation to progress in the sector**. Majority of schools lack adequate basic learning equipment like desks and chairs, chalk and blackboards. In South Sudan, the sector lacks sufficient infrastructure (classrooms, teacher houses and toilets), sanitation, water and Menstrual and Hygiene Management (MHM) facilities, especially in rural areas. This has manifested in overcrowded classes, unsafe sanitary conditions and long distances to school that mostly affect especially girls, and limit retention and overall learning outcomes. In Zambia, limited infrastructure and facilities have impacted transition and completion, especially at secondary level due to the limited number of places available, resulting in a reported pupil registration of only approximately 40%. According to MoGE, there is a shortage of places after the first two years of secondary education which has contributed to declines in retention rate for females in the 13+ age group. Out of 10,167 schools in Zambia, 9,050 (90%) are primary schools, while 1,117 (10%) are secondary schools, signaling substantive infrastructure gap in secondary school education. In Rwanda, late school entry, coupled with increased repetition rates at primary level, means many children are retained in primary beyond the expected age. This has led

57 The National Budget Framework FY 2019/20: Investing in Education by UNICEF. Available at: https://www.unicef.org/esa/media/3911/file/UNICEF-Uganda-2019-2020-Education-Budget-Brief.pdf

58 Republic of Zambia, Ministry of National Development Planning (2017): The Seventh National Development Plan (2017-2021). https://www.mndp.gov.zm/wp-content/uploads/2018/05/7NDP.pdf

to higher numbers of learners in primary schools, which impacts class size. EMIS data indicate that primary PCR ranges between 63 to 98.3 and considerably high in such districts as Nyanza, Ngororero and Gisagara[59]. In South Sudan, learners cover long distances to school and there are inadequacies in terms of number of schools offering the full primary cycle (all 8 grades) and secondary school places. This limits access – about 41% of primary lack opportunities for grade continuity. Also, not all counties have secondary schools[60]. This predisposes children to the potential risk of dropping out early from school which explains high school dropout rates in the country. Special needs education has been largely disadvantaged in terms of limitations in additional funding required to provide customised infrastructure and materials. There also remain significant challenges with regard to providing necessary WASH facilities and infrastructure in schools which has an impact on retention and quality of education. Learners require age-appropriate toilets, hand washing facilities, several clean and safe water points as well as a toilet-to-child ratio of 1:10. Nonetheless, it is notable that throughout the region, especially in basic education that schools have inadequate clean and safe running water points, have high toilet-to-child ratios and inadequate designated handwashing facilities. This continues to pose health risks and limit learning outcomes. In Tanzania, while most schools have toilets, only 32% of the schools have access to water[61].

- **Socio-cultural barriers continue to limit access to education: Child Early and Forced Marriages (CEFM), FGM, teenage pregnancies and gender-based violence impact access to education especially for female learners:** Notably, there are negative cultural beliefs about education of a girl child that frustrate efforts towards inclusion of as many girls in the education system. The incidence of early marriage and teenage pregnancies remains high in many countries of the region. Also, many States lack effective guiding frameworks on School-Related Gender-Based Violence (SRGBV). These continue to limit education outcomes, especially for female learners. In Kenya, for instance, there has been an increase in the incidence of teenage pregnancies, especially during the Covid-19 pandemic, which has limited education outcomes for girls. According to UNFPA, close to a quarter of a million adolescent girls in Kenya aged between 10 and 19 years became pregnant between July 2016 and June 2017. Also, female genital mutilation (especially in regions like Kajiado, Samburu, and Narok), early marriages, traditional practices such as preference for the boy's than the girl's education, and gender-based labour division, are understood to significantly limit girl child school performance[62].

- **Conflict and Insecurity: Insecurity continues to limit children from accessing education, especially in States in the region with active conflict, post-conflict and elements of fragility.** In South Sudan, attacks against schools have been noted since the outbreak of conflict in December 2013. Insecurity, school closure, and conflict have been argued by stakeholders as significant limitations to access to education in the country. As a result of the conflict, schools have also been occupied by both fighting forces and IDPs. There is also recruitment of children into armed forces and armed groups especially due to increased vulnerability resulting from a lack of alternative livelihoods and education opportunities. In Somalia, education facilities, personnel and children face numerous risks related to violence and attacks due to the context of conflict and State fragility. Based on a 2016 Rapid Baseline Survey supported by UNICEF, the incidence and frequency of threats or attacks against primary schools remain high[63]. This manifests in violence against children in schools or on the

59 Republic of Rwanda. Educational Management Information Systems. Unesco. https://emis.uis.unesco.org/rwanda/

60 The Republic of South Sudan (2017). The General Education Strategic Plan, 2017-2020. Ministry of General Education and Instruction. https://docs.google.com/document/d/1EP1sNzjgGhTCv-O9dmtut5t39lGi0DIBnDbQ4Vy6v5o/edit

61 The United Republic of Tanzania, Ministry of Education, Science & Technology (2019). Education Sector Performance Report (2018/19). https://www.globalpartnership.org/sites/default/files/document/file/2020-05-Tanzania%20Mainland-ESP-IR_0.pdf

62 United Nations Population Fund (2016). Kenya Annual Report. https://kenya.unfpa.org/sites/default/files/pub-pdf/UNFPA%20Kenya%20Annual%20Report%202016.pdf

63 UNICEF (2016). Rapid Baseline Survey. https://www.unicef.org/somalia/media/1201/file/Somalia-Education-sector-analysis-2012-16.pdf

way to school, gender-based violence against girls, narratives of hate or divisiveness perpetuated in education curriculum, and communal forms of violence. Also, child recruitment, compulsory military training, segregation of boys' and girls' classes and concerns over attacks on education institutions are rampant in some regions, especially Central South.

- **Mechanisms for monitoring the sector appear weak**. In many states in the region, mechanisms and tools for monitoring progress remain weak. This poses a major risk to the provision of equitable access to relevant, quality education. Existing mechanisms appear unable to effectively track progress, especially linked to quality and relevance. Data capturing tools do not sufficiently disaggregate information to allow for the measurement of key indicators to better target and fund interventions.

- **Decentralisation challenges and inefficiencies in terms of education sector management impact performance and outcomes.** In some countries, like Zambia and Rwanda where there is substantive decentralisation of the education function, there are notable challenges in terms of management that remit inefficiencies with profound implications on access, quality and equity of education. For instance, decentralisation process in Rwanda has devolved greater levels of accountability and decision-making to districts and schools but there remains a need to strengthen governance and accountability at district and school levels, and to improve school management and inspection. Also, there is inadequate coordination between ESSP and district plans - many districts do not have a district education strategic plan, and within DDPs very few districts mention education beyond infrastructure. In Zambia, whilst the move towards decentralisation/devolution of education sector, through the Education Act of 2013, has contributed to improvement of the system there remain challenges in terms of the pace and depth of implementation of the dual system of devolution and de-concentration[64]. Local authorities lack sufficient capacity in terms of human resources, finances, and competencies to be effective.

- **Nutrition and health of learners:** Whilst there has been notable progress by governments in the region towards enhancing nutrition for all learners, a vast majority of learners still attend schools where meals (or some form of nutrition) are not provided. In many cases, school meals are not provided in areas where malnutrition is most critical. In some countries like Somalia and South Sudan, many secondary schools do not have school feeding programmes or school gardens. This has been attributed to access issues due to conflict, funding limitations and complementary community food and nutrition support provided by humanitarian agencies.

64 Republic of Zambia (2011). The Education Act. https://www.parliament.gov.zm/sites/default/files/documents/acts/Education%20Act%202011.pdf

SECTION FIVE: INVESTMENTS IN EDUCATION IN THE MEESA REGION

5.1 INTRODUCTION – BENCHMARKS AND COMMITMENTS TO EDUCATION

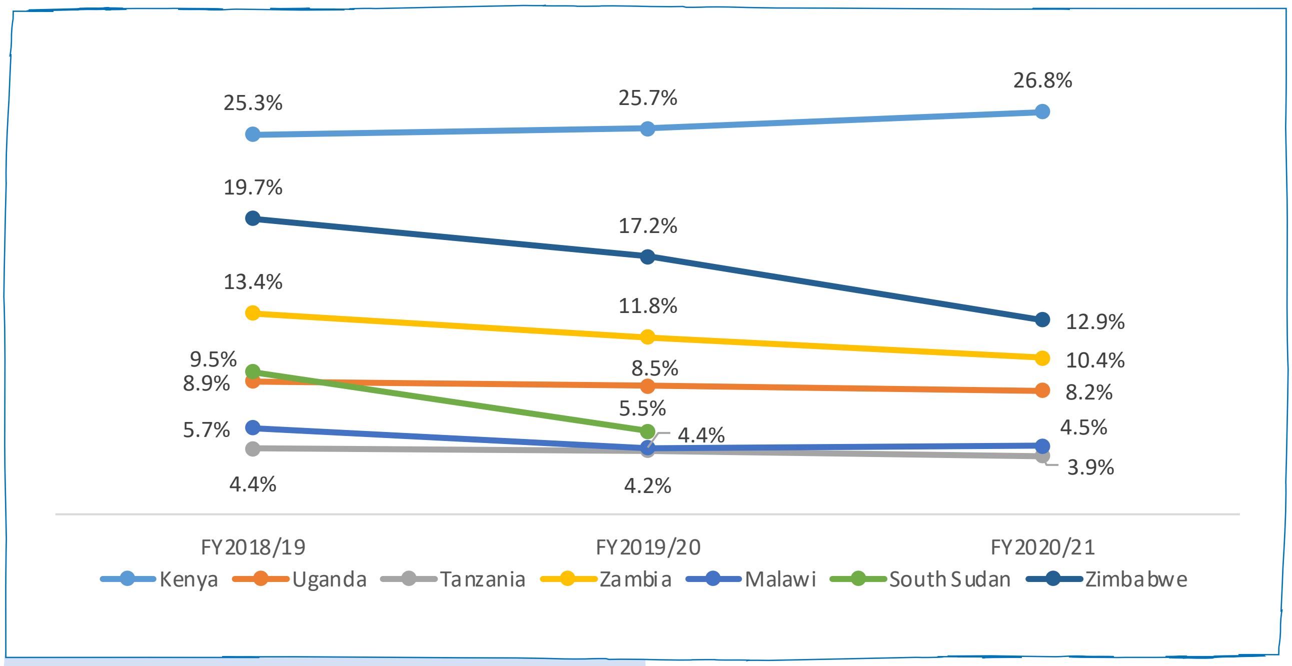
Beyond formulation of policies and committing to various international commitments and global benchmarks, governments demonstrate prioritization of education through increased investments and resource allocations to the sector. During the Global Partnership for Education (GEP) summit held in July 2021, governments committed to increasing annual expenditure on education to at least 20% of the total budget and 6% of GDP. This section explores the degree to which governments in the MEESA region have prioritized the education sector, specifically comparing allocation to education as a proportion of total budget and country GDPs in line with GPE summit commitments. It also explores the contribution of ODA to education across the region. Further, it explores investments in gender inclusion, disability inclusion and climate change education. Due to data limitations, the assessment focuses on seven countries in the region namely: Kenya, Uganda, Tanzania, Zambia, Malawi, South Sudan and Zimbabwe.

5.2 EDUCATION BUDGET AS A PROPORTION OF TOTAL ANNUAL BUDGET

The general outlook is that across most of the countries in the MEESA region, whilst the education sector receives large proportions of budgets, allocations to the sector are yet to meet the 20% budget threshold set during the GPE summit**.** As shown in figure 6 below, Kenya is the only country in the region whose allocations to the education sector have consistently exceeded the global benchmark of 20%. Between FY2018/19 and FY2020/21, Kenya's education budget accounted for more than a quarter of the annual budget and increased from 25.3% to 26.8% across the period under review. Among the countries reviewed, Zimbabwe appears to be closest to attaining the global benchmark – having allocated on average 16.2%

of the budget to education between FY2018/19 and FY2020/21. Most of the other countries fall far below the targeted 20% and some countries like South Sudan appear to acutely starve the education sector. In most jurisdictions, the lack of progress towards meeting the global benchmark is attributed to fairly narrow resource bases and tight macro-economic environments that impede revenue generation. It is however notable that to a large extent, investment in the sector is limited by inadequacies in public finance management; State fragility (in Somalia and South Sudan); corruption; and Illicit Financial Flows, especially for resource-rich countries like Zambia and Zimbabwe. These require urgent attention to assure sustainable funding for education.

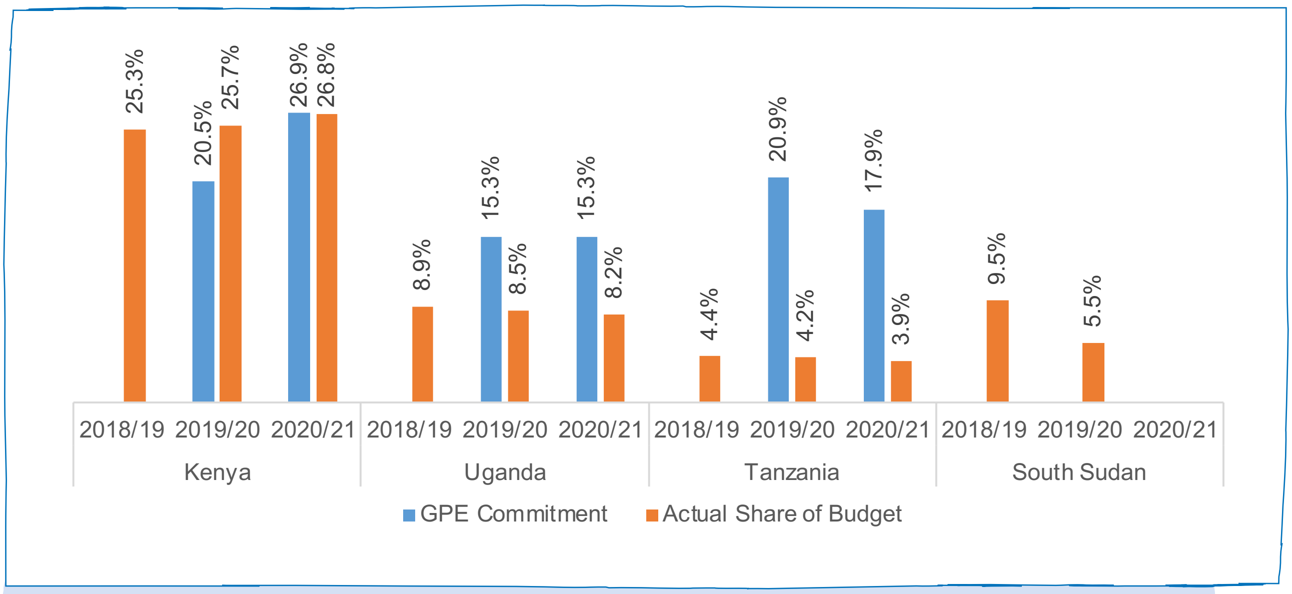
Figure 6: Education sector budget as a proportion of the total annual budget



Source: Acepis Computation based on National Budgets

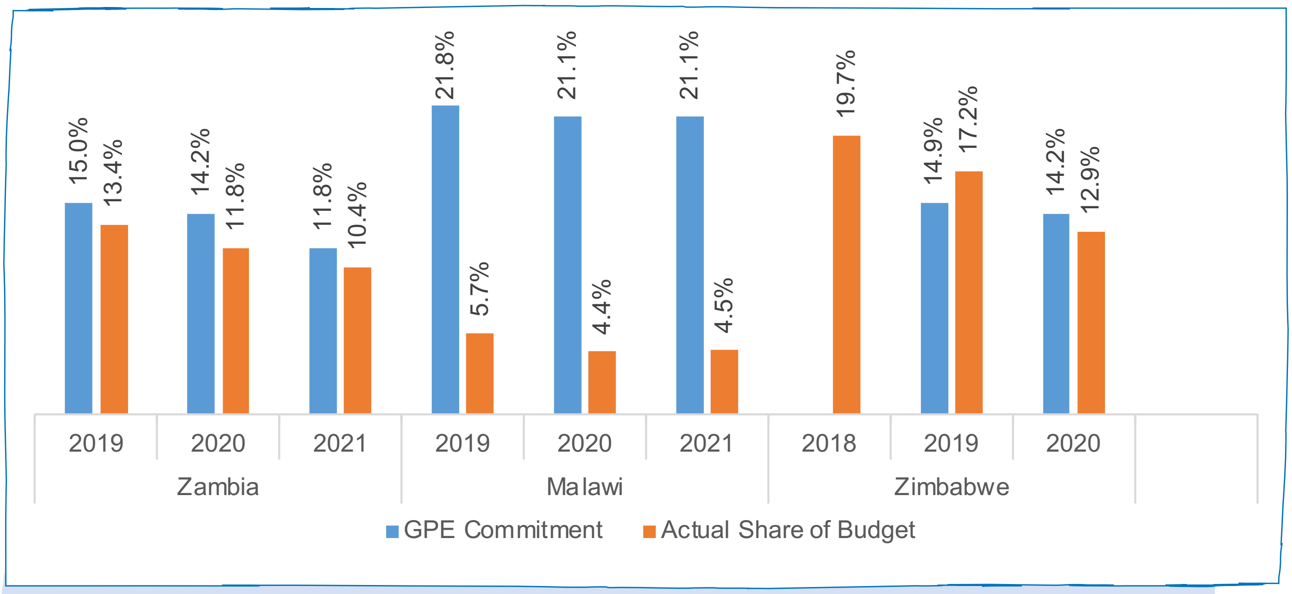
With regards to tracking expenditure commitments made during the GEP summit, it is notable that most countries within the MEESA region are yet to match their commitments, further demonstrating challenges in education prioritization and financing during the budgeting process. Figures 7 and 8 below compare the proportion of education sector budget within the overall budget to the yearly GPE commitments by government. Kenya and Zimbabwe are the only countries that matched or have a narrow margin with regards to meeting their yearly GPE commitments with regard to financing the education sector. Zambia has also made demonstrable efforts in attempts to match its allocations to education, at 13.4%, 11.8% and 10.4% against 15%, 14.2% and 11.8% targets in 2019, 2020 and 2021 respectively. The proportions, however, declined progressively across the three years. In Uganda, Tanzania and Malawi, the margins between GPE commitments and actual allocations to education are wide, signalling under prioritizations of education and limitations within the fiscal space that would allow for expanded allocations to education.

Figure 7: GEP Commitment vs Actual Budget Allocation to Education, Eastern Africa



Source: Acepis computation based on National Budget, Global Partnership for Education (GPE) Commitments

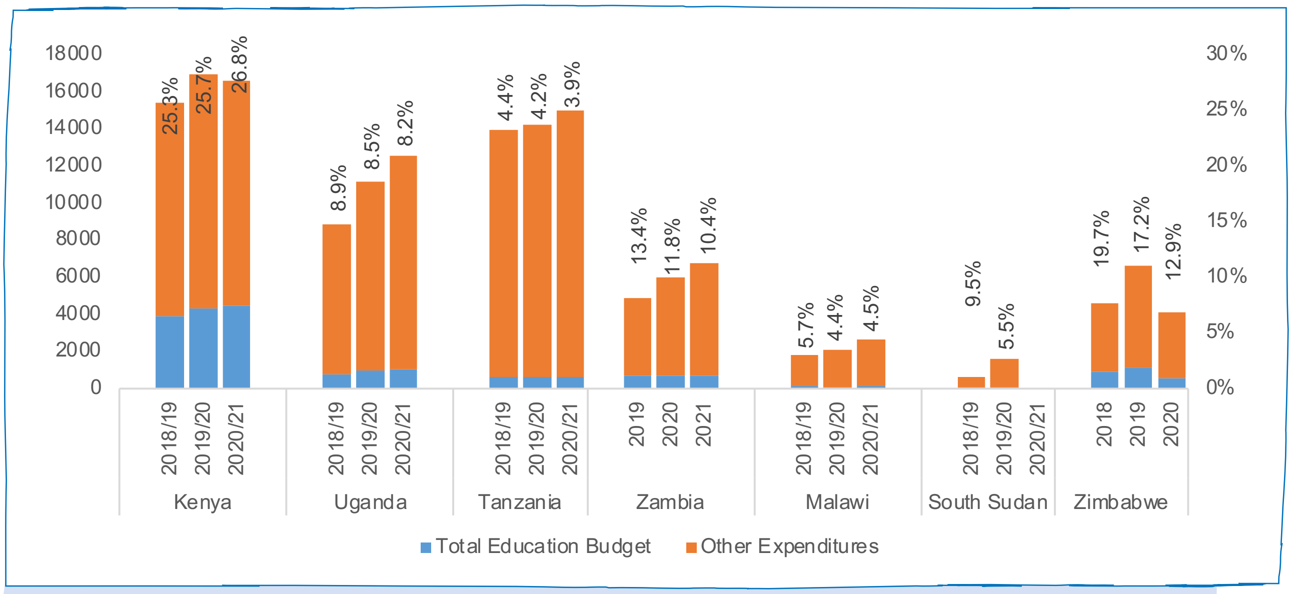
Figure 8: GEP Commitment vs Actual Budget Allocation to Education, Southern Africa



Source: Acepis computation based on National Budget, Global Partnership for Education (GPE) Commitments

Overall, there remains a substantive gap between current allocations to education and the target set during the GPE summit. Further, the proportion of education sector allocation against the total annual budget has largely declined across most countries as illustrated in Figure 9 below, despite the variances year-on-year being dismal – with the exceptions of Zambia and South Sudan which recorded sharper declines across the period. The decline in the proportions between FY2018/19 and FY2019/20 for Malawi was also steep. This suggests that education remains underfunded and under-prioritized within the MEESA region.

Figure 9: Education budget vs other expenditures in USD millions



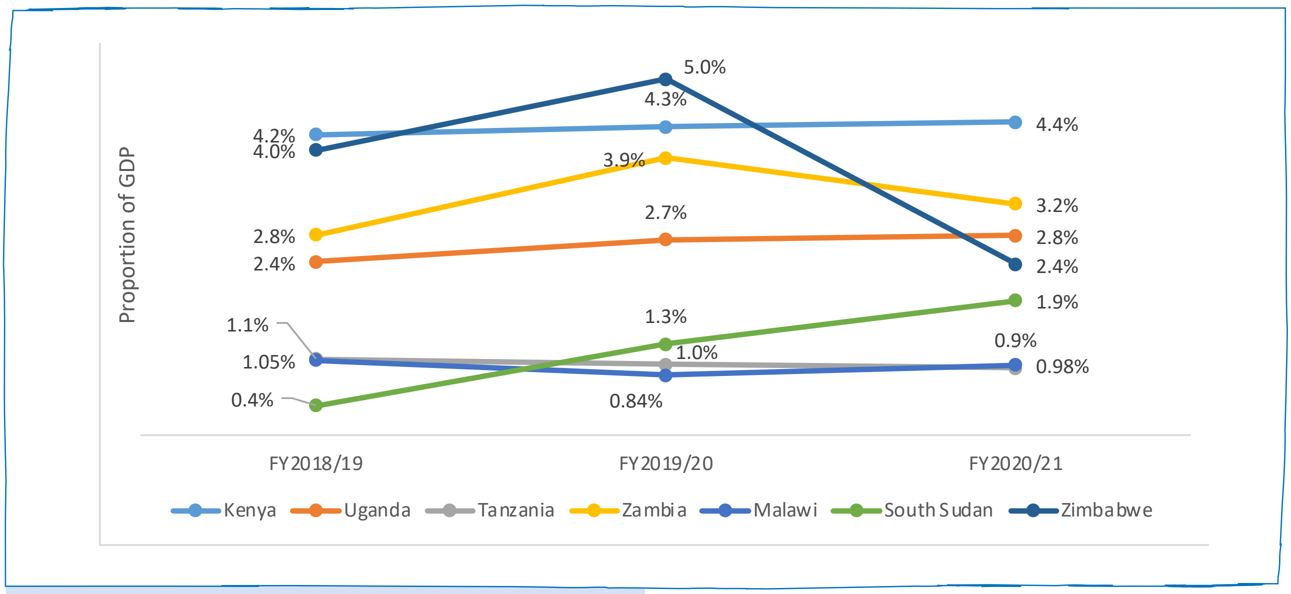
Source: Acepis Computation based on National Budgets

5.3 EDUCATION BUDGET AS A PROPORTION OF GDP

The other benchmark for financing education has been a target to allocate resources equivalent to at least 6% of GDP to the sector. Notably, no country in the region meets this target signalling that there remain significant gaps in education financing in the region. As illustrated in figure 10 below, it is in Kenya (allocating 4.3% between FY2018/19 and FY2020/21) where resources to the sector appear to be close to meeting the 6% benchmark. Zimbabwe's education spending as a proportion of the GDP was also averaged 4.5% between 2019 and 2019, with an increase from 4% to 5% over the duration. However, this declined sharply to 2.4% in 2020. Zambia and Uganda also recorded a net increase in the proportion of education sector budget as a proportion of the respective country GDP. In Uganda, the education budget as a share of GDP stood at 3.2% in FY2020/21, while for Zambia, the proportion was 2.8% in FY2020/21, up from 2.4% in FY2018/19. Sudan and Malawi had the lowest proportions of education sector budget as a share of GDP among the six countries sampled. It is however notable that in South Sudan, education budget as a share of the country's estimated GDP increased progressively from 0.4% and 1.3% in FY2018/19 and FY2019/20 to 1.9% in FY2020/21. This is a substantive improvement considering South Sudan is still grappling with the aftermath of decades of conflict and underdevelopment. Nonetheless, the proportion remains substantively low compared to the 6% global benchmark. In Malawi, education sector budget as a share of the GDP remains below 1%. This is despite the education sector being substantively underdeveloped and largely inaccessible in the country. In Zimbabwe, education sector budget falls below 1% of the country's GDP albeit increasing overall from 0.02% in 2018 and 2019 to 0.18% in 2020.

As in the proportion of allocations to education compared to total budget, lack of progress on this benchmark is attributed to narrow fiscal space occasioned by poor macroeconomic conditions in most of the countries. This has been exacerbated by the ensuing public debt problem in the region. Most of the countries are considered in debt distress of working with unfavourable public debt situations. This points to the need for advocacy and dialogue on sustainable macro-economic management in the region especially addressing public debt, illicit financial flows and corruption at national levels.

Figure 10: Education budget as a proportion of country GDP



Source: Acepis Computation based on National Budgets

OVERALL, A REVIEW OF BUDGET ALLOCATION TRENDS TO EDUCATION IN THE MEESA REGION REVEALS THAT:

Investments in the education sector within the MEESA region do not meet resource demands to address key gaps within the sector. Among the key gaps that cut across all countries in the region include underdeveloped education infrastructure, limited learning and teaching resources, human resources gaps (well trained and equipped teachers), limited progress in post-primary education – low transition rates to higher learning levels and inefficient administrative, monitoring and evaluation frameworks to oversee proper implementation of education sector plans. Static expenditure on education despite a general increase in annual budgets is a demonstration of limited prioritization of education in the region.

There are competing resource demands that limit prioritisation of the education sector across the MEESA region. The static public expenditure on education is indicative that governments in the region invest more in other sectors that compete with education in terms of prioritisation. For instance, due to State fragility in Somalia and South Sudan, insecurity remains a challenge which has led to prioritisation of security at the expense of social sectors like education and health. Uganda has substantively increased its investments in security, overtaking allocations to education. Between FY2018/19 and FY2019/20, allocations to security as a share of budget increased from 8.2% to 11.1%, while education declined from 11.1% to 10.3% over the same period.[65] Also, in other countries like Kenya where the government has assumed ambitious expansionist policy on infrastructure, a huge proportion of the budget goes into infrastructure at the expense of social sectors. Similarly, in Uganda, while Education ranks among the top sectors that command the largest share of the budget, investments in Public Works and Transport sector receive a considerably larger share of the budget. Further, across the board, the COVID-19 pandemic presented resource allocation dilemmas that contributed to a significant constriction on resources allocated to education. There were massive reallocations of budget to health across all countries. Tables 8 and 9 show the rank of education sector allocation in the budget and its proportion within the overall budget.

65 PWC, 2019. Industrialisation for job creation and shared prosperity: Uganda National Budget Bulletin 2019/20 https://www.pwc.com/ug/en/assets/pdf/budget-bulletin-19-2020-ug.pdf

Table 8: Level of Prioritization of Education in Budget Allocation, Eastern Africa (USD Million)

	KENYA			UGANDA			TANZANIA			SOUTH SUDAN	
	2018/19	2019/20	2020/21	2018/19	2019/20	2020/21	2018/19	2019/20	2020/21	2018/19	2019/20
Total Education Budget	3,892.2	4,354.2	4,444.9	786.2	951.3	1031.0	610.2	603.0	586.2	58.6	88.7
Other Expenditures	11,504.2	12,619.2	12,166.9	8,074.5	10,203.1	11519.8	13356.2	13,632.3	14,412.1	559.1	1,509.3
Share of Budget	25.3%	25.7%	26.8%	8.9%	8.5%	8.2%	4.4%	4.2%	3.9%	9.5%	5.5%
Rank in Budget Allocation	1	1	1	3	3	3	3	3	3	4	4

Source: Acepis computation based on National Budgets

Table 9: Level of Prioritization of Education in Budget Allocation, Southern Africa (USD Million)

	ZAMBIA			MALAWI			ZIMBABWE		
	2019	2020	2021	2018/19	2019/20	2020/21	2018	2019	2020
Total Education Budget	655.8	704.8	700.1	103.7	92.2	119.6	906.6	1132.3	530.3
Other Expenditures	4,235.3	5,267.2	6,038.9	1,701.4	1,983.8	2,508.4	3702.2	5,465.7	3,569.7
Share of Budget	13.4%	11.8%	10.4%	5.7%	4.4%	4.5%	19.7%	17.2%	12.9%
Rank in Budget Allocation	3	3	3	1	1	1	1	2	2

Source: Acepis computation based on National Budgets

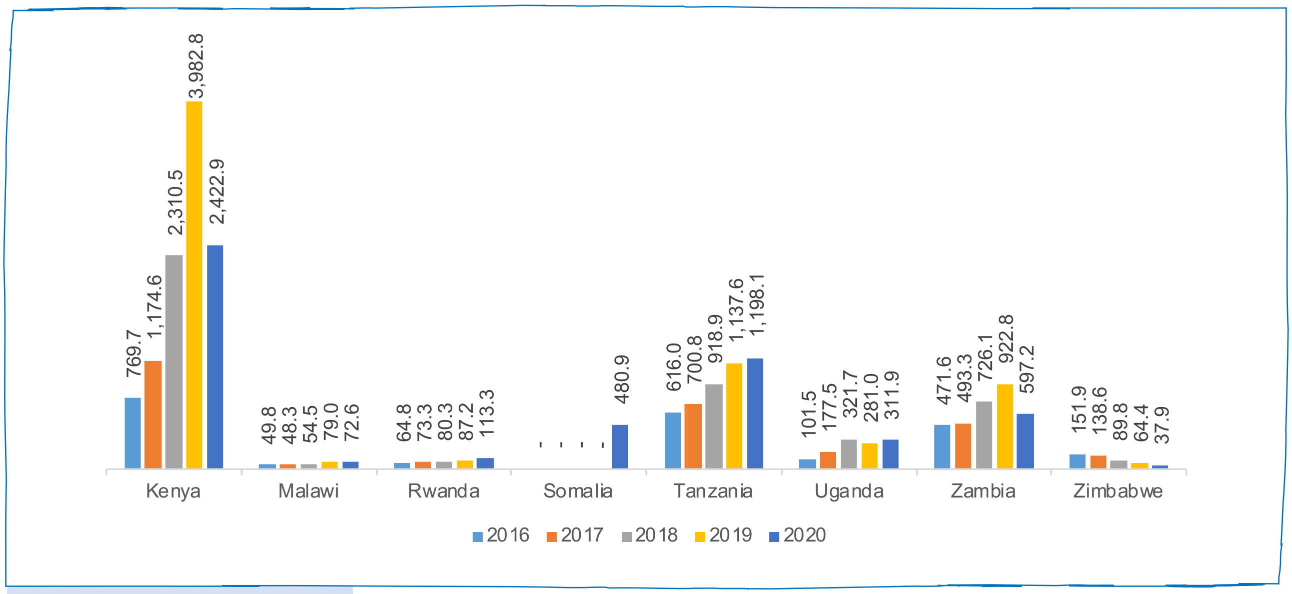
The shrinking fiscal space due to rising public debt and vulnerabilities to external economic shocks continue to limit investments in education. Many countries within the MEESA region have accumulated large amounts of public debt over the last decade. This situation was exacerbated by the pandemic - the pandemic sparked an accelerated accumulation of public debt across most counties in Eastern and Southern Africa.[66] The rise in public debt and the resulting repayment obligations continue to shrink the fiscal space in most countries within the MEESA region. Consequently, investments in critical social and pro-poor sectors such as education continue to shrink or stagnate, despite overall increase in annual budget. For instance, in Kenya, debt repayment obligations exceed the resources invested in education. In 2020, Tanzania spent USD 1.2 billion in repayment of external debt, representing a 94% increase or USD 582.1 million, from 2016. Similarly, Rwanda's external debt servicing cost increased from USD 64.8 million in 2016 to USD 113.8 million in 2020. In FY2020/21, Kenya spent Ksh780.6 billion, 6.9% of GDP, on debt servicing[67], compared to Ksh.445.3 million spent on education. Similar vulnerabilities and trends are evident across the region,

66 Muchabaiwa, B. L., 2021. The Looming Debt Crisis in Eastern and Southern Africa: What it Means for Social Sector Investments and Children. United Nations Children's Fund (UNICEF), Eastern and Southern Africa Regional Office (ESARO) https://www.unicef.org/esa/media/9636/file/UNICEF-ESARO-Looming-Debt-Crisis-2021.pdf

67 Government of Kenya, 2021. Annual Public Debt Report 2020/2021. The National Treasury and Planning. https://www.treasury.go.ke/wp-content/uploads/2021/12/ANNUAL-PUBLIC-DEBT-REPORT-2021-final-as-at-oct-21-2021.pdf

particularly in countries with substantive amounts of public debt. Overall, public expenditure trends show that debt service costs have increased substantively over the years for most countries. Figure 5 in section 2 highlights increases in total debt service costs as a proportion of the total budget across four countries in the MEESA region. Further, figure 11 below illustrates the total debt service cost on external debt, in absolute amounts, across 8 within the MEESA region between 2016 and 2020.

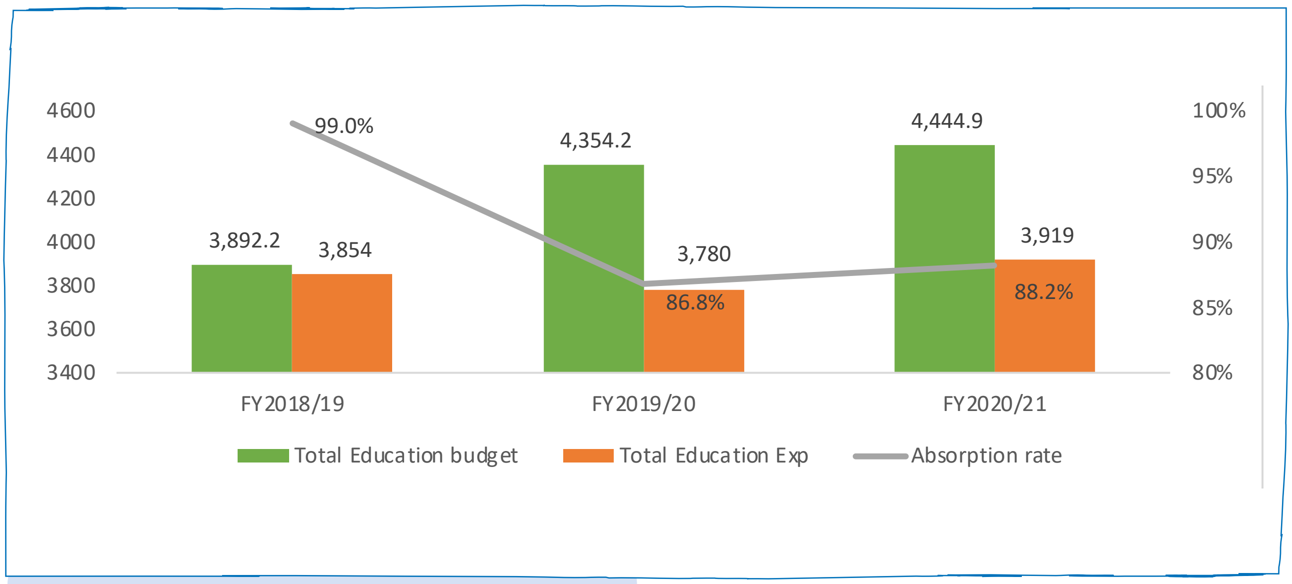
Figure 11: Debt Service on External Debt 2016 - 2020 (USD Millions)



Source: The World Bank

Across the region, whilst reporting on budget outturns for the education sector remains poor, governments fail to transfer budget as allocated which further limits resources for education. Different countries have adopted varying structures for reporting on their budget implementation. However, it is notable that, except for Kenya, most countries in the region do not provide a comprehensive report on the budget outturns. Consequently, it remains a challenge to determine the extent to which governments adhered to approved budget estimates and the justifications for the same. This points to the limited transparency with regards to management of public finances in the region, particularly the education budget. Nonetheless, where data is available, for instance in Kenya, there is a recurring trend of government transferring less than what is allocated to the sector. As illustrated in figure 12 below, there is a significant variance between allocations and expenditures. This is further complicated by budget absorption challenges that limit full utilisation of resources invested in the sector. Some of this is attributed to late disbursement of funds by the national treasury and other internal inefficiencies within the education sector – some remitted by devolution of ECDE.

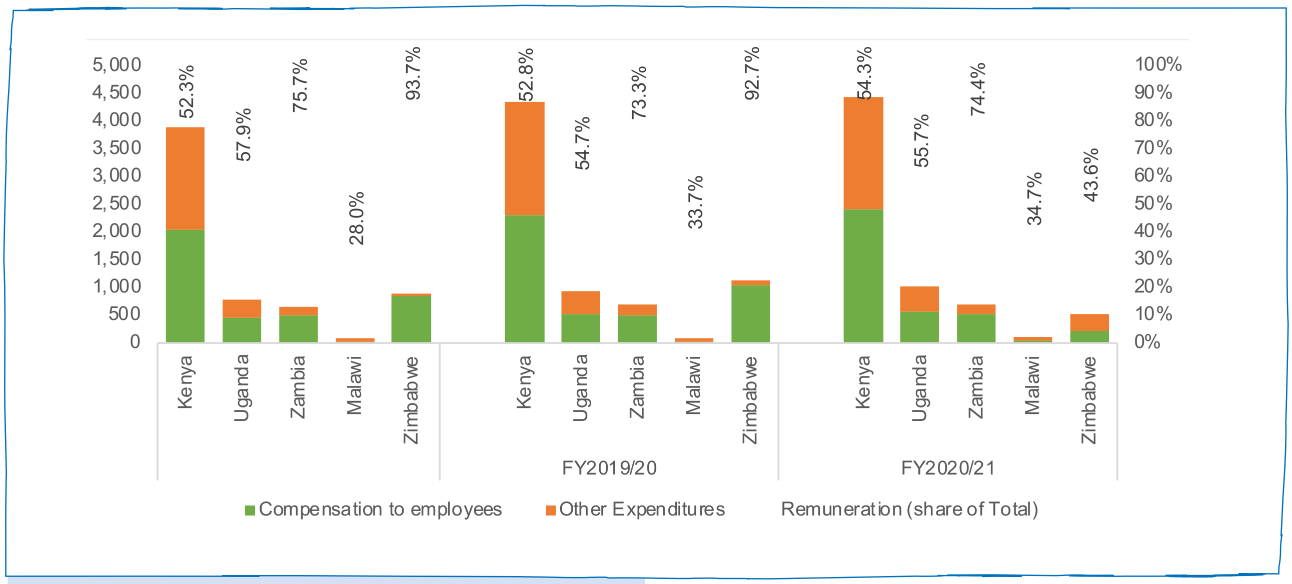
Figure 12: Education Sector Budget absorption in Kenya, in USD Millions



Source: Acepis Computation based on National Budgets

There is significant imbalance in terms of allocations to emoluments for human resources (teachers) compared to investments in other sector necessities like infrastructure, facilities, equipment and books. This may be impacting quality, access and equity. Notably, across most countries, with the exception of Malawi, more than half of the total education sector budget is allocated to compensation of employees – payment of salaries and allowances. Among the key challenges that characterize the education sector across all countries within the MEESA region are inadequate infrastructure and appropriate teaching and learning materials to facilitate the delivery of quality education. With a substantive proportion of the allocations to education going into compensation of employees as demonstrated below, limited resources are allocated for development and improvement of necessary school infrastructure, and provision of appropriate and sufficient learning resources to learners. It is also worth noting that the volume of investment in education remains substantively small across all countries, with the exception of Kenya. As such, whilst the proportion of the education sector allocation earmarked for compensation of employees consume the largest share of the budget, the resources remain insufficient to meet the human resource demands necessary, in term of teachers, to guarantee delivery of quality education.

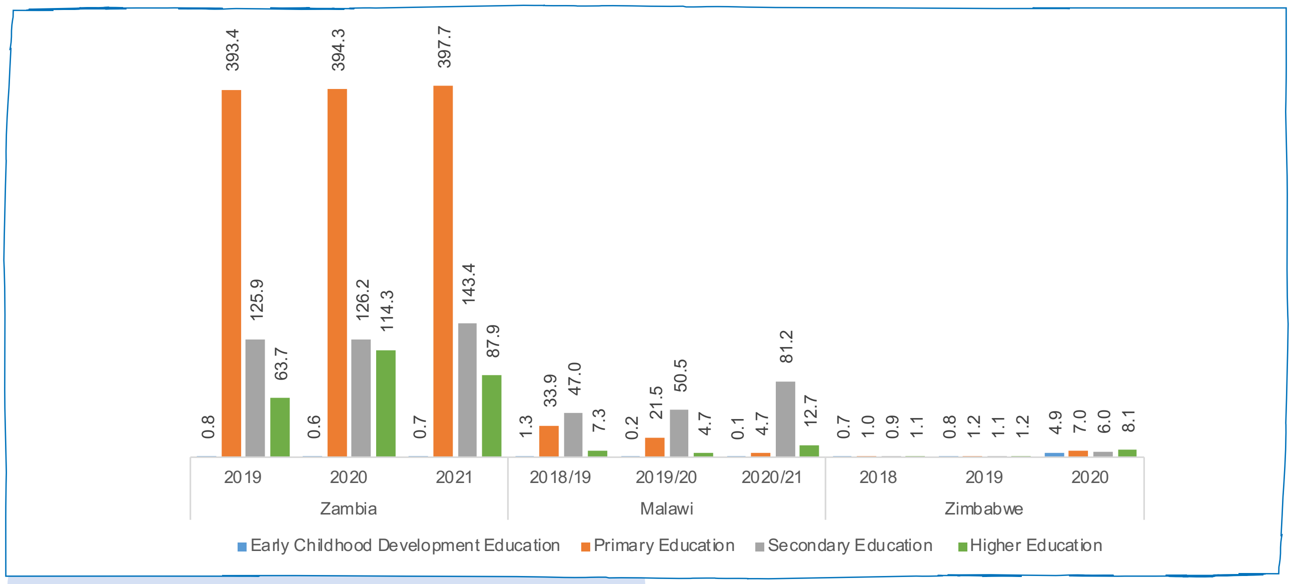
Figure 13: Proportion of Education Sector Budget going into Compensation of Employees (USD Millions)



Source: Acepis Computation based on National Budgets

Early Childhood Development Education remains under prioritized as evident from allocations to key programmes in education across all countries reviewed. In most countries, the budget for ECDE has been lumped up with the budget for primary education under basic education or general education as is the case for Tanzania, South Sudan and Uganda. In Kenya, ECDE was devolved to the county level, which means allocations vary year-on-year based on evolving priorities of county governments and ability to mobilize resources through own-source revenue and timely remittance of the equitable share of revenue by the National Treasury. Where allocations to ECDE were more elaborate as is the case for Zambia, Malawi and Zimbabwe, it was evident that more resources were channelled to primary and secondary education between FY2018/19 and FY2020/21 as demonstrated in figure 14 below. This is an indication of the gap in education sector financing, granted ECDE forms the foundation for education across higher levels of learning. The limited prioritization of ECDE may also form part of the variables impacting the transition rates at primary and secondary levels.

Figure 14: Allocations to ECDE in Zambia, Malawi and Zimbabwe (USD Millions)



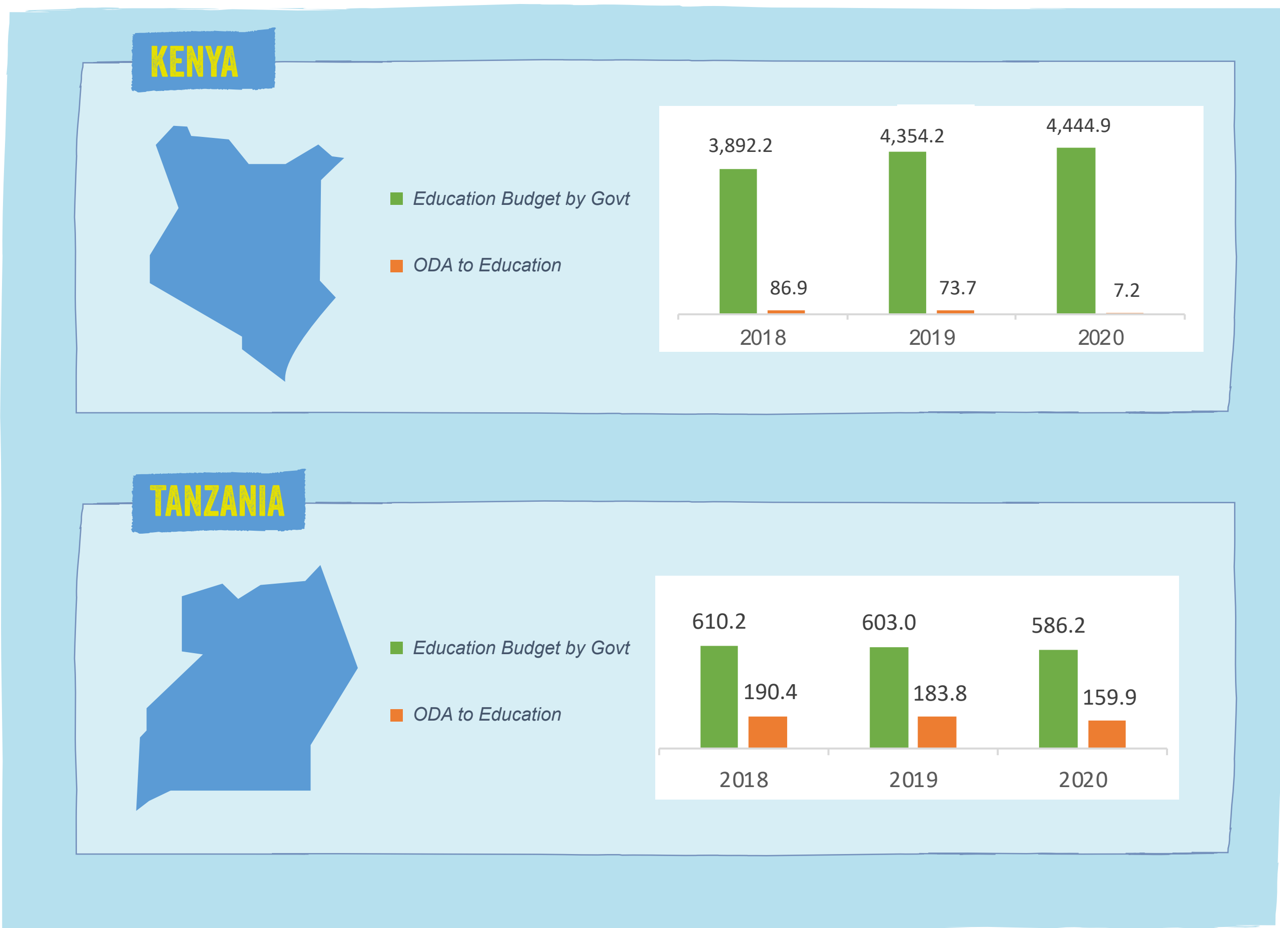
Source: Acepis Computation based on National Budgets

5.4 OFFICIAL DEVELOPMENT ASSISTANCE (ODA) AND EDUCATION FINANCING IN THE MEESA REGION

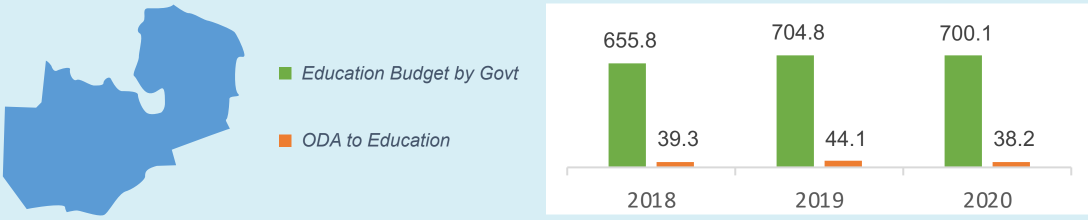
Foreign Aid and other forms of ODA have been integral in the realization of key development outcomes in Africa. Countries within the MEESA region have also benefited substantively from ODA over the years, with education being among the key sectors benefiting from resources availed by development partners through direct budget support or support for specific programmes and interventions in the sector.

- **Whilst ODA contributes substantively to financing education in the region, for most countries, it forms a small proportion of the basket of financing. However, there are situations, especially those encumbered by state fragility and resource constraints like Somalia, South Sudan, and Malawi, where the share of ODA in total education spending is significant.** This signals not only questions about sustainability but also about independence of the education systems in these countries. In Kenya, Uganda, Zambia and Zimbabwe, the education sector is largely financed by the government, with the ODA contribution being low, while in Malawi and South Sudan, the education sector is heavily dependent on ODA. As shown in figure 15 below, Kenya's education sector is the least reliant on ODA compared to other countries, with financing through the budget significantly exceeding the ODA channelled to the sector. This may be attributable to the advancement in economy for Kenya compared to the rest of the countries within the MEESA region, thus the increase capacity to support education sector programmes through budget allocations. However, in Malawi and South Sudan, ODA channelled to the education sector in 2018 exceeded budget allocations to the sector in 2018. In Malawi, USD 127.5 million and USD107.9 million were channelled to education through ODA in 2018 and 2019 respectively compared to USD103.7 million and USD92.2 million to education through the national budget over the same period. In South Sudan, ODA USD59.3 million was channelled to education in 2018 against USD58.6 million allocated through budget. Across all countries, the proportion of ODA to education declined in 2020 commensurate to the overall decline in total ODA to all sectors. The decline was largely attributable to the COVID-19 pandemic that resulted in the donor community expending less resources on development assistance compared to previous years. Overall, the narrow margin between investments in education via ODA and through the national budget is indicative of the extent to which education systems in Malawi and South Sudan are reliant on donor support.

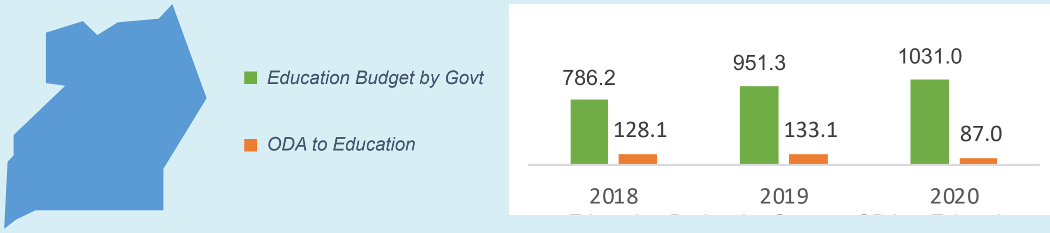
Figure 15: Government financing for education vs ODA financing, in USD Millions



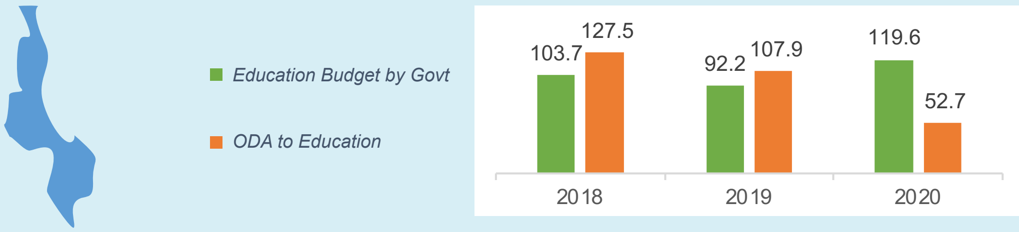
ZAMBIA



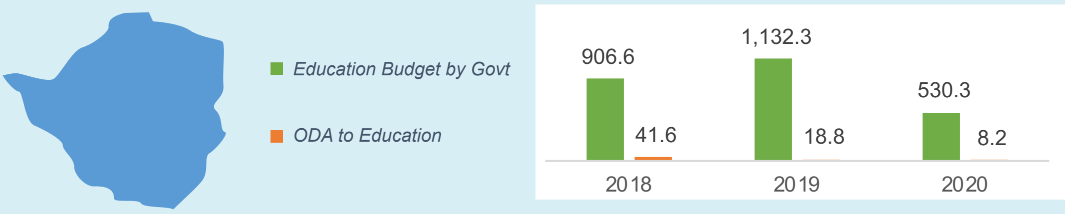
UGANDA

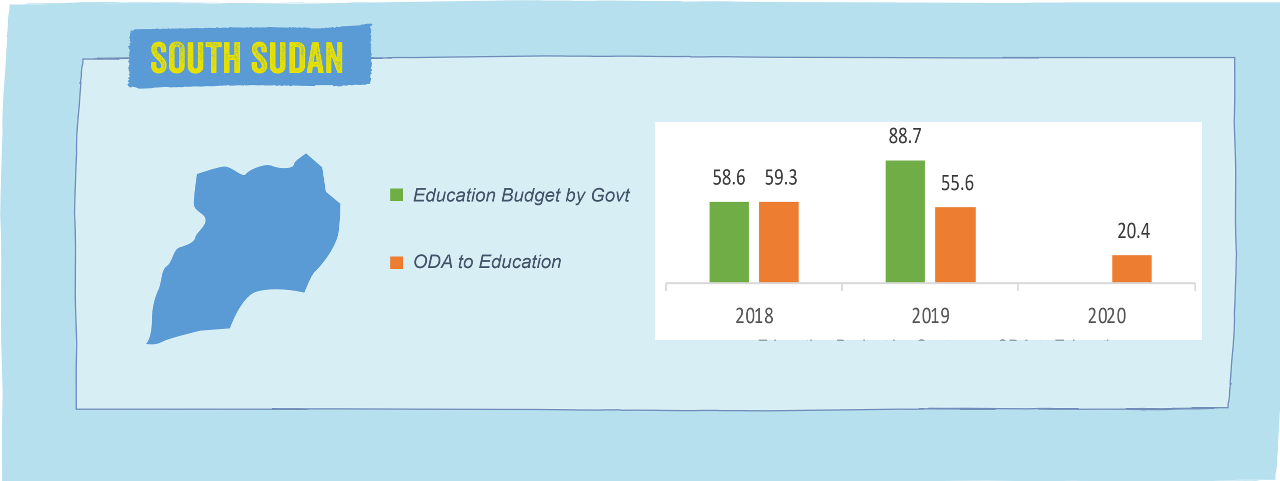


MALAWI



ZIMABWE

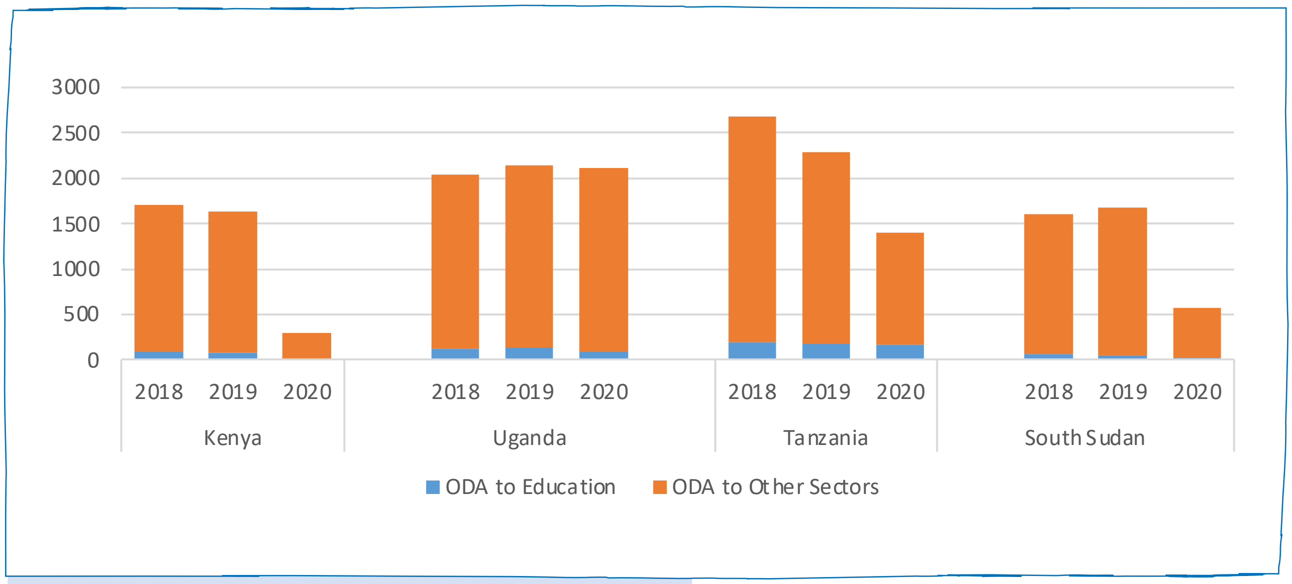




Source: Acepis Computation based on Data from OECD.Stat

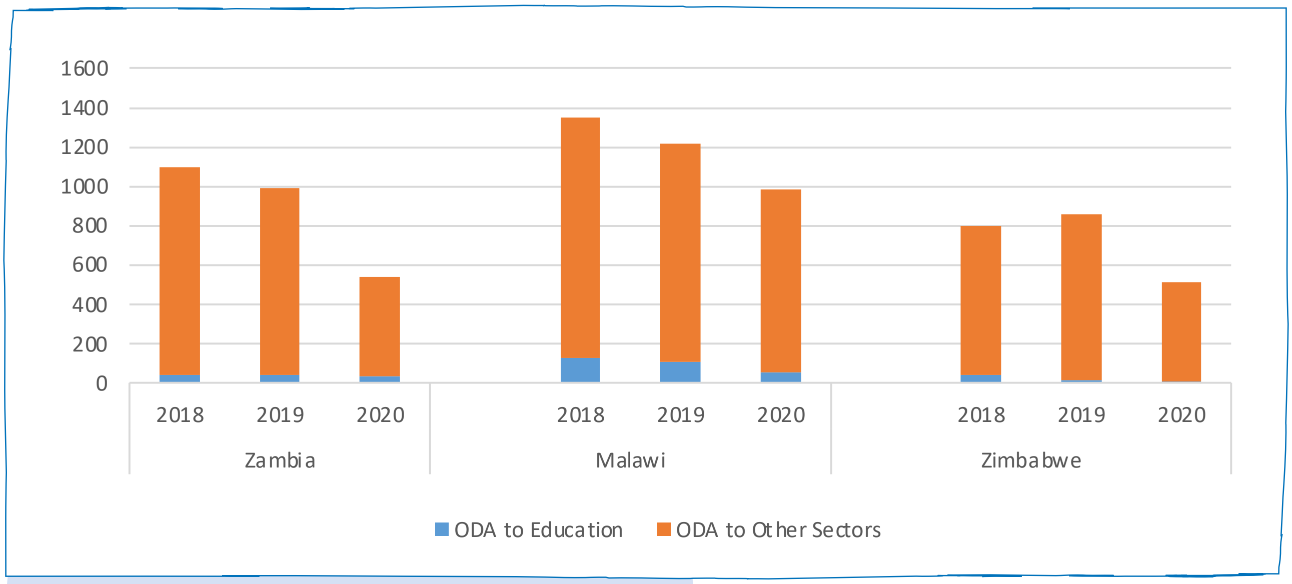
- **The education sector is not highly prioritised by development partners - a large proportion of ODA to the region is channelled to other sectors.** Such sectors in economic, infrastructure and services, production sectors, health and humanitarian programmes appear to receive the larger share of ODA. Figures 16 and 17 below compare total ODA to the education sector across the five countries sampled, against the total ODA received between 2018 and 2020. Overall, the proportion of ODA channelled to the education sector within the MEESA region is dismal and insufficient to meet key demands in the sector to guarantee learners equitable access to quality educational opportunities. This suggests that reliance on ODA is an unsustainable approach to financing the education sector, particularly for countries whose education sectors are substantively underdeveloped with regards to infrastructure, learning resources and human capacity. This points to the need for national governments in the region to increase focus and prioritisation of education - increase budget allocations to the sector. Nonetheless, there is also an opportunity for advocacy targeting development partners to channel more resources to education – especially for States dealing with humanitarian crises like Somalia and others with varying levels of State fragility that limit the fiscal space necessary for the government to invest domestic resources substantively in education.

Figure 16: ODA to Education Sector as a Share of Total ODA to Each Eastern Africa Countries, 2018-2020 (USD Millions)



Source: Acepis Computation based on Data from OECD.Stat

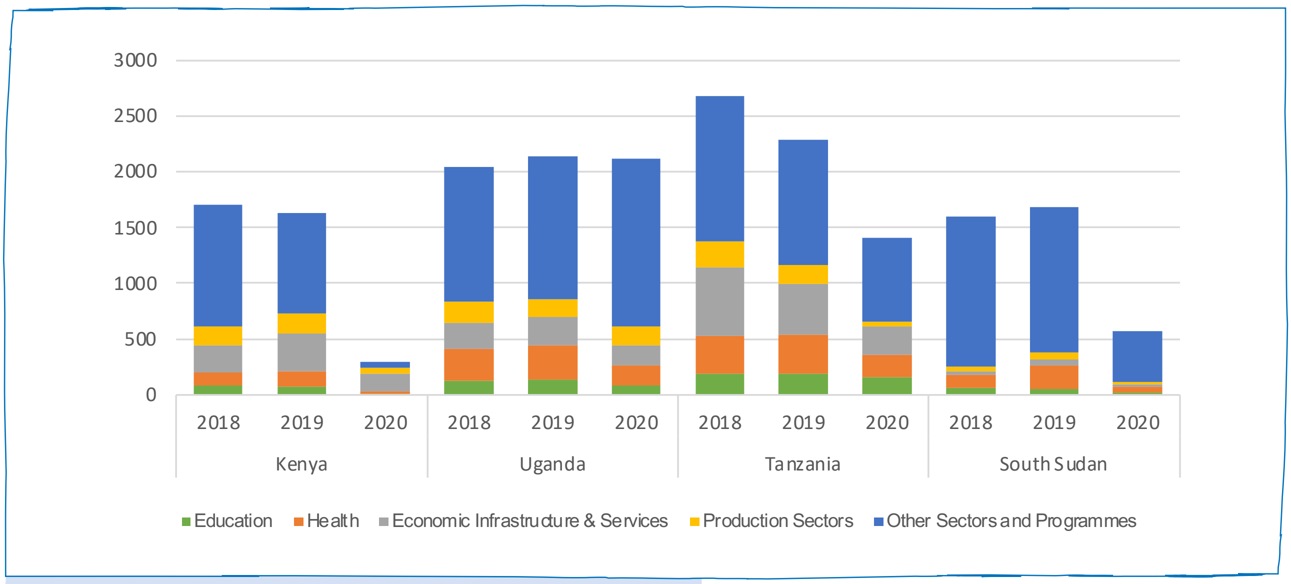
Figure 17: ODA to Education Sector as a Share of Total ODA to Each Southern Africa Country, 2018-2020 (USD Millions)



Source: Acepis Computation based on Data from OECD.Stat

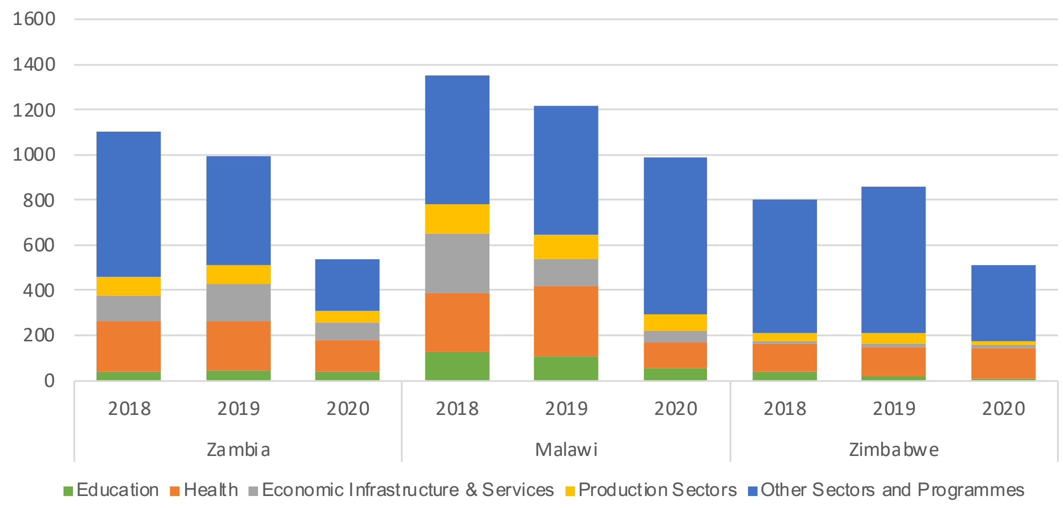
- **Compared to other sectors, the proportion of ODA going into supporting programmes in the education sector accounts for a small proportion of the total ODA to the respective countries**. As shown in figures 13 and 14 below, the proportion of ODA to sectors such as health and production sectors among others is greater than the proportion of ODA to education across all countries sampled. The ODA allocation to education sector programmes accounts for less than 10% of total ODA remitted to the respective countries as shown in figure 18 below. Further, it is notable that in Malawi, Uganda, South Sudan, Zimbabwe and Kenya, ODA to education as a share of total ODA received declined progressively between 2018 and 2020. In Malawi, the proportion declined from 9.4% to 5.3%. In Uganda, the proportion declined from 6.3% to 4.1% while in Kenya and Zimbabwe, the proportion declined from 5.1% to 2.4% and 5.2% to 1.6% respectively. In South Sudan, the proportion also declined overall, albeit dismally, from 3.7% in 2018 to 3.6% in 2019.

Figure 18: ODA to Education vs other sectors for Eastern Africa Countries, 2018-2020 in USD millions



Source: Acepis Computation based on Data from OECD.Stat

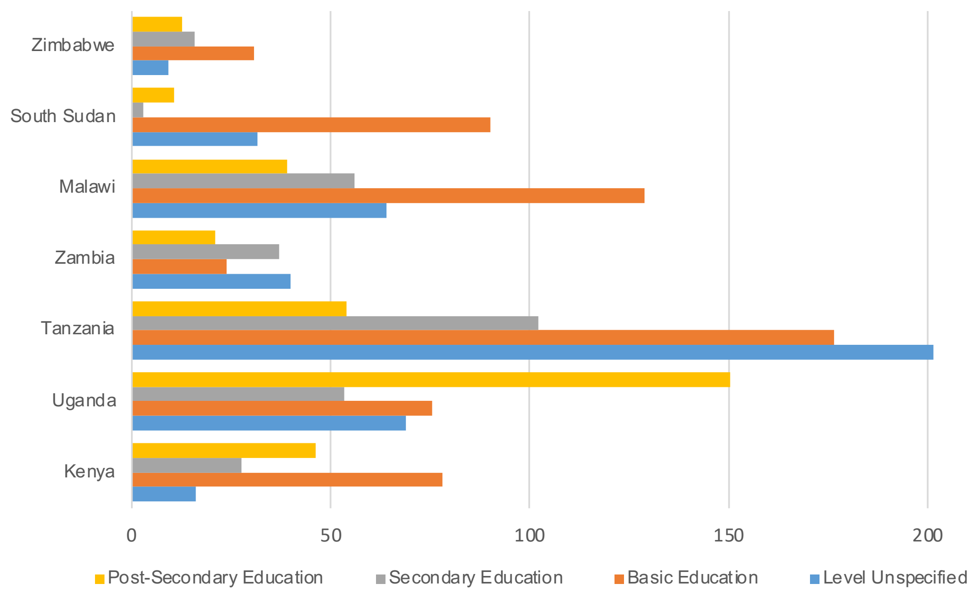
Figure 19: ODA to Education vs other sectors for Southern Africa Countries, 2018-2020 in USD millions



Source: Acepis Computation based on Data from OECD.Stat

- **ODA largely supports basic education and post-secondary education programmes. Considering limited budget investments, this points to significant gaps in resource investments to post-secondary education and ECDE which may be limiting achievement of targeted outcomes.** Cumulatively, USD 426.9 million of ODA was channelled to basic education programmes and USD280 million in post-secondary education in the six sampled countries between 2018 and 2020. A considerable proportion was also invested in supporting policy and administrative management, teacher training, education research and education facilities, at USD229.6 million across the three years. Figure 20 below highlights cumulative ODA to the key education sector programmes. This may be attributable to the fact that these programmes can be construed to be high impact considering the number of learners benefiting from the investments.

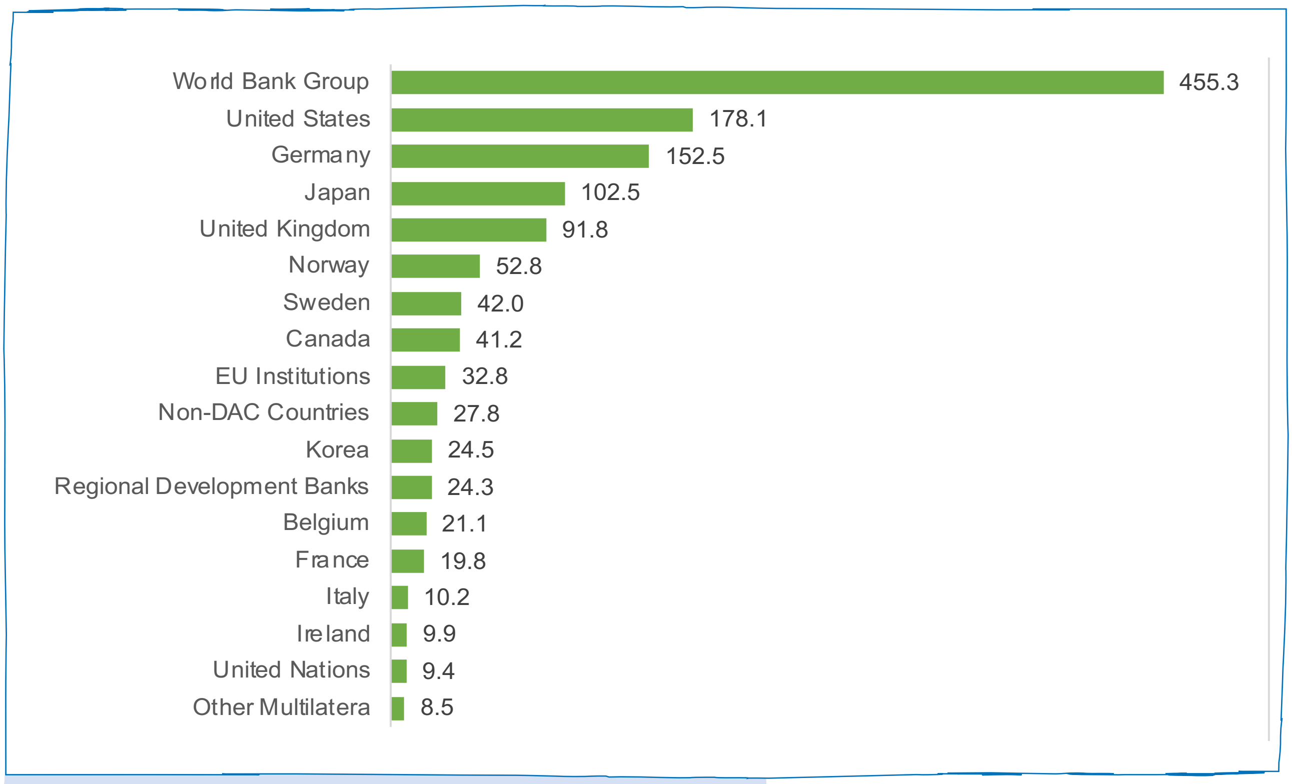
Figure 20: Cumulative ODA to core education sector programmes in USD millions 2018-2020



Source: Acepis Computation based on Data from OECD.Stat

- **The World Bank, The United States and Germany are the top three largest financiers for education in the MEESA region.** In 2019 and 2020, the World Bank remitted USD 192.4 million and USD455.3 million in ODA to countries in the MEESA region. These resources were availed through budget support and direct funding for various projects and interventions in the education sector. Among the DAC countries, the United States, Germany and Japan are the largest financiers of education within the MEESA region having remitted USD 178.1, USD152.5 and USD102.4 million respectively in 2020. Non-DAC countries remitted USD 37.5 million and USD 27.8 million in 2019 and 2020 respectively. However, there exist variations with regards to the largest contributors per country. Nonetheless, individual contributions by the respective countries remain critical in addressing the gaps within the education sector, particularly in countries such as Malawi, Zimbabwe and South Sudan where there is a heavy reliance on the ODA component to finance education sector. Figure 21 below illustrates top ODA donors to MEESA countries in 2020.

Figure 21: Top ODA Contributors in 2020 to countries within the MEESA Region



Source: Acepis computation based on data from OECD.Stat[68]

- Overall, the trends in ODA channelled to education reveal a shift in prioritisation of education by development partners and the wider donor community with more attention accorded to other sectors. Whilst the decline may be attributable to prevalence of COVID-19 as the sharp declines were recorded in 2020 at the onset of the pandemic, these are further demonstrations of the enhanced vulnerability of the education sector to external shocks. This further demonstrates need for governments (especially in countries like South Sudan, Malawi and Zimbabwe) to prioritise domestic resource allocations to the education sector and wean off reliance on aid to support key education programmes.

68 Note: Non-DAC Countries refer to donor countries outside the Organisation for Economic Cooperation and Development (OECD)'s Development Assistance Committee (DAC) member group.

5.5 GENDER RESPONSIVENESS OF EDUCATION SECTOR BUDGETS

There has been considerable progress towards ensuring gender responsiveness in the education sector – both in terms of policy implementation and resource allocation. Across the region, States implement Constitutions, subordinate legislation and policies that buttress the right to education for both females and males. Additionally, governments have mainstreamed various programmes within the education sector and initiatives aimed at reducing barriers to education for females and attaining gender parity. For instance, Uganda implements a Gender Equality Seal certification programme that provides a mechanisms for ensuring women and men have equal opportunities. Further, during the budgeting process, budget circulars to government institutions, including the Ministry of Education, includes guidelines of engendering the budgets. In Kenya, the National Gender and Equality Commission developed guidelines for gender responsive budgeting applied through the budgeting process.[69] In Zambia, Gender Responsive Planning and Budgeting (GRPB) has been adopted to inform the budgeting process. Similarly, Zimbabwe also implements a gender budget call circulars as a means of mainstreaming gender in government programming, including in education. It is also notable that some countries such as Kenya, Uganda, and Malawi have made strides to make the budgeting process progressive by adopting Programme Based Budgeting. This approach to budgeting fosters accountability, transparency and data-driven decision-making.[70] As such, it is easier to track investments in ensuring the education sector is responsive to the needs of different genders, and to keep government accountable with regards to its utilization of resources. In Tanzania and Rwanda, performance-based budgeting approach informs allocations to various sectors, which have also realized some notable progress towards promoting gender equality.

Overall, whilst there still exists substantive gaps, there is demonstrable effort by governments within the MEESA region to ensure the budgeting process, including allocations to the education sector, is gendered. However, the different approaches to budgeting makes it difficult to conduct an exhaustive comparison across the region. Nonetheless, Table 4 in Section 3.4 highlights some of the policy instruments and institutional frameworks that exist across countries in the region that guide and aim to promote gender inclusivity in the education sector.

> Gender equity has been achieved at the basic level, both primary and secondary but there's diversity. There are imbalances at post-secondary school level because, at the universities, girls still constitute just 40% if not below of the entire population." – **KII, Media, Kenya**
>
> "There are a number of programs, some of which are financed by the government, some of which are supported by cooperating partners, but they've been quite sustained, for instance, we've got the Keeping Girls in School program which has been running for a number of years. Additionally, we have the GEWEL, which is the Girls' Education and Women's Empowerment and Livelihoods Program which targets women and tries to keep them and empower them in these schools." – **KII, CSO, Zambia**
>
> "There is so much government has done because the gender unit of the Ministry of Education has been so active and they work very closely with UNICEF, partners like World Vision and others, the Ministry of Gender, Labor and Social Development. A lot has been done to improve access for girls especially." **– KII, CSO, Uganda**

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69 NGEC (2014). Guidelines for Gender Responsive Budgeting (GRB) in Kenya. National Gender and Equality Commission https://www.ngeckenya.org/Downloads/NGEC-GRB-Guidelines-for-National-Govt-in-Kenya.pdf

70 Office of Budget and Evaluation, City of Philadelphia http://phlcouncil.com/wp-content/uploads/2017/03/Program-Based-Budgeting-In-Brief.pdf

Despite existence of policy and programmes, there remain challenges that continue to keep female learners out of school across the region. These include socio-cultural norms and practices like FGM and CEFM. Additionally, the prevalence of sexual gender-based violence continues to impact learners. Also, there are capacity limitations among teachers and administrators on gender-responsive pedagogy and on creating gender-sensitive environments in school. There is also a general lack of robust mechanisms for monitoring and evaluating progress towards promoting gender inclusivity in education.

Regarding responsiveness of education sector budgets to gender, States lack elaborate and efficient frameworks for financing programmes promoting gender parity in education. Nonetheless, it is possible to note specific budget vote heads and programmes that seek to address issues that limit gender equity in education. Some of the notable programmes/funded initiatives associated with ensuring gender responsiveness include: (i) delivering free primary and secondary education, (ii) re-entry policies for learners who previously dropped out of school due to pregnancies (like in Zambia and Zimbabwe), (iii) provision of free sanitary pads and other menstrual hygiene commodities (like in Kenya and Zimbabwe), (iv) capacity building of training of teachers to be more gender-responsive, (v) nutrition and school feeding programmes to keep children in school, (vi) improving WASH, and (vii) programmes addressing gender-based violence. Due to data limitations, especially lack of sufficient disaggregation of data and limited comparability – determining the size of proportion of budget that goes to gender is a challenge. Further, there is the tendency of several programmes that promote gender equality within the education sector and their associated budgets to be embedded within allocations to other government ministries and departments outside the ministry of education. This limits ability to aptly track utilisation and accounting for resources earmarked for promotion of gender inclusion.

In terms of the policies, the guidelines, the guidance on gender inclusion, on children with disability accessing education, all those is evident in the policy devolvement." – **KII, CSO, Uganda**

"Looking at the gender equality in education planning and implementation, I would say that we are at a good stage because even at the level of the ministry, we have someone in charge of gender monitoring in the education sector, and that's from the ministry to districts, from district to sectors, and from sectors to schools. Even gender is considered at all levels of decision-making." **– KII, CSO, Rwanda**

CASE STUDY 1:
GENDER RESPONSIVENESS OF EDUCATION SECTOR BUDGET IN KENYA

Within the MEESA region, Kenya is arguably the most progressive country with regards to attainment of gender parity in the education sector. Over the past decade, since the promulgation of the 2010 Constitution, the Government of Kenya has endeavoured to formulate and implement various legal, policy and institutional frameworks to ensure both male and female learners have equal access to educational opportunities, as demonstrated by the mainstreaming of policies, establishment of relevant institutional frameworks and allocation of resources to key programmes. Some of these legal and institutional frameworks include the 2013 Education and Training Sector Gender policy[71] which encompasses six thematic areas; Access, Equity, Quality of education, Safety, security and gender-based violence, Nurturing and mentoring and lastly governance and management, targets to eliminate all gender disparities and inequalities in education. Also, the introduction of Free Primary Education (FPE) in 2003 and free day secondary education (FDSE) in 2008. The Re-entry policy[72] allows for re-entry of learners who dropped out of school for various reasons to enhance access to education and promote retention, transition and completion. Further, the National Gender Equality Commission, an institutional framework that aims to reduce gender inequalities and discrimination against all. The National Adolescent Sexual and Reproductive Health Policy (2015)[73] which enhances SRH status of adolescents in Kenya and contributes towards the realization of their full potential in national development. Some of the aims of the policy include; reducing early and unintended pregnancies, reducing harmful traditional practices and addressing SRHR needs of marginalized and vulnerable adolescents.

An assessment of Kenya's education sector outcomes based on key sector indicators demonstrates that education is largely accessible to both male and female learners. The Gender Parity Index for Pre-Primary, Primary and Secondary students are 0.96, 0.97 and 0.95 respectively. Further, the transition rates from primary to secondary schools is high at 83.3%, indicative of the fact that most learners have a higher likelihood of transitioning to secondary schools in Kenya compared to other countries in the MEESA region.

In analysing budget allocations made in the education sector, table 10 below highlights some key programmes and interventions that have been made to enhance access to education opportunities and narrow the gender variance with regards to access to educational opportunities in the country. Some of which include free primary and secondary education, school health, nutrition and meals and alternative basic adult programmes among others. Despite the existence of these programmes, most of them are indirectly related to gender inclusion and as such there is need to introduce budget lines that directly address issues on gender inclusivity in the education sector.

Table 10: Education Sector Budget Allocations in Kenya's with elements promoting gender equality (USD Millions)

PROGRAMME/INTERVENTION	FY2018/2019	FY2019/2020	FY2020/2021
Free Primary Education	166.3	136.0	146.9
School Health, Nutrition and Meals	7.3	17.4	9.3
Early Child Development and Education	0.1	0.2	0.2
Primary Teachers Training and In-servicing	5.7	5.7	7.1
Secondary Teachers In-Service	1.9	1.8	1.7
Free Day Secondary Education	591.6	565.5	616.2
Expanding Education Opportunities in ASALs			0.4

71 Kenya Education Training Gender Policy 2013. Available at: https://planipolis.iiep.unesco.org/sites/default/files/ressources/kenya_education_training_gender_policy.pdf

72 National Guidelines for School Re-entry in Early Learning and Basic Education, 2020. https://www.popcouncil.org/uploads/pdfs/2020RH_NationalSchoolReEntryGuidelines.pdf

73 National Adolescent Sexual and Reproductive Health Policy 2015. Available at: https://www.popcouncil.org/uploads/pdfs/2015STEPUP_KenyaNationalAdolSRHPolicy.pdf

Aside from the programmes highlighted in table 6 above, the 2013 Education Training Gender Policy also defines some programmes and interventions for enhancing education opportunities for all. Key strategies highlighted in the policy include encouraging communities to provide mid-day meals to improve pupils' transition and retention and enhancing gender equity through grants, scholarships, loans and other awards. Outside the Ministry of Education, there also exist other programmes within other government departments and agencies, specifically the State Department of Gender and Gender and Equality Commission that target to improve education outcomes for women and girls. For instance, the State Department of Gender implements a programme providing sanitary pads to female learners and eradicating gender-based violence, female genital mutilation and other harmful cultural practices that have proven to limit access to education opportunities for female learners. Non-state actors such as donors, development partners, foundations, NGOs and CSOs in the country have also been instrumental in championing for gender equity in Kenya's education sector through provision of technical support, budget support and other programmes facilitated by CSOs.

The National Gender and Equality Commission also implements various programmes and interventions at national and county levels targeted at enhancing gender equality across all sectors and societal levels. In FY2018/19, FY2019/20 and FY2020/21, the State Department of Gender was allocated Ksh.4.97 billion, Ksh.4.49 billion and Ksh.3.35 billion respectively, while the National Gender and Equality Commission was allocated Ksh.0.91 billion, Ksh.0.49 billion and Ksh.0.43 billion respectively over the same period.
Whilst much progress has been realized, substantive gaps remain with regards to attainment of gender parity in education. An overall assessment of gender responsiveness of education sector in Kenya, and specifically the education sector budget highlights that there has been progressive increase in allocations to programmes that have direct implications on attainment of gender parity in education. However, beyond the mainstream programmes within the education sector as highlighted in table 6 above, the frameworks for financing and allocating resources to other programmes such as provision of sanitary pads to female learners, sensitization and capacity enhancement of teachers to respond to needs of males and females, and other related programmes remain disjointed.

5.6 RESPONSIVENESS OF EDUCATION SECTOR BUDGETS TO DISABILITY INCLUSION

The general outlook is that many states in the region have made effort towards increasing disability inclusion in education – through the enactment of policies that recognise rights and endeavour to provide opportunity for learners with disability though a lot of effort in terms of resources and policy implementation is still necessary. Most of the countries in the region (all except South Sudan have ratified the UN Convention on the Rights of Persons with Disabilities). There are notable national level policies and laws that guide implementation of initiatives to address rights of people with disabilities. Though still limited, there are notable resource allocations targeting learners with disability in several budgets across the region. Due to data non-comparability, differences in policy architecture, budgeting frameworks, conducting country comparisons on the level of disability inclusion against set benchmarks is a challenge. Nonetheless, the general observation when assessing responsiveness of the education sector in MEESA Region to disability inclusion is that:

- **Across the region, policies have been enacted and institutions set up tasked to ensure disability inclusion in the education sector.** Many countries have developed departments within the Education Ministries that are tasked with ensuring the well-being of learners with special needs. All the countries under study - with the exception of Somalia and Egypt - have national policies that inform delivery of special needs and inclusive education. Table 4 in section 3.4 highlights key policies on disability inclusion across different countries within the MEESA region.

> "So far, we have adopted the policy on people with disability-related to education that was adopted in 2017."
> **– KII, CSO, Rwanda**
>
> "Within the setup of the ministry, we have a directorate, what we are calling Inclusive Education Directorate, which takes into account those issues. At the same time, within the policy framework, we have the National Education Policy; there is a section on inclusive education. We have an Inclusive Education Strategy that we have been implementing for the past five years." **– KII, Government, Malawi**

- **Frameworks for monitoring and evaluation, and maintaining robust data for monitoring learning outcomes for disabled learners remain largely underdeveloped:** Many countries in the region are yet to establish sufficient mechanism for collecting and aggregating accurate information on learners with special needs. The lack of such vital data, which is needed for planning inhibits the costing for learners during budgeting and potentially leads to insufficient allocation of funds and inhibits performance measurement.
- **Countries in the region lack specific guidelines on budgeting for learners with disabilities:** Specifications that warrant and guide the process of allocation of funds e.g. number of learners with specified type of disability, requirements for modification of school equipment to be responsive to learners with disability among others consideration are unavailable. Allocations to such critical aspects for mainstreaming disability inclusion in education such as training of teachers and development of suitable learning material are insufficient and often remain embedded within larger allocations to associated programmes. Additionally, provisions for critical infrastructure development, provision of relevant and up-to-date learning materials for different categories of learners with disability, and continuous review and updating of curricula for disabled learners are narrow and limited. This has ensured that inclusive education receives inadequate funds across the MEESA region which further limits the quality of education accorded to this category of learners.

- **There is inadequate inclusion of views of persons with disabilities during processes for budgeting and allocation of resources in the education sector.** Across most of the countries in the region, mechanisms for ensuring the inclusion of voices and views of PWDs during the process of allocation of funds for special and inclusive education are largely insufficient and limit effective participation of concerned stakeholders. As such, the needs of learners with disabilities are not adequately reflected and addressed during the budget-making process leading to inadequate funding for special and inclusive education.

CASE STUDY 2:
DISABILITY RESPONSIVENESS OF THE EDUCATION SECTOR BUDGET IN UGANDA

A review of existing policies on disability inclusion within the education sector in Uganda demonstrates that while there have been efforts to increase learning opportunities and facilities accessible to the PWDs, the issue is not prioritised and effectively reflected in the existing education sector structures. Specifically, while there exist programmes in the education sector targeting learners with Special Needs, the framework for funding SNE remains underdeveloped and limits outcomes. Nonetheless, there are notable budget lines for delivery of special needs education and related services in Uganda. The table below presents the key components in the budget related to enhancing access to educational opportunities for disabled learners.

Table 11: Budget provisions for disability inclusion in the Ugandan education sector, in USD millions

PROGRAMME	2018/19	2019/20	2020/21
NATIONAL GOVERNMENT			
Special Needs Education	1.0	0.7	1.3
NATIONAL CURRICULUM DEVELOPMENT CENTRE			
Curriculum and Instructional Materials Development, Orientation & Research	2.0	4.0	11.3
KAMPALA CITY AUTHORITY			
Education and Social Services	11.5	12.6	13.3
TOTAL	**14.4**	**17.3**	**25.8**

Additionally, In FY2018/19, the Uganda government approved a USD 9.94 million budget for disability and elderly under the social protection for vulnerable groups programme in the Ministry of Gender, Labour and Social Development. Within the Education sector budget, USD 0.95 million was allocated to special needs education in FY2018/19, USD 0.74 million in FY2019/20 and USD 1.29 million in FY2020/21. Regarding utilisation of the approved budget for special needs within the education sector, the ministry spent USD 0.84 million of the approved budget in FY2018/19, USD 1.57 million in FY2019/20 and USD 0.98 million in FY2020/21.

CASE STUDY 3:
DISABILITY RESPONSIVENESS OF THE EDUCATION SECTOR BUDGET IN ZAMBIA

The existing policy frameworks in Zambia's education sector demonstrates conscious efforts by the government to cater to needs of learners with special needs. The law provides for equal access to education opportunities for all persons, including learners with disabilities and special needs. Further, there exist guidelines and frameworks informing the establishment of relevant infrastructure and the training of teachers to facilitate effective learning for learners with disabilities and special needs.

Beyond the established policies and programs, the government of Zambia provides funding for programs on inclusive education. There exist allocations for disability affairs within the budget such as development of material for learners and building capacity of teachers in special needs education. However, it is only in 2021 that there is specification of the funds apportioned to each program and level of education. Allocations related to SNE in the budget in 2021 are highlighted in the table below.

Table 12: Budget Provisions with Components of Disability Inclusion in Zambia (USD Millions)

YEAR	2019	2020	2021
MINISTRY OF GENERAL EDUCATION			
EARLY CHILDHOOD EDUCATION			
Curriculum and Materials Development	0	0	0.01
Teacher Education and Specialized Services	0	0	0.03
PRIMARY EDUCATION			
Curriculum and Materials Development	0	0	0.26
Teacher Education and Specialised Services	0	0	0.01
SECONDARY EDUCATION			
Curriculum and Materials Development	0	0	0.03
Teacher Education and Specialized Services	0	0	0.02
MINISTRY OF COMMUNITY DEVELOPMENT AND SOCIAL SERVICES			
SOCIAL WELFARE PROGRAMME			
Disability Affairs	1.57	1.35	1.21

Further provisions and allocations for persons with disabilities are covered under the Social Welfare programme by the Ministry of Community Development and Social Services. The programme was allocated USD1.67 million, USD1.35 million and USD1.22 million in 2019, 2020 and 2021 respectively. However, it remains unclear the proportion of these amounts that were channelled to cater specifically to enhancing learning opportunities and experiences for disabled learners and those with special needs. Further, it is notable that allocations have declined progressively across the three years, demonstrating limited prioritisation and inclusion of persons with disabilities in the budgetary process.

Zambia has policy provisions for development and equipping of institutions with assistive material, review of curriculum to incorporate the needs of learners with disability and upskilling teachers on inclusive education. However, there are no guidelines on costing for these provisions. Moreover, there is no clarity on the proportion of funds allocated to improve learning opportunities for learners with disability and special needs. The funds allocated to the programs have also been declining since 2019. Negative attitudes toward disability still affect inclusive education and even though teachers are trained, inclusive education is yet to be a reality in the classrooms pointing to the need for more capacity development in inclusive education approaches.

5.7 INVESTMENTS IN CLIMATE CHANGE EDUCATION WITHIN THE MEESA REGION

The implications of climate change are increasingly manifesting in Africa. Such incidences as extreme droughts, flooding and unpredictable weather patterns have become frequent, with most countries, particularly Zimbabwe, Somalia and South Sudan, experiencing extreme conditions. There are indications that populations are significantly vulnerable to climate shocks. In recognition of the imminent threat to development of the region, governments have consciously made efforts to address climate change issues, including direct investments in climate change mitigation and action. A critical component of the response is delivering climate change education.

Within the region, governments have instituted various policy instruments and plans that seek to mainstream climate change education, including embedding its components into the existing curriculum and education system. Substantive progress has been realized with regards to mainstreaming components of climate change education, and in other instances, environmental education into the curriculum. Across most countries, education sector strategic plans and other associated policy frameworks and guidelines appreciate the need for leveraging the delivery of climate change education to address the imminent threat of climate change. These include plans for action through specific programmes such as awareness creation, tree planting activities, and use of mainstream media and research, among others.

> "If you look into the national policy on education, and even when you look at the overall vision of the current government, they are so keen about issues to do with environmental sustainability, of which climate change, adaptation, and action are very principle and that's why they even introduced a new Ministry of Green Economy and Environment." – **KII, Academia, Zambia**
>
> "In Kenya first, Kenya has done a good amount of work in just trying to spread the word, incorporating the curriculum. Even with the current CBC, you will see a lot of tree planting initiatives happening in the schools and encouraging a lot of that to translate back into the family units, people doing this at home, and in other forums that are encouraged by just the learning from what the new curriculum has been encouraging across." – **KII, CSO, Kenya**
>
> "Our curriculum and programs at the higher level have in-cooperated the issues of climate change, but the curriculum is supposed to be reviewed once in a while. For primary curriculum, it's supposed to be reviewed every eight years, while the secondary curriculum is supposed to be reviewed every four years. Shortly, the ministry will be reviewing its curriculum to take into account emerging issues, including Malawi 2063, which is relatively new." **– KII, Government, Malawi**

It is however notable that in most countries, there exist no defined framework for financing climate change education. Governments' appreciation of need to deliver climate change education has largely been limited to policy formulation, with financing for climate change education programmes being limited. This may be attributable to the absence of a robust and clearly defined framework for funding such programmes. Instead, elements of climate change education and environmental conservation efforts are scattered across various government programmes, and scattered across MDAs. For instance, whilst integration of climate change education content into the curriculum is largely guided by the agencies responsible for curriculum development in the respective countries, budget allocations to such agencies are not specific with regards to allocations for integrating climate change education content into the curriculum. However, Zimbabwe and Rwanda have made progress towards enacting provisions for climate change education financing. In Zimbabwe, the environmental fund under the Environmental Management Agency supports various climate change adaptation activities. The Green Climate Fund also contributes to financing climate change education in the country. In Rwanda, there exists a long-term framework for financing climate change education anchored on the country's Environmental Education for Sustainable Development strategy. Rwanda's Environment and Climate Change Fund was also set up for various strategic investments in climate resilience. Overall, Rwanda has outlined plans to spend up to USD 6.4 million on enhancing knowledge of climate change among its citizens by 2030 (Republic of Rwanda, 2020).[74]

While components of climate change education have been integrated into the curriculum across most countries in the MEESA region, there exist no standalone subject on climate change. Instead, key components and messages on climate change are delivered through carrier subjects, mainly biology, agriculture, geography, and, in some instances, Environmental Science, in primary and secondary levels of education. Post-secondary, there exist various courses, trainings and research opportunities across various institutions of higher learning. For instance, in Malawi, the Malawi University of Science and Technology (MUST), Lilongwe University of Agriculture and Natural Resources, Mzuzu University and Malawi Polytechnic offer various climate change courses. The University of Malawi, Mzuzu University and Lilongwe University of Agriculture and Natural Resources also offer various post-graduate courses with climate change as a research option. In Zambia, the University of Zambia, Chalimbana University and Copperbelt University offer various courses related to climate change education. Similarly, in Tanzania, the University of Dar es Salaam, The University of Dodoma, Ardhi University and Sokoine University of Agriculture have also incorporated components of climate change education into their curricula. These efforts/higher learning options are evident across the region, although countries in Eastern and Southern Africa are more established in integrating and delivering climate change education to learners.

Progress and efforts to deliver climate change and environmental education also vary across countries in the MEESA region. In countries such as Kenya, Rwanda, Zimbabwe and Malawi, significant strides have been made toward incorporating key lessons and subjects with components of climate change education across all levels of learning. However, in other countries, particularly in Zambia, South Sudan, Egypt and Somalia, the progress is limited. Further, in South Sudan and Somalia, the underdeveloped education infrastructure, coupled with other issues characterizing the contexts such as poverty, drought and conflict continue to limit access to education opportunities for a considerable proportion of learners. As such, only a small proportion of learners benefit from the existing content on climate change within the curriculum. In Tanzania, the existing provisions for delivery of climate change education remain outdated, with recent policy provisions such as the National Climate Change Response Strategy providing no clear guidelines on delivery of climate change education.

There is limited emphasis on enhancing teachers' readiness to deliver climate change education. Whilst there is notable progress towards integrating climate change education into the curriculum across most countries in the region, it is notable that the existing policy instruments, guidelines and programmes by governments do not emphasise empowerment of teachers and other learning facilitators to deliver climate change education content. A 2021 UNESCO assessment of how countries are integrating climate change issues in education noted that a substantive majority of teachers were not familiar with suitable pedagogies to deliver climate change education.[75] Additionally, teacher training programmes largely do not include environment-related content. This represents a significant gap in the overall process of delivering climate change education.

74 Republic of Rwanda, 2020. Updated Nationally Determined Contribution. Ministry of Environment. https://www4.unfccc.int/sites/ndcstaging/PublishedDocuments/Rwanda%20First/Rwanda_Updated_NDC_May_2020.pdf

75 UNESCO, 2021. Getting every school climate-ready How countries are integrating climate change issues in education. United Nations Educational, Scientific and Cultural Organization https://unesdoc.unesco.org/ark:/48223/pf0000379591/PDF/379591eng.pdf.multi

Overall, investments in climate change education remain insufficient across the MEESA region. The absence of a defined framework for financing climate change education is indicative of the limited prioritization and focus by government on climate change education. This signals the need for accelerated action by government and no state actors in prioritizing climate change education through budget allocation.

CASE STUDY 4: INVESTMENTS IN CLIMATE CHANGE EDUCATION IN ZAMBIA

Analysis of the education sector budgets in Zambia shows that by 2021, there were no specific budget provisions for climate change education. However, the launch of the National Climate Learning Strategy in 2021may inform such considerations and resource allocation within the education sector budget in the future. Outside the education sector, the study noted various budget provisions for programmes and activities related to climate change across government ministries and departments. Some of these key provisions are highlighted in the table below.

Table 13: Key Investments in Climate Change in Zambia – 2019 (USD Thousands)

PROGRAMME	ALLOCATION IN 2019
Climate Change Gender Action Plan – Ministry of Gender	16.8
Pilot Programme for Climate Change Resilience - Ministry of National Development Planning	12,266.2
National Climate Change Fund - Ministry of National Development Planning	784.0
Third National Communication on Climate Change - Ministry of Water Development, Sanitation and Environmental Protection	13.5
Coordination of Climate Change Activities - Ministry of Housing and Infrastructure Development	2.8
Support to Climate Change Adaptation Programmes - Ministry of Tourism and Arts	3.4
Climate Change Mitigation and Adaptation Research Dissemination – Livestock Development Department	47.6
Climate Change Mitigation and Adaptation Research – Fisheries Research Stations	2.8
Support to climate change project – District Agriculture Coordinating Office	0.6
Support to Climate Change - District Agriculture Coordinating Office	0.6
Climate Change Adoption and Awareness – Meteorological Department	2.2
Climate Change Adoption and Awareness – Meteorological Department	1.1

In 2020, the government spent USD 6.2 million on various Natural Resource Management programmes, which include various climate change adaptation programmes.

Table 14: Key Investments in Climate Change in Zambia – 2021 (USD Millions)

PROGRAMME	ALLOCATIONS IN 2021
Climate Change Adaptation and Disaster Risk Reduction Activities and Operations	3.02
Pilot Programme for Climate Change Resilience – Ministry of National Development Planning	26.15
National Climate Change Fund – Ministry of National Development Planning	0.78
Forest protection activities, forest survey and mapping, agroforestry and afforestation, research and development - Ministry of Lands and Natural Resources	0.17
Forest protection, forest regeneration and expansion and forest Research and Development - Ministry of Lands and Natural Resources	3.48
Climate Policy Implementation and Biodiversity Conservation - Ministry Of Lands And Natural Resources	3.86
Forestry Skills Development - Ministry of Lands and Natural Resources	0.28
Natural Resource Management, Muchinga Province	0.45
Natural Resource Management, Lusaka Province	0.49
Natural Resource Management, Copper belt Province	0.69
Natural Resource Management, Western Province	0.69
Natural Resource Management, Eastern Province	0.64
Natural Resource Management, Luapula Province	0.64
Natural Resource Management, North-Western Province	0.64
Natural Resource Management, Southern Province	0.71

Overall, the government of Zambia is yet to make tangible efforts toward adapting the education sector budget to reflect its commitment to address climate change issues, particularly through climate change education. What is evident is that components of climate change education are scattered across various government MDAs and embedded within allocations to other government programmes and activities.

5.8 CHANGES IN ALLOCATIONS TO EDUCATION ATTRIBUTABLE TO THE COVID-19 PANDEMIC

Prevalence of the COVID-19 pandemic resulted in significant social and economic shocks globally. Containment measures instituted by governments translated into a disruption of economic and social activities. The education sector was among the most adversely affected, as evident from the closure of schools and suspension of learning at the onset of the pandemic. Similar responses were evident across Africa, including in the MEESA region. In Uganda, for instance, the closure of schools lasted for two years - up to January 2022 when the government relaxed the containment measures.[76] What impacts did the pandemic have on funding and budgeting for education in the region?

76 Patience Atuhaire. Uganda schools reopen after almost two years of Covid closure. BBC, January 10, 2022. https://www.bbc.com/news/world-africa-59935605

- **The pandemic and resulting containment measures instituted resulted in substantive economic shocks whose implications limited fiscal space for governments within the region.** According to the International Monetary Fund (IMF), the pandemic aggravated financing pressures in Sub-Saharan Africa, despite challenges with revenue mobilization before the pandemic.[77] Further, measures instituted to alleviate pressure on citizens and corporates negatively impacted the ability of governments to mobilize revenue to finance public expenditure. With much of the available resources being diverted to health for containment of COVID-19, resource allocations to sectors such as Education were significantly contracted.

- **The closure of schools and demand for space due to social distancing requirements exposed the massive infrastructure and learning resources gaps.** This significant gap in infrastructure and learning resources was a demonstration of limited investment and prioritization of the education sector before the pandemic. Available infrastructure across most countries in Africa, including the MEESA region, were insufficient to accommodate the demand. In Kenya, for instance, the Cabinet Secretary for Education directed that learners study under trees to achieve social distancing requirements.[78] This is despite Kenya ranking first among countries within the MEESA region in financing the education sector. Similar shortfalls in infrastructure and learning resources were notable across the MEESA region.

- **COVID-19 widened existing education financing gaps pre-pandemic.** According to the United National Children's Fund (UNICEF), increase in debt repayment is linked to declined social spending.[79] Rising debt repayment obligations and slow economic activity across the region was already limiting the ability of governments to sufficiently and sustainably finance the education sector even before the pandemic hit. Economic disruptions occasioned by the pandemic further complicated and worsened existing challenges in distributing limited resources among competing spending priorities. Consequently, the likelihood of governments increasing investment in education to meet the local demands and international benchmark regarding education sector financing in the mid-term appear slim. Further, whilst most countries within the MEESA region are on the path to recovery from the pandemic as the rest of the world, the magnitude of the shock is likely to extend beyond the immediate future, further limiting prospects of increased investments in the education sector.

- **The pandemic also resulted in a decline in ODA to education further limiting options for countries that significantly rely on external support for the education sector like Malawi, South Sudan Zimbabwe and Somalia.** As demonstrated in section 5.2 there has been an overall decline in ODA to education across all countries in the MEESA region in 2020 compared to the two previous years. Most of ODA received went into supporting health and economic, infrastructure and support programmes. As such, countries with a heavy reliance on ODA were disproportionately affected. It is unlikely that ODA to education will increase significantly in the mid-term considering the declining trends prior to the pandemic. Additionally, a similar scenario to the 2008 global financial crisis is likely to be witnessed where ODA levels reached the pre-crisis levels in 2019 according to World Bank reports.[80] This signals the need for governments to focus on funding education sector through domestic resources.

77 Aslam, A., Delepierre, S., Gupta, R. & Rawlings, H., 2022. Revenue Mobilization in Sub-Saharan Africa during the Pandemic. African Department, International Monetary Fund. https://www.imf.org/-/media/Files/Publications/covid19-special-notes/en-covid-19-special-series-revenue-mobilization-in-ssa-during-the-covid-19-pandemic.ashx

78 Trizza Kimani. Magoha doubles down on under-tree classes, says they add oxygen. The Star, January 7, 2021. https://www.the-star.co.ke/news/2021-01-07-magoha-doubles-down-on-under-tree-classes-says-they-add-oxygen/

79 Muchabaiwa, B. L., 2021. The Looming Debt Crisis in Eastern and Southern Africa: What it Means for Social Sector Investments and Children. United Nations Children's Fund (UNICEF), Eastern and Southern Africa Regional Office (ESARO) https://www.unicef.org/esa/media/9636/file/UNICEF-ESARO-Looming-Debt-Crisis-2021.pdf

80 OECD, 2020. The Impact of the coronavirus (COVID-19) crisis on development finance. https://read.oecd-ilibrary.org/view/?ref=134_134569-xn1go1i113&title=The-impact-of-the-coronavirus-(COVID-19)-crisis-on-development-finance

- **Household (out-of-pocket) funding was a significant stream for financing education prior to the pandemic. Implications of the pandemic on private/household incomes have negatively impacted ability of many families to finance their children's education.** With the loss of livelihoods and deletion of savings, many households have been limited in their ability to finance education out of pocket - payment of school fees and other levies. This resulted in a considerable proportion of learners deferring their studies or moving to public schools. In Kenya, for instance, more than 100 private schools impacted by lack of operational income were unable to resume operations when schools reopened.[81]

- **The declined or stagnated investment in education is likely to impact key education outcomes negatively, particularly for countries whose education sectors were underdeveloped prior to the pandemic.** It is thus likely that moving forward, funding to education will remain depressed with the existing gaps and vulnerabilities characterizing the education sector continuing to manifest and deepen if governments within the MEESA region do not make bold commitments in terms of capital investments.

81 Adhiambo, M. (2020) More than 100 private schools won't reopen, says association. The Standard, October 27, 2020. https://www.standardmedia.co.ke/adblock?u=https://www.standardmedia.co.ke/education/article/2001378362/more-than-100-private-schools-won-t-reopen-says-association

SECTION SIX: EMERGING ISSUES

- **Substantive progress has been made by States across the region towards attaining education outcomes:** Generally, there is good progress by governments in the region towards achieving major education outcomes as evidenced by indicators like enrolment, retention, transition and gender parity among others. There however remain disparities remitted by geography (especially the rural-urban divide), income inequalities, and socio-cultural barriers (like FGM, CEFM and preference for boys). More action in terms of progressive policy and resource investments can continue to address these.
- **There is notable progress in terms of gender inclusion in the education sector in most of the jurisdictions in the region.** This is enabled especially by direct programmes and policies targeting reduction of costs, elimination of barriers and addressing inherent inequalities that limit opportunities for girls. However, more policy coherence, increased investment and advocacy targeting barriers to education for girls are still necessary.
- **There remain challenges in terms of child protection, reduction of GBV and addressing Sexual Reproductive Health needs more holistically.** Incidences of GBV and SRHR related challenges faced by girls remain high across the region. This includes not only services and commodities but also curriculum adjustments that respond accordingly.

- **Prioritisation of education is uneven across jurisdictions in the region:** Whilst some countries appear to elevate and prioritise education as seen in proportions of education in the budget, others appear to lag behind in achieving GPE public expenditure targets. This points to the inadequacy of political will, resource limitations and competing resource demands among other challenges like State fragility.

- **Policies make a difference – but require reviews and regular updates.** Where there exist policy and legal frameworks upon which stakeholders can base their advocacy for resource investments and government action, there is notable progress. More work is necessary nonetheless, in updating policies, reviewing existing plans and harmonising them with others to ensure effectiveness and efficiency, especially in utilisation of resources. This is necessary to build the body of evidence to inform policy and allocation of resources.

- **International instruments, standards and commitments matter.** The Global Partnership for Education is a sterling example. They provide benchmarks upon which national actors make policies and laws that govern and facilitate administration of the education sector. They have also been useful in terms of encouraging governments to act and keeping them accountable on commitments to the sector. Afro-centric – regional and/or continental level instruments for education sector, if pursued concertedly, can contribute to pressure and incentives for African governments in the region to act accordingly.

- **Resource challenges present major limitations to government investment in education sector:** Some countries in the region operate with fairly narrow resources bases and tight macro-economic environments that impede economic development and revenue generation for government. Some of these macro-economic challenges are linked to inadequacies in public finance management; State fragility like in Somalia and South Sudan; corruption; and Illicit Financial Flows especially for resource rich countries like Zambia and Zimbabwe. There is room for States in the MEESA region to improve Domestic Resource Mobilisation to increase revenues and size of budget available for education.

- **There is significant dependence on ODA and other forms of international development financing across most of the jurisdictions in the region, which raises not only questions of sustainability but also of independence of education systems in the region.** This happens against the backdrop of gaps in Domestic Resource Mobilisation, even for natural resource-rich countries. There is room for various actors to work towards addressing corruption, tax base erosion and the growing public debt problem in the region that limits fiscal options that governments have to work with.

- **Access to information remains a major bottleneck to effective policy implementation and accountability for resources invested in education:** For most cases in the region, budget documents, which are essentially public documents that should be available to stakeholders are hardly published on government websites or made available through legal channels. Government officers also seem unwilling to disclose budget information and where information is available, it is inadequate - incomplete, dated and or published in formats unfriendly for analysis. This also applies to auxiliary information like sector review reports, policy reviews, policy documents among others. Such information asymmetries limit advocacy, accountability and meaningful inclusion of all stakeholders in education sector policymaking.

- **Inadequate data disaggregation limits effective tracking and analysis of budget and other resources in the education sector.** Whilst the bigger problem of access to budget data and other public finance information is underscored, lack of sufficient disaggregation of budget data, where it exists, further complicates budget tracking and advocacy for accountability for resources invested in the sector. Disaggregation is limited in differentiating allocations/expenditures in terms of recurrent vs development of capital expenditure that is necessary for interrogating the extent to which investments are made in facilities, equipment, books and infrastructure that impact the quality of learning. Also, disaggregation is limited in terms of sub-sector allocations/expenditures to allow interrogation of responsiveness to gender, disability inclusion and climate change integration. For many budget documents available to this study, data is scanty on specific vote heads earmarked for the promotion of gender equity, SNE and also climate change education.
- **Despite progress in some jurisdictions, public policy-making processes in the education sector need more openness and public participation to ensure inclusiveness.** Whilst in some States like Kenya, elaborate frameworks have been institutionalised for promoting public participation in policy-making, others still operate with fairly closed policy-making systems that limit inclusion of all stakeholders. Advocacy for more open public policymaking spaces and action by non-state actors like CSOs can facilitate inclusion of contributions from all stakeholders to add to the knowledge and information that government relies on in making and implementing education policies. To make them more just, equitable and prudent.
- **Inefficiencies in terms of sector management – planning, allocative efficiency, and management of resources especially human resources (teachers) remains a challenge in most jurisdictions within the MEESA region.** Such inefficiencies limit the quality of education and overall access. These are attributed to policy coherence challenges, capacity limitations (both human resource and institutional), politics of resource distribution and introduction of devolution or decentralisation in some jurisdictions like Rwanda, Zambia and Kenya. This points to the need for investments in institutional capacity development and human resource development (especially targeting teachers).

SECTION SEVEN: CONCLUSION AND RECOMMENDATIONS

CONCLUSION

As outlined in African Union Vision 2063, education is a fundamental ingredient in the mix of efforts toward achieving sustainable economic development in the continent. For instance, the continent's drive towards increasing intra-regional trade espoused in the ACFTA requires significant development of human capital – to aid the production and competitiveness of the continent as an investment destination. The Continental Education Strategy for Africa 2016-2025 targets an effective system of education and training to provide Africa with capacity to achieve Vision 2063. Also, the Sustainable Development Goal 4 aims to ensure inclusive and equitable quality education and promote lifelong learning opportunities for all. The education sector is thus critical to growth and development in the continent and as such requires a deliberate and dedicated focus in terms of policy and resource investments.

This research has established that substantive progress has been made by states across the region toward attaining education outcomes. This is evident with significant improvements in general access (demonstrated by high enrolment rates and notable progress in ensuring gender parity). Nonetheless, there remain gaps in assuring quality education, transition rates, equity, disability inclusion, child protection, nutrition, reduction of GBV and addressing Sexual Reproductive Health needs. Most of these challenges are attributed to resource challenges that limit available infrastructure, facilities, equipment, learning and teaching materials (like books), and human resources (teachers).

Across the region, there are robust policy frameworks at national levels that buttress planning, coordination, resource allocation and management of the sector. However, there is need for more rigorous policy reviews and regular updates of sector plans and strategies to keep up with the dynamic needs of the sector.

Regarding financing education in the MEESA region, the general outlook is that although education sector receives the largest proportions of budgets across most States, allocations to the sector are yet to meet the GPE summit targets of at least 20% of the total budget and 6% of GDP. Kenya is the only country in the region whose allocations to the education sector have consistently exceeded the GPE benchmarks with 26.7% of budget. However, it has failed to reach the 6% of GDP target. States vary in terms of prioritisation of the sector. Whilst some countries (like Kenya, Uganda and Rwanda) demonstrate political will in terms of policy attention and resource allocation, others (like Zimbabwe, Malawi, South Sudan and Somalia) appear constrained by macro-economic challenges and State fragility that manifest in competing resource demands that limit available resources for education. Zimbabwe, South Sudan and Malawi had the lowest proportions of education sector budget as a share of GDP among the six countries sampled. However, significant progress has been made in South Sudan where there has been a steady increase in education budget as a share of the country's estimated GDP - from 0.4% and 1.3% in FY2018/19 and FY2019/20 to 1.9% in FY2020/21. This is a substantive improvement considering South Sudan is still grappling with the aftermath of decades of conflict and underdevelopment. There is significant dependence on Official Development Assistance (ODA) across many of the jurisdictions in the region that raises not only questions of sustainability but also of independence of education systems in the region. This happens against the backdrop of gaps in Domestic Resource Mobilisation, even for natural resource-rich countries like Zambia and Zimbabwe. There is room for various actors to work towards addressing corruption, tax base erosion and the growing public debt problem in the region that limit fiscal options that governments work with.

Regarding gender responsiveness of budgeting – whilst States in the region implement laws and policies that guarantee gender equality in education sector, there is a general lack of elaborate and efficient frameworks for financing promotion of gender parity in education. Nonetheless, good progress has been made in allocations - it is possible to note specific budget vote heads and programmes that seek to address issues that limit gender equity in education. Due to data limitations, especially lack of sufficient disaggregation of data and limited comparability – determining the size of proportion of budget that goes to gender remains a challenge. Further, there is the tendency of several programmes that promote gender equality within the education sector and their associated budgets to be embedded within allocations to other government ministries and departments outside the ministry of education. This limits ability to aptly track utilisation and accounting for resources earmarked for promotion of gender inclusion.

Regarding disability inclusion – States in the region have made effort towards increasing disability inclusion in education – through the enactment of policies that recognise rights and endeavour to provide opportunity for learners with disability though a lot of effort in terms of resources and policy implementation is still necessary. The region lacks specific guidelines on budgeting for learners with disabilities. Allocations to such critical aspects as training of teachers, development of suitable learning materials, provisions for critical infrastructure are insufficient and often remain embedded within larger allocations to associated programmes. Also, there is inadequate inclusion of views of persons with disabilities during processes for budgeting and allocation of resources in the education sector.

Regarding integration of climate change into education sector - substantive progress has been realized with regards to mainstreaming components of climate change education. However, the region lacks clearly defined framework for financing climate change education which limits investments in climate change education. Elements of climate change education and environmental conservation remain insufficient and scattered across various government programmes and MDAs across the MEESA region. The absence of a defined framework for financing climate change education is indicative of the limited prioritization and signals the need for accelerated action by government and non-state actors like Civil Society.

Inefficiencies in terms of planning, allocative efficiency and management of resources especially human resources (teachers) remains a challenge. Despite progress in some jurisdictions, public policy-making processes in the education sector need more openness and citizen participation. Information asymmetry (between government and non-state actors/citizens) remains a major bottleneck to effective policy implementation and accountability for resources invested in the sector. Inadequate data disaggregation limits effective tracking and analysis of budget and other resources in the education sector. Advocacy for more open public policy-making spaces can facilitate inclusion of contributions from all relevant stakeholders to add to the knowledge and information that government relies on in making and implementing education policies.

RECOMMENDATIONS

This research has explored resource investment to the education sector in the MEESA region. It has interrogated the various contexts to develop an understanding of the extent to which the Education Sector budget is adequate, gender-responsive and inclusive. It emerges that whilst the sector appears to receive significant shares of budget across the board, prioritisation is uneven and falls below global commitments – GPE and SDGs. Financing education is hampered by significant macro-economic challenges remitted by debt repayments, Illicit Financial Flows from the region, corruption and State fragility that availability and efficiency in management of resources allocated to the sector. Moving forward, hereunder are some recommendations/ avenues for change that education sector stakeholders across the MEESA region, especially CSOs like Plan International and partners, can pursue to promote reduction of gender inequities, disability inclusion and integration of climate change education.

1. Target political actors with advocacy messages to increase prioritisation of education at national and regional (AU and RECs) levels. This should include targeting a balance between investments in social sectors (like education) and infrastructure;
2. Advocate for more budget transparency – to increase access to information on plans, resource allocation and expenditures of resources to the sector. This should include advocacy for better disaggregation of data;
3. Contribute to advocacy for increased Domestic Resource Mobilisation (DRM) across the region – to increase resources available to education sector including advocacy for reduction of Illicit Financial Flows (IFFs) out of the region that limit government revenues;
4. Advocate for accountability in the sector to ensure available resources are efficiently managed and utilised.
5. Encourage States at national level to conduct more rigorous reviews of sector policies and regular updates of plans to generate current information for the sector to keep up with emerging issues and trends;

6. Encourage relevant education sector Ministries, Departments and Agencies (MDAs) at national levels to strengthen management information systems to facilitate regular gathering of data on sector outcomes to inform policy and resource allocation;
7. Broker multi-stakeholder dialogue (between education sector stakeholders and national Treasuries) towards better costing of education needs especially considering introduction of new curriculums and emerging needs like ICTs, Climate Change Education and Special Needs Education;
8. Advocate for more open public policy-making processes in the sector at national levels to promote inclusiveness and increase citizen participation – in planning, budgeting and expenditure review;
9. Conduct more in-depth country-level public expenditure reviews for the sector to increase information available for advocacy;
10. Advocate for the formulation of specifically tailored sector policies or guidelines that address gender inequities, disability inclusion and integration of climate change into the education system;
11. Advocate for more capacity development targeting both institutional and human resources on management and coordination especially for states with devolved or decentralised education systems to minimise inefficiencies in application of sector resources;
12. Advocate for improved teacher welfare that addresses teachers' pay, teacher training institutions, recruitment and benefits to increase morale and job satisfaction.
13. In terms of sub-sector resource allocation, advocate for more resources for ECDE and post-primary education to cater to increased demand and to improve transition.
14. Encourage States to increase balance between recurrent expenditures and development to cater to increased demand for facilities, infrastructure and equipment;
15. International instruments, standards and commitments matter - advocate for States to honour commitments towards SDG 4 and implementation.

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