



## **Interim Report of Task Force 3 on Education and Gender Equality**

### **EXECUTIVE SUMMARY**

June 2004

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#### **Note to the reader**

This Executive Summary is a preliminary output of the Millennium Project Task Force 3 on Education and Gender Equality. The recommendations presented herein are preliminary and circulated for public discussion. Comments are welcome and should be sent to the e-mail address indicated above. The Task Force will be revising the contents of this document in preparation of its Final Task Force report, due December 2004. The Final Task Force report will feed into the Millennium Project's Final Synthesis Report, due to the Secretary-General by June 30, 2005

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9 - Open, Rule-Based Trading Systems	<ul style="list-style-type: none"> <li>• Patrick Messerlin</li> <li>• Ernesto Zedillo</li> </ul>
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**Millennium Project  
Task Force on Education and Gender Equality**

**Interim Report on  
Achieving the Millennium Development Goal of  
Universal Primary Education<sup>1</sup>**

**Executive Summary**

**Introduction**

The Millennium Project Task Force on Education and Gender Equality, an expert advisory group commissioned by the United Nations Secretary General, has examined global trends in education; identified six ways in which education sector policies and practices must be transformed to stimulate the unprecedented rate of improvement required to achieve the Millennium Development Goal of universal primary education by 2015; and set out recommendations for actions to be taken by the international community in support of that transformation.

The interim report, a main product of the Task Force's deliberations, is not in any way intended to be the "final word" of the Task Force. Rather, it seeks to be a vehicle through which the Task Force can convey its current thinking about priorities – and particularly priority actions to be taken by donor countries and key technical agencies. It is also the way in which the Task Force highlights the range of views within the group. The Task Force expects to use the interim report for the purposes of broad consultation with civil society representatives, other experts, decision makers in international agencies, and others between February and August 2004. The results of the consultations will then inform the final report of the Task Force.

**The need for transformation.** A review of the history of goal-setting in the education sector since the 1930s, and of the trajectory of enrolments in both upper- and lower-income countries strongly suggests that achievement of the Millennium Development Goal for education will be possible only if the future is dramatically different than the past. For the Task Force, this implies the need to conceptualize anew the challenge of universalizing education.

Education is, first and foremost, the vehicle through which societies reproduce themselves; thus, the inputs are not only teachers, schools and textbooks, but the full set of ideas about how a given society is structured and should be structured in the future. The outputs are not only students enrolled in and completing education cycles, but also citizens imbued through formal education with a particular perspective.

Decisions affecting both *what* is taught and *who* is taught are part of the process of social reproduction. With respect to *what* is taught, the leading figures within one generation transmit

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<sup>1</sup> Please address comments to Ruth Levine, [rlevine@cgdev.org](mailto:rlevine@cgdev.org).

to the next generation their understanding of history and the essential skills, knowledge and beliefs for the perpetuation of the society. With respect to *who* is taught, policies and practices related to resource allocation, placement of schools, the scope for private sector involvement, and overt or invisible barriers to access lead to outcomes that generally reinforce social stratification.

Explicitly recognizing the social reproduction objective of education helps to explain the painfully slow progress toward universalization of education and gender parity to date, and the troubled history of many of the reform efforts that have been undertaken to increase and democratize access to educational opportunities. Actions that are fundamentally *evolutionary* – that is, actions that seek to “make bigger” the existing system – are unlikely to lead to universal education, particularly in societies characterized by profound economic, gender and ethnic inequality. Instead, success depends on actions that are fundamentally *transformational* – using specific levers to induce fundamental changes toward a more democratic and egalitarian future.

### **Task Force Messages**

The Task Force holds the view that policies and practices that are truly aimed at achieving universal primary education by 2015 should be informed by the following messages:

**Mothers matter most.** Sustained progress toward universal primary education requires actions to improve the status of girls and women. Education of girls and mothers has the unique ability to enable a transformation from a situation in which having children out of school is socially acceptable to one in which the expectation is that every child completes a course of schooling. Cross-country and individual country studies from Africa, Asia and Latin America over the past 25 years reveal an unmistakable pattern: mothers’ education is a strong and consistent determinant of their children’s school enrolment and attainment. Research finds that a mother’s level of education has a strong positive effect on their daughters’ enrolment – more than on sons and significantly more than the effect of fathers’ education on daughters. Studies from Ghana, Egypt, Kenya, Peru, Malaysia, India and Mexico all find that mothers with a basic education are substantially more likely to educate their children, and especially their daughters, even controlling for other influences.<sup>2</sup> Thus, priority should be given to ensuring gender parity at all levels of education, and to overcoming barriers that prevent good quality education for girls.

**A little education isn’t enough.** At its current quality, schooling does not produce enduring benefits until a minimum threshold is reached. The location of that threshold varies by context—not only degree of gender stratification, but also such factors as level of development and rural/urban setting. In general, more education will be required to secure returns in settings that are more gender-stratified or more impoverished. The threshold also varies depending on the outcome being measured: literacy, labor market returns, fertility, violence against women, and HIV/AIDS risk.

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<sup>2</sup> Lavy, 1996; Ridker 1997; King and Bellew, 1991; Lillard and Willis 1994; Alderman and King, 1998; Kambhupati and Pal, 2001, Parker and Pederzini, 2000; Bhalla et al, 2003.

With respect to literacy, a growing body of research suggests that completion of at least five to six years of schooling is a critical threshold for sustainable mastery of basic competencies. Evidence clearly suggests that the downward effect of education on fertility is strongest at or above the secondary school level. One cross-country study examining fertility and secondary school attainment among women in 65 low and middle-income countries in 1985, collectively including 93 percent of the population of the developing world, found that in countries where few women had a secondary education, family size averaged more than five children, of whom one to two died in infancy. But in countries where half the girls were educated at the secondary level, the fertility rate fell to just over three children and child deaths were rare (\*\*ref Subbarao and Raney, 1995).

While the Millennium Development Goal to which world leaders have subscribed focuses on primary education, it is likely that this is insufficiently ambitious to generate the hoped-for benefits. The approach of “basic education,” which may be up to nine years of schooling (depending on local definitions of a cycle of basic education), is likely to be an aspiration that is more consistent with the long-term goal of prosperity and greater human welfare in today’s developing countries (the developed countries of tomorrow). This is particularly true given the unprecedented size of the adolescent population, and the need to empower young women to manage the risks of HIV/AIDS, unintended pregnancy and other threats to their welfare.

**Parents, and other citizens, have the right to know.** At the local level, parents and school administrators need information about the effectiveness of their local schools to exercise their role in maintaining accountability. Simple indicators of relative performance—spending per child, preparation of teachers, educational outcomes compared with other schools—are essential. Such information is generally unavailable to parents, particularly parents who are most likely to be faced with failing primary schools.

Examples from the varied contexts of Brazil and Uganda illustrate the point. In 2001, the Education Secretariat of the State of Parana in Brazil introduced the Boletim da Escola, an annual school report card of the performance of each of the primary and secondary schools under its jurisdiction. The report cards seek to increase accountability of the schools and government to the community. The cards help the community, the government, and the school adopt a shared vision of universal primary education, while empowering parents to participate in the education process and inform decision making at all levels. In Uganda, a 1991-1995 survey revealed that only 20 percent of central government funding destined for local schools was actually reaching them. In response, the central government launched an information campaign. Each month, it provided data on training transfer grants to school districts. This information was published in newspapers and broadcast on the radio. Equipped with such information, local communities were able to monitor the flow of federal funds precisely and effectively. By 2001, fully 80 percent of federal funds were reaching schools. "Many other changes were occurring in Uganda during the same period, so the impact of the transparency in information per se is impossible to isolate. However, schools with access to newspapers increased their funding on average by 12 percentage points more than schools with no access to newspapers."<sup>3</sup>

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<sup>3</sup> Reinikka and Svensson, 2003

**More money, better spent.** There is little doubt in anyone's mind that achieving universal primary education, encompassing gender equity at the primary level, will cost much more than is currently being spent, either by developing country governments or by the international aid community. Estimates vary, with the total financing needs to support universal primary education ranging from about \$9 billion to \$28 billion per year. For the more conservative estimates of resource requirements (\$9-10 billion per year), external financing requirements for poor countries are likely to be somewhere between \$2-6 billion per year – also a large range, and at any level representing a substantial increase over current spending levels. Moreover, if this Task Force's message about the importance of post-primary education is appropriated, then the price tag will be even larger.

While the various cost projections vary greatly in size, they share common features:

- First, all estimates suggest that recurrent costs, rather than capital investments, represent the bulk of required funds. About 55 percent of the external gap is for recurrent costs and only 45 percent for capital investments.<sup>4</sup> Policies regarding external assistance have to address the fact that they are, instead, largely focused on capital expenditures.<sup>5</sup>
- Second, the costs are large relative to current spending in some countries, although the estimates toward the lower end of the range appear to be feasible for many. For example, the US\$9.1 billion per year estimate from UNICEF is equivalent to a 1.1 percent annual increase in spending between 2000 and 2015. Bruns et al 2003, estimate that as a whole, even the low-income countries can cover more than 80 percent of the incremental costs for achieving the MDG target. UNESCO (2002) is more conservative in its evaluation of the capacity to mobilize domestic funding, but still recognizes that national resources will outweigh international assistance.
- Third, differences between countries and regions are extremely large in terms of the affordability of reaching universal primary enrollment. Sub-Saharan Africa stands out as being the region in which external aid would have to play the largest role due to the limited capacity to mobilize domestic funds, requiring US\$1.9 billion annually in external aid. South Asia's low-income countries have the second largest needs, of about US\$400 million annually.
- Fourth, efforts by middle-income countries to mobilize more resources or use them more efficiently in reaching the goal of universal primary enrolment could free up external aid for the lowest income countries that have the greatest needs.
- Fifth, the range of estimates is heavily influenced by the quality of programs and policies. Efforts will be required to reduce repetition, allocate sufficient resources to complementary inputs, and maintain facilities. In half the low-income countries,

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<sup>4</sup> Bruns et al 2003, p. 103.

<sup>5</sup> Report to Development Committee, Sept. 2003

teachers' salaries may need to be raised while in others the difficult prospect of lowering salaries may be required. Any of these policies can markedly affect the total costs of reaching universal primary enrollment.

- Finally, it is extremely difficult given current data systems to track and account for donor spending in education. Much of donor contributions are in non-monetary form (in-kind contributions, technical assistance, and so forth), and there is a large difference between the amount allocated in a foreign assistance budget and the amount that gets “to the ground level” for program inputs. To date, no system has been developed that provides adequate information to permit the international community to see whether spending by specific donors is or is not “filling the gap” between what is needed and what the national governments are able to provide.

Tangible resources are not the only necessary input – and cross-country analyses show that there is remarkably little correlation between education sector spending and performance. Education system success has many other inputs, including: political commitment and leadership; administrative continuity and capacity; productive relationships between teachers' unions and government; and community involvement and local autonomy in some decisionmaking.

**Focus on the hard-to-reach.** Expanding access to and completion of primary schooling implies reaching the children who are from households that are at society's margins. In all countries, poor children and girls are less likely to start school, more likely to drop out, and more likely to engage in child labor or domestic chores that keep them out of school. Therefore, universal completion primary schooling cannot be achieved without addressing the specific reasons that keep poor children and girls out of school, repeating grades, and dropping out.

Interventions targeted at getting poor children and girls into school and keeping them there operate by making schooling affordable for parents and/or compensating for opportunity costs for girls; or they may improve students' ability to learn through school feeding and school health programs.

**The economy matters, too.** Education clearly has intrinsic value, but some of the benefits of education – particularly its effects on economic growth and on women's empowerment – are highly dependent on context, which in turn is affected by policy decisions and actions outside of the education sector *per se*.

Creating a supportive economic environment is important for education to be able to contribute to economic growth, and for attaining universal primary enrollment. This can operate from either the supply or the demand side. In terms of supply, stagnant economies simply have fewer resources available to invest in children's education. The contrast between Latin America and East Asia is instructive. In 1960, educational attainment in the two regions was comparable and Latin America was, on average, somewhat wealthier. Today, the two regions spend similar shares of GDP on education – but East Asia's rapid growth during the intervening decades means that this share comes out of a larger pie. Consequently, for the same share of national income, East Asian countries can now invest substantially more than Latin American countries.

On the demand side, the returns to education are lower in slow-growing economies, thereby blunting incentives to send children to school. One of the explanations for declining or stagnating enrolment ratios in Sub-Saharan Africa in the 1980s is that there were fewer jobs for graduates in both the private and public sectors. Consequently, private returns to education fell, leading to reduced incentives to stay in school.<sup>6</sup> In Latin America, returns to primary schooling tend to be low relative to tertiary schooling. Consequently, the incentive to progress through primary school is low except for those who expect to be able to go on to university. This contributes to the polarized distribution of education and income in that region.<sup>7</sup>

In short, attention to the economic development strategy – typically outside of the purview of either education sector officials or donors deeply involved in the sector – can make the difference between education that yields the full range of desired benefits and education that does not; and it can strongly affect the household decisions about sending children to school.

### **Task Force Recommendations**

The messages above have to do with policies and practices in developing countries that would accelerate progress toward universal primary education. The relevance and emphasis on each varies among countries. Governments in each bear the major responsibility. Bearing this in mind, the Task Force developed recommendations that are more specific and concrete directed to the international community: the United Nations, the donor agencies, and the technical agencies.

**Recommendation 1. Donors should commit publicly to supporting a dedicated facility with a starting balance of at least \$1 billion, which would be drawn down and replenished as it is used to fund the credible education sector plans developed under the “Fast-Track Initiative” (FTI) mechanism.** The facility could be a Trust Fund held at the World Bank, with annual lump-sum disbursements from any single donor to any particular country contingent on that donor's agreement. [Note that the optimal institutional arrangements for such a fund are subject to debate.]

**Recommendation 2. The Fund should cover basic (not only primary) education in countries that qualify, if recipient countries request such funds, with the objective of keeping adolescents in school and increasing the likelihood that children will be motivated to complete primary school.** Exclusive emphasis on primary schooling – and particularly enrolment in primary school – by donors (and developing country governments) will curtail the true benefits of education, which are attained only after at least five years of education, and in many cases, only after seven to nine years. Focusing on the early primary school years also will fail to address the needs of one of the segments of the population whose life prospects have broad implications for the health, welfare and prosperity of the next generation – namely, adolescent girls.

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<sup>6</sup> Mehrotra & Vandemoortele, 1997

<sup>7</sup> IDB, 1998; Lopez-Acevedo 2001; Bloom et al 2001



Expanding effective investments at the post-primary level, embracing the EFA notion of “basic education,” is fully consistent with the ambition of achieving universal primary education. Signaling to parents that there are opportunities for children to continue in school, and that the investments in education will have labor market (and other) pay-offs, is essential to creating and maintaining demand for primary education.

Investments at the post-primary level will vary by current country conditions, ranging from creation of post-primary school spaces in countries that have had a tradition of extreme rationing at that level, to demand-side incentives such as scholarships in countries where specific demand-side constraints are preventing children’s participation at older ages.

**Recommendation 3. Strong monitoring of progress in implementing changes and improving education system performance.** Individual donors will most certainly establish their own criteria for country eligibility for FTI disbursements that they approve (no doubt based in part on the guidelines already amply discussed). The Task Force recommends to all donors including as a criterion that the recipient country has begun implementing a system providing and actively publicizing to all parents (and indeed all citizens) fully transparent information about the total and per child level of public education spending community by community and ideally within each publicly managed school as well.

To assist countries to develop the information that parents and communities need, the international community should take certain steps. At the international level, UNESCO’s UIS has a plan for expanding the range of indicators of education system performance, and for strengthening the capacity of statistical agencies within developing countries to collect and analyze data of adequate quality for decision making. These require both human and material resources to implement.

Obtaining and disseminating better information on education sector spending will likely require the intervention of other types of agencies, including the development banks and, potentially, civil society organizations that act as “budget watchdogs.”

**Recommendation 4. Strong monitoring of donor funding and practices.** Donors should commit to a common framework of transparent annual monitoring and reporting of each other’s practices. This can be done through the FTI, in the case of countries included in the initiative, and through the OECD’s DAC more broadly.

**Recommendation 5. In addition to FTI funding on an annual basis for the programs of eligible countries, donors should take immediate steps to provide funding to any country for cash or other transfers to poor households contingent on children’s attendance at school. These programs would ideally be developed and managed by governments, but where that is not immediately possible, could be developed and managed by donors as long as governments agreed.**

The cost of conditional cash transfers that would reach every household with a child that is not now in school would be on the order of \_\_\_\_\_. We recognize that these transfers are likely to work best in situations where the school infrastructure already exists. At the same time, the

experience of countries in Africa with rapidly expanding enrollment following abolition of user fees suggests that a change in the “price” of schooling for households can be the first step in informing the public that basic education is a legitimate national goal, and can help catalyze the demand for schooling which would make governments more accountable for its supply.

In addition to conditional cash transfers, two other interventions that ought to be eligible for FTI funding in any country are:

- School feeding programs, particularly where under-nutrition and food security issues are prevalent. (This is the case for much of Sub-Saharan Africa and South Asia.)
- Girls’ scholarship programs, particularly where discrimination against girls predominates (either at a national or more localized level) and/or the opportunity cost of girls’ participation in post-primary education is a significant demand-side constraint. (This is the case in many parts of South Asia.)

In poor countries support from donors will be required to implement and evaluate such interventions. In middle-income countries, however, such interventions can – and probably should – be undertaken with national funding, including through borrowing from the World Bank or other multilateral banks. Initial start-up loans and grants from donors ought to finance the training and other infrastructure for targeting transfers for poor households, and could be critical for catalyzing development of such programs at the provincial, state and other local government level – particularly in the poorer regions of middle-income countries.

**Recommendation 6. Genuine evaluation to learn what works.** Given the volume of national and donor resources devoted to education, there is an urgent need to better understand how well specific interventions and reforms work to increase enrollment, retention and learning. This can only be done if those who are responsible for setting spending priorities insist on a sound evidence base for that decision-making, and fund the generation and analysis of relevant data. Several recent examples (including the Progres/Oportunidades program in Mexico, small-scale school health interventions, and others) attest to the feasibility and potential for policy impact of rigorous evaluation. We therefore recommend that a minimum of 5 percent of the total financial resources devoted to basic education be applied to evaluation programs that use sound methodologies, and guarantee dissemination of findings, whether they are favorable or not.

One approach to the chronic challenge of evaluation of development programs, in education as in other sectors, is the creation of an independent facility for funding and bringing visibility to the results of rigorous impact evaluation. This facility, which potentially would need support from both foundations and donor governments, would contribute to the "global public good" of knowledge by making funding available for the design and execution of evaluations for a subset of donor-funded projects. An independent, earmarked source of funds could eliminate or reduce the tension between implementation and evaluation, which has hampered evaluation initiatives within the donor agencies themselves. In addition, an independent facility would have the ability to disseminate evaluation findings and make available evaluation data, in a way that internal evaluation units in ways that development agencies are unlikely or unable to do.