

The bedrock of inclusion: why investing in the education workforce is critical to the delivery of SDG4

LESSONS FROM FIVE AFRICAN COUNTRIES

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About the organisations that commissioned this report

ActionAid is a global justice federation working to achieve social justice, gender equality and poverty eradication. It works with over 15 million people in 45 countries, with communities, people's organisations, women's movements, groups and networks, social movements and other allies to overcome the structural causes and consequences of poverty and injustice. ActionAid connects work at community level with broader efforts and struggles for justice to make the greatest contribution towards a just, equitable and sustainable world.

The logo for ActionAid, featuring the word "actionaid" in a bold, lowercase, red sans-serif font.

Education International is the voice of teachers and education workers on the global level. It is the world's largest federation of education unions and associations, representing 32 million educators in nearly 400 organisations in over 170 countries and territories, across the globe. More information on Education International's work in inclusive education and decent work for persons with disabilities can be found [here](#).

The logo for Education International, featuring a blue circular icon with a white stylized figure and the text "Education International" in blue, with "Internationale de l'Éducation" and "Bildungsinternationale" in smaller blue text below.

Light for the World is a global disability and development organisation enabling eye health services and supporting people with disabilities in some of the poorest regions of the world. We break down unjust barriers to unlock the biggest potential! We focus on the poorest and hardest to reach, because they need it most. We aim to change the entire system, because we want our impact to last. We work with partners, because together we are stronger. We work with underserved communities in countries including Burkina Faso, Democratic Republic of Congo, Ethiopia, Kenya, Mozambique, South Sudan and Uganda.

The logo for Light for the World, featuring a yellow circle to the left of the word "LIGHT" in bold black uppercase letters, with "FOR THE WORLD" in smaller black uppercase letters below.

ABOUT THIS REPORT

This report summarises lessons and recommendations from a multi-country study undertaken on behalf of ActionAid, Education International and Light for the World. The study looked at the current state of play, and the realistic requirements for investing in an education workforce that can support disability-inclusive education systems in Ethiopia, Malawi, Mozambique, Nigeria and Tanzania.

Investing in the education workforce is the bedrock of inclusion and critical to ensuring that all children, especially those with disabilities, enjoy their right to education. Well-trained and qualified teachers are at the forefront of this process, but they cannot work alone. Support from equally well-trained and qualified education leaders, administrators and support personnel (such as therapists, psychologists, community-based rehabilitation workers and specialists in braille and sign language) is key to an education system equipped to respond to children's diverse learning needs. As such, whilst much of this research centres on teachers, acknowledging their fundamental role in the education process, a wider scope of analysis has allowed us to assess the extent to which the broader education workforce is currently equipped to include all children, especially those with disabilities, and deliver on SDG4.

The research included a combination of secondary data, including global and country-specific evidence on inclusive education, and primary data from key informant interviews in all five countries.

This report starts with an introductory background which highlights key evidence from around the world that helped to shape the scope of the country studies. It then presents a series of lessons and recommendations consolidated from across the country studies. It also aims to highlight where the (often serious) gaps in knowledge and data hampered meeting the objectives of the country studies.

The provision of quality, public disability-inclusive education involves system-wide change at all levels. However, some important issues were outside of the scope of the research project, such as strategies to address attitudinal barriers and discriminatory practices, and investments to improve access such as transport and accessible infrastructure. It is also important to note that the study focuses on public basic education and did not include the private education sector.



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FOREWORD

This multi-country study is the result of a collaboration between ActionAid, Education International and Light for the World. The research started in 2019, and was finalised in 2020 as the world is reeling from the effects of a pandemic which has shed harsh light on the effects of decades of chronic underfunding of public services, including education.

The study focuses on Ethiopia, Malawi, Mozambique, Nigeria and Tanzania, and aims to highlight specific obstacles to teacher financing and the impact on the ability of the five countries to deliver disability-inclusive education. It acknowledges the relevance of these issues to many other countries working towards the achievement of Sustainable Development Goal (SDG) 4.

At the height of the Covid-19 pandemic, widespread school closures left an estimated 1.5 billion children learning at home.¹ This brought the essential role of teachers to the fore, highlighting the need to invest more in the teaching profession. Nowhere is this clearer than in sub-Saharan Africa, which currently has the greatest teacher shortages in the world, and where one in three teachers lack adequate training.²

Investing in education systems, and in ensuring adequate numbers of trained and qualified teachers and specialised education support personnel (including those with disabilities), is critical to the realisation of fundamental human rights, social justice and sustainable development. However, as this study shows, even prior to the pandemic, governments across sub-Saharan Africa were struggling to allocate enough funds to meet the wide-ranging education needs of their young and growing populations.

In the space of just a few weeks, the pandemic revealed weaknesses in education systems. In the short term, it showed how under-investment in public education has rendered countries ill-equipped to rapidly mobilise teachers to support the roll-out of emergency distance learning packages during school closures. At the same time, it highlighted longer-term weaknesses which have limited countries' ability to produce the doctors, nurses and other professionals needed to respond to this and any future pandemic.³

According to the 2020 Global Education Monitoring report, which focused on inclusion, an estimated 258 million children and youth are currently out of school. And in sub-Saharan Africa the number of out-of-school children is growing. Children with disabilities are more likely to be out of school than their peers, suggesting they are amongst the hardest to reach.⁴

The chaos wreaked by the pandemic on lives, livelihoods and the global economy has been devastating. It has also precipitated an education crisis, which has disproportionately disadvantaged the most vulnerable, such as children with disabilities, who are among the least likely to access distance learning whilst schools are closed, or return when they re-open.⁵

The extent to which the economic recession will impact on long-term education financing is unclear at this stage. Initial estimates indicate that a combination of slow progress towards targets and increased costs of school re-opening in the context of Covid-19 will make the SDG4 targets even costlier to achieve.⁶ It is critical that progress towards SDG4 is not lost, that investments in education are maintained, and that education systems are built back in ways that are more inclusive and accessible.

This study finds that, more than almost anything else, delivering on the SDG4 promise of inclusive and equitable quality education will require reductions in pupil-teacher ratios. This can only be done by investing in the recruitment and training of adequate numbers of teachers with the skills to adapt their methods to the learning needs of all children, including those with disabilities.

This report summarises some of the key lessons emerging from five in-depth country studies conducted in 2019 and provides a series of concrete recommendations to governments. The recommendations hinge on the core components of the 4S Education Financing Framework, which highlights the need to ensure that:

- The SHARE of national budgets allocated to education reaches the globally agreed targets of at least 15-20%, or 4-6% of gross domestic product (GDP).

- The overall SIZE of government budgets is increased, through progressive domestic resource mobilisation to increase the tax-to-GDP ratio and ensure that the real term amounts represented by this share are adequate to needs.
- The SENSITIVITY or equity of resource allocations (both human and financial) to education benefit vulnerable learners, especially in terms of per capita spending and/or equity funding formulae.
- The conditions are in place for proper SCRUTINY by civil society and citizen groups of education budgets and expenditure, to ensure greater transparency, efficiency and effectiveness of spend against need.

Overall, this report concludes that a well-trained and qualified education workforce (including teachers and education support personnel) is the bedrock of inclusion. Now, more than ever, governments must take all necessary steps to safeguard education spending and create the financial conditions necessary to frontload the investments required for an education workforce capable of supporting the achievement of SDG4 by 2030.

We hope that this report will be helpful to policymakers, practitioners and other stakeholders committed to supporting the education workforce to ensure that no child is left behind.



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GLOSSARY

For the purpose of this study the following definitions were used.ⁱ

Disability	Following the WHO and UNCRPD social definition of disability as an “ <i>evolving concept</i> ” that results from the interaction between an individual with impairments and contextual factors such as attitudinal, social and physical environments, resulting in limitations of one’s ability to participate fully in activities and effectively in society on an equal basis with others. For the purpose of this study we will use the internationally comparable impairment categories - physical, intellectual, behavioural, sensory - unless disaggregated differently within country-specific data.
Education support personnel	Those trained in inclusive education, including itinerant teachers, resource centre staff, specialists in child development (including speech therapists, occupational therapists, physical therapists) and special needs teachers.
Inclusive Education	Following the UNCRPD definition, ⁷ inclusive education is: <ul style="list-style-type: none"> (a) A fundamental human right of all learners and not, in the case of children, the right of a parent or caregiver. Parental responsibilities in this regard are subordinate to the rights of the child; (b) A principle that values the wellbeing of all students, respects their inherent dignity and autonomy, and acknowledges individuals’ requirements and their ability to effectively be included in and contribute to society; (c) A means of realising other human rights, and the primary means by which persons with disabilities can lift themselves out of poverty, obtain the means to participate fully in their communities and be safeguarded from exploitation. It is also the primary means of achieving inclusive societies; (d) The result of a process of continuing and proactive commitment to eliminating barriers impeding the right to education, together with changes to culture, policy and practice of regular schools to accommodate and effectively include all students. <p>For the purpose of this study, the focus is on inclusive education as it relates to disability.</p>
In-service training	Any learning opportunity for teachers who are already certified as per country qualifications and/ or teaching in practice.
Pre-service training	Includes “ <i>recognised and organised, private and public educational programmes designed to train future teachers to formally enter the profession at a specified level of education. Graduates receive a government recognised teaching qualification.</i> ” ⁸
Schools – Inclusive	Schools designed so that children with disabilities attend regular classes with age-appropriate peers, learn the curriculum to the extent feasible, and are provided with additional resources and support depending on need.
Schools – Integrated	Schools that provide separate classes and additional resources for children with disabilities, which are attached to mainstream schools.
Schools – Special	Schools that provide highly specialised services for children with disabilities and remain separate from broader educational institutions, also called segregated schools.
Special needs education	Education for children with additional needs related to difficulties to learn or access education compared with other children of the same age, for example due to disadvantages resulting from gender, ethnicity, poverty, learning difficulties or disability.

i. Unless otherwise noted, the definitions included here are direct text as presented in the World Report on Disability (WHO and World Bank, 2011)

ACRONYMS

EMIS	Education Management Information System
ESDP	Education Sector Development Programme (Ethiopia)
ESP	Education Support Personnel
GDP	Gross Domestic Product
GEQIP-E	General Education Quality Improvement Programme for Equity (Ethiopia)
GPE	Global Partnership for Education
IMF	International Monetary Fund
MoEST	Ministry of Education, Science and Technology (Malawi/ Tanzania)
NESIP	National Education Sector Investment Plan (Malawi)
NGO	Non-Governmental Organisation
NIES	National Inclusive Education Strategy (Malawi/ Mozambique)
NSIE	National Strategy for Inclusive Education (Tanzania)
OECD	Organization of Economic Co-operation and Development
SDG	Sustainable Development Goals
UNCRPD	United Nations Convention on the Rights of Persons with Disabilities
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNICEF	United Nations Fund for Children
WHO	World Health Organisation



Malawi. PHOTO: ACTIONAID

...in most low- and middle-income countries, children with disabilities are more likely to be out of school than any other group of children.

INTRODUCTION

» Despite global commitments, children with disabilities are being left behind

The United Nations' Sustainable Development Goal 4 (SDG4) makes inclusive education an explicit global priority, and all member States have committed to "ensure inclusive and equitable quality education and promote lifelong learning opportunities for all" by 2030.⁹

Yet, in most low- and middle-income countries, children with disabilities are more likely to be out of school than any other group of children.¹⁰ As the 2020 Global Education Monitoring Report noted, "the promise of reaching the furthest behind first is not being kept", and "children with disabilities are particularly at risk of exclusion from education".¹¹

A lack of data, comparable measurements and agreed definitions means that credible global statistics are lacking.ⁱⁱ But the best estimates are that, **in low- and lower-middle income countries, around 40% of**

children with disabilities are out of school at primary level, and 55% at lower secondary level, although these numbers vary enormously between countries.¹² In many lower-income countries, even when children with disabilities do attend school, they are segregated from their classmates, receive a poorer overall quality of education, and are more likely to drop out than their peers.¹³ In 10 low- and middle-income countries, children with disabilities were 19% less likely to achieve minimum proficiency in reading than those without.¹⁴

Far too little is known about how disability intersects with other disadvantages, but some studies suggest that girls with disabilities are among the most marginalised groups in society, as a result of social norms and cultural biases around gender and disability.¹⁵

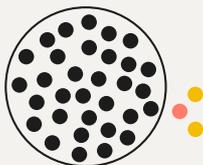
ii. This is also a global issue, as the UNESCO Institute of Statistics noted: "because of the scarcity of national data, it is currently not possible to generate statistics on the status of persons with disabilities with regard to education that are regionally or globally representative"

In 2020, widespread school closures introduced in 194 countries in an effort to contain the spread of the Covid-19 pandemic shed a harsh light on existing inequalities, both revealing and reinforcing patterns of disadvantage and discrimination in access to education. With an estimated 91% of the global school population

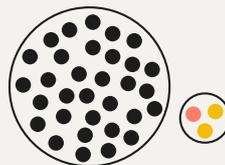
affected by these measures, learners with disabilities are among those most likely to be excluded and face additional setbacks to their education due to factors such as a lack of accessible resources or technology to support continuous remote learning, or a scaling back of specialised support measures.¹⁶

A summary of the evidence on inclusive education

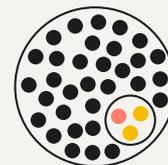
Adapted from Principe T. (2018) Rethinking Disability: A primer for educators and education unions.



Exclusion occurs when students are directly or indirectly prevented from or denied access to education in any form.



Segregation occurs when the education of students with disabilities is provided in separate environments designed or used to respond to a particular or various impairments, in isolation from students without disabilities.



Integration is a process of placing persons with disabilities in existing mainstream educational institutions, as long as the former can adjust to the standardised requirements of such institutions.



Inclusion involves a process of systemic reform embodying changes and modifications in content, teaching methods, approaches, structures and strategies in education to overcome barriers with a vision serving to provide all students of the relevant age range with an equitable and participatory learning experience and environment that best corresponds to their requirements and preferences.

Placing students with disabilities within mainstream classes without accompanying structured changes to, for example, organisation, curriculum and teaching and learning strategies, does not constitute inclusion. Furthermore, integration does not automatically guarantee the transition from segregation to inclusion.

Box 1. What do we mean by inclusive education in this study?

At its simplest, inclusive education means that all children learn together in the same schools. This requires education systems that can adapt to the different learning needs of all students. Inclusive education is widely seen as a philosophical approach to education which ensures that diverse students of all backgrounds learn together in the same classroom, and seeks to transform education systems in order to respond to these different needs - irrespective of abilities or disabilities.¹⁷ For the purposes of this report, however, the authors focus on disability-inclusive education specifically, while recognising the broader understanding of “inclusive education”. Finally, because inclusive education is a process which can take time, the study also aims to situate current efforts by governments as part of a process of moving *towards* inclusive education.

A well-trained and qualified education workforce is the bedrock of inclusion

Poor quality of teaching, inadequate teacher numbers, limited training for workforce development and lack of financing are all cited as significant barriers to the provision of inclusive education.¹⁸

Inclusive education begins with qualified teachers who are provided with the necessary support to address different pupil needs. In many low- and middle-income countries, teachers have no or limited experience of teaching children with disabilities, and are not trained in inclusive teaching or using accessible classroom tools and materials.¹⁹

The recent United Nations Disability and Development Report identified a number of actions needed to achieve SDG4 for persons with disabilities, including providing “*training to teachers and other education specialists to gain knowledge and experience in inclusive education for persons with disabilities*”. However, it found that many teachers lack the “*skills necessary to support children with more challenging learning needs, including those with severe physical or intellectual disabilities, in mainstream classrooms.*”²⁰ This echoes a 2018 study by Education International, which found that 72.5% of teacher union respondents from 43 countries believed pre-service and in-service training on inclusion to be insufficient, leading a small minority of teachers to pay for their own training.²¹

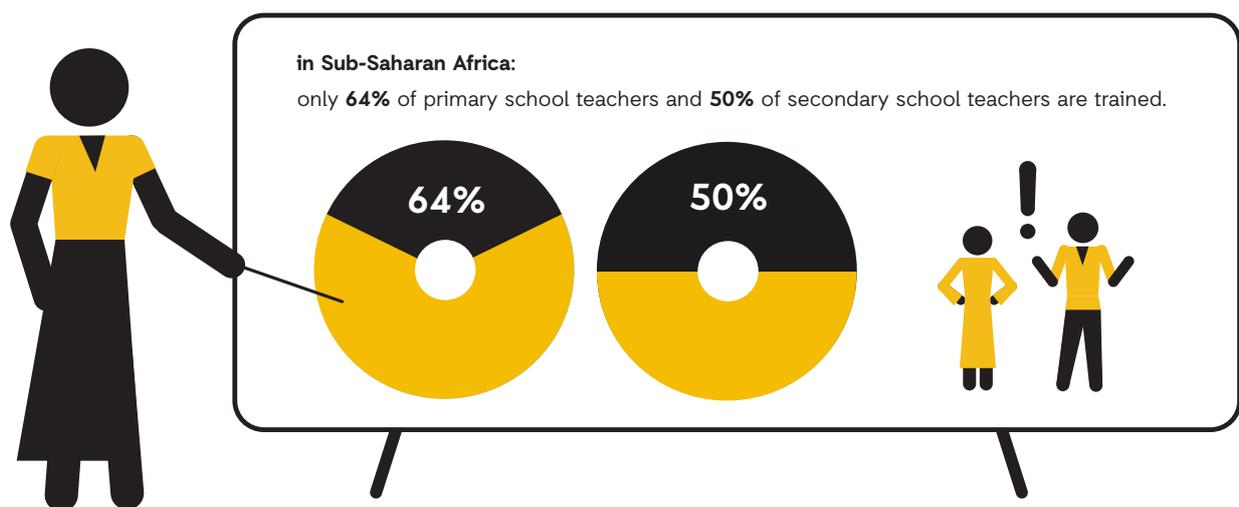
Teacher quality is the most important determinant of the quality of education and learning outcomes at school level,²² and teacher preparation to respond to diversity in the classroom is key to ensuring that all children have a positive learning experience.

As such, it is crucial to ensure that all teachers – new recruits as well as those already in classrooms – are trained in inclusive education.

However, given that in sub-Saharan Africa only 64% of primary and 50% of secondary school teachers are trained, most teachers lack even the most basic preparation to teach, let alone training in inclusive pedagogy.^{iii, 23}

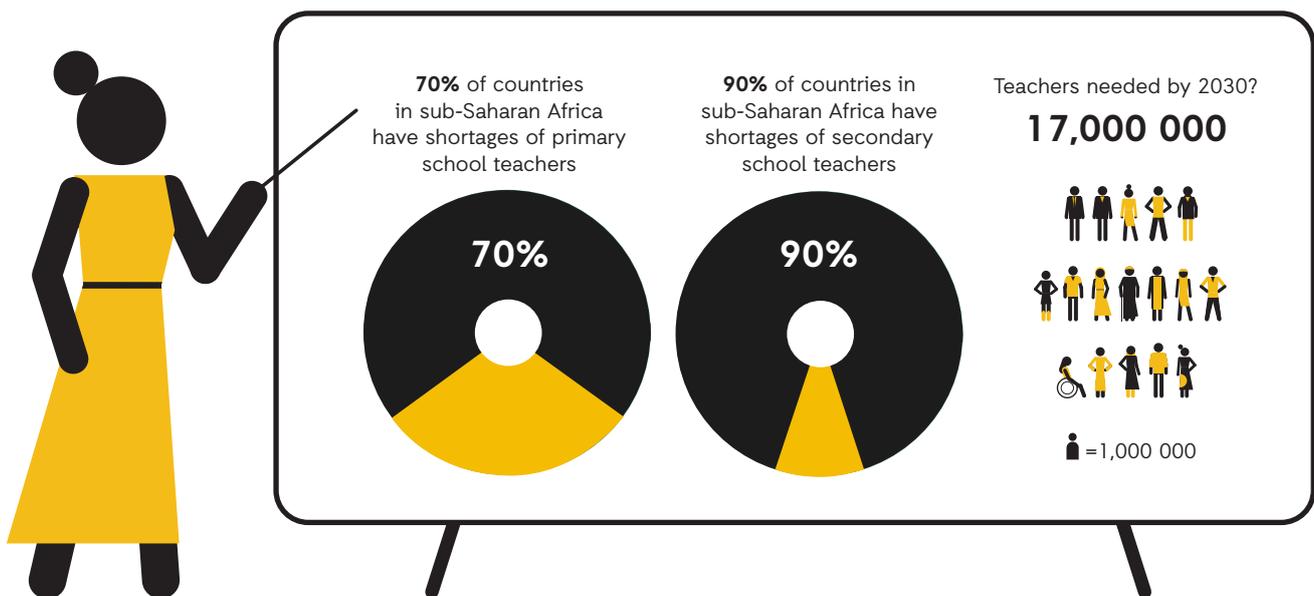
In addition, training available in many lower-income countries is often based on the medical model,^{iv} or on special needs education (which segregates children), rather than the human rights-based framework on which inclusive education is built. Beyond increasing teachers’ skills to modify their teaching strategies, training in inclusion also plays a crucial role in improving teacher attitudes, which are “*central in any reform design to improve inclusion.*”²⁴

Teacher quality is the most important determinant of the quality of education and learning outcomes at school level, and teacher preparation to respond to diversity in the classroom is key to ensuring that all children have a positive learning experience.



iii. Across ten francophone sub-Saharan African countries, just 8% of teachers for grades two and six had received in-service training on inclusive education.

iv. The medical model sets children with disabilities apart from the rest of society (i.e. the child has a “problem” that needs “resolving”). This was the predominant model of thinking around disability until a few decades ago, when the social model of disability shifted understandings of disability away from a charitable welfare-based and rehabilitative approach and towards a social justice, and human rights-based framework – on which inclusive education is based. In many cases, training for teachers is yet to integrate this model fully.



Class size matters

SDG4 calls on countries and development partners to “substantially increase the supply of qualified teachers” by 2030. Not only are teachers a fundamental condition for guaranteeing quality education, but the equity gap in education is exacerbated by the shortage and unequal distribution of teachers, especially in disadvantaged areas.

Currently, in most low-income countries, teachers routinely deal with classes of over 40 pupils with a wide range of abilities, especially in the most marginalised and remote areas where classrooms are more often overcrowded due to huge teacher shortages. According to the UNESCO Institute for Statistics, more than 70% of countries in sub-Saharan Africa face acute shortages of primary school teachers, and 90% have serious shortages in secondary education, the largest teacher gap in the world. **To keep up with population growth, sub-Saharan Africa will need to recruit 17 million new teachers by 2030.**²⁵

As noted in a report commissioned by Education International, *“Teachers need smaller class sizes in order to be able to teach to every student [and practice inclusive education]. Teaching to 35 diverse learners is significantly more challenging and complex than teaching to 16 diverse students”*. The report concludes that **“classroom materials and technologies are useful, but they cannot replace the value of a skilled teacher available to all her/ his students”**.²⁶

Supporting teachers in the classroom is essential

Providing more and better training for teachers is necessary but not sufficient to achieve inclusive classrooms. In many countries, teachers are not only in short supply, but are also *“isolated, and not supported to provide effective teaching and learning”*.²⁷

Teachers require supportive working conditions to deliver inclusive education. This may involve additional resources to provide specially designed learning materials and any necessary classroom adaptation.²⁸ Governments must also develop inclusive curricula that can help teachers break down barriers faced by children with disabilities in the classroom. This involves ensuring that curricula can adapt to the needs of a diversity of learners, while also better representing diversity.

To ensure inclusive education, teachers are critical.

But they cannot work alone. As the Education Commission noted, teachers need leadership and support to be effective and help the learners with the greatest need.²⁹ **Support from specialists in other sectors, such as physiotherapists, occupational therapists, or specialist teachers experienced in teaching children with disabilities, is also essential.**³⁰ Research has shown that these education support personnel play a key role in the learning team necessary to adequately support children and young people with disabilities.³¹

Also critical are adequate remuneration, decent working conditions and incentives for teachers to grow their skills and knowledge and stay in the profession. In early 2020, widespread school closures due to the Covid-19 pandemic resulted in 1.5 billion children³² suddenly being 'home schooled', as governments rushed to design and roll-out distance learning packages. Within days, social media was awash with a surge of appreciation for teachers and the essential role they play, as well as the recognition that this is not always adequately acknowledged or compensated.³³

Governments need to ensure good systems of financial incentives, and improved distribution of teachers

qualified in inclusive education. Education International research from 2018 considered that: *"As teachers' skills and responsibilities increase, so too should their compensation"*.³⁴ Unfortunately, in many low- and lower-middle income countries, teachers are chronically underpaid, with salaries below the average for jobs requiring a similar level of skills. Rural and poor areas are the most understaffed, with few incentives for teachers to work there. For these reasons, Education International and national teachers' unions continue to advocate for improved working conditions to support the shifts in strategies in the classroom needed to deliver SDG4.³⁵



Malawi. PHOTO: KATE HOLT/ACTIONAID



Nigeria. PHOTO: ACTIONAID

STRENGTHENING THE WORKFORCE FOR INCLUSION

➤➤ Six key lessons from five African countries

Each country included in this research faces unique challenges, as reflected in the detailed individual country reports for Ethiopia, Malawi, Mozambique, Nigeria and Tanzania. Nevertheless, some strong commonalities and lessons that can be drawn from across the research, that apply to a range of contexts. This section summarises those generalizable lessons, each accompanied by a set of recommendations to help inform policymaking.

Inclusive education for all can only be achieved when recommendations such as these are developed,

implemented and monitored in an inclusive process involving teachers, persons with disabilities and other relevant stakeholders. As highlighted in this report, *well qualified, trained and supported* teachers and education support personnel (including those with disabilities) play a key role in achieving inclusive education. In order to attract and retain a talented and diverse workforce, and ensure that teacher policy and practice are adequate, genuine social and policy dialogue with teachers and their representative organisations is essential.

Lesson 1. Action is required to mainstream inclusive education commitments into plans, budgets and monitoring

Every child's right to education is firmly established in numerous human rights treaties and international instruments, including the United Nations Convention on the Rights of Persons with Disabilities (UNCRPD)³⁶ which states that all children, regardless of ability, have the same right to develop their potential and access education. Most countries around the world, including the five countries in this study, have signed and ratified the UNCRPD, providing all children the legal guarantee

of the right to education. Such legal guarantees offer the first basis for accountability for inclusive education.^v

All five countries have a national inclusive education policy or strategy, even if a relatively new development in most (see Table 1). However, **Nigeria's** policy, which is still in draft form, is only applicable to the federal level until domesticated by individual States.

Table 1: Inclusive education policy commitments by country

Ethiopia	<p>Commitments in the education sector plan are supplemented by a specific inclusive education policy.</p> <ul style="list-style-type: none"> • The fifth Education Sector Development Plan 2015-20 (ESDP V) includes an explicit goal on children with disabilities, and a much stronger focus on equity overall. • The Inclusive and Special Needs Education Policy, launched in 2012, commits to rolling out inclusive education as an approach. • The new ESDP being developed should include a strong commitment to inclusive education.
Malawi	<p>Strong policy commitments towards inclusive education for children with disabilities.</p> <ul style="list-style-type: none"> • The Ministry of Education, Science and Technology (MoEST) developed the National Inclusive Education Strategy (NIES) 2017-21, although this also commits to some continuation of special needs schools. • The National Education Sector Investment Plan (NESIP) 2020-30 builds on the NIES and includes strong commitments to inclusive education and ambitious targets for disability-inclusion (including teacher training) to be reached by the end of the implementation period.
Mozambique	<p>New policy commitments towards inclusive education bring hope.</p> <ul style="list-style-type: none"> • The National Inclusive Education Strategy (NIES), launched in 2017, provides concrete commitments to inclusion. • The new Education Strategic Plan for the period 2020-29 has now been approved and includes commitments to inclusive education.
Nigeria	<p>Some commitment to inclusive education at federal level but lack of widespread uptake by States.</p> <ul style="list-style-type: none"> • No national sector plan aligned across the 36 States. • The National (Federal) Policy on Inclusive Education 2015 needs to be domesticated by each individual State. Only six (Enugu, Jigawa, Kaduna, Kano, Kwara and Lagos) have adopted aligned inclusive education policies.
Tanzania	<p>Commitments to inclusion over subsequent planning phases have resulted in progress for children with disabilities.</p> <ul style="list-style-type: none"> • Two successive National Strategies for Inclusive Education (NSIE) (2009-17 and 2018-21). • The Education Sector Plan 2016-21 includes commitments to inclusion, and reflects to some extent the inclusive education strategy review.

v. They all also have a national disability law, apart from Nigeria.

Our findings show that the inclusive education policies which were seen as donor-driven, rather than an integral part of broader education planning processes, tended to be more aspirational and vague, with less visibility in the sector. Many inclusive education policies and strategies were missing aspects of costing and resourcing, or budgets were woefully small compared to need. Significantly, none of the costings accompanying the inclusive education strategies took account of the need to train and pay more teachers – a vital factor in ensuring a workforce equipped to support inclusion.

Inclusive education requires system change, with all parts of the system pulling together. When commitments to inclusive education are mirrored in national education sector plans – as in **Ethiopia** and **Tanzania** - there seems to be greater purchase and traction within the sector. This offers particular hope for **Malawi** and **Mozambique**, where new and ambitious education sector plans approved in 2020 strengthen the emphasis on inclusive education and recognise

the need for specific allocations to recruit and train teachers to respond to the education needs of children with disabilities. Alignment between targets, indicators and budget provisions for inclusive education in overall sector plans and inclusive education policies is an important first step.

Despite progress, and increased recognition of the need to mainstream inclusive education into national sector plans, a persistent gap between rhetoric, commitments and delivery is apparent to varying degrees in all countries featured in this study. This is particularly stark when seen through the prism of the education opportunities for children with disabilities. As summarised in Table 2, the limited data available suggests that the majority of children with disabilities remain out of school, across all countries in the study. Furthermore, a parallel ‘special education’ system has continued to some extent, with provision continuing through segregated or special schools, which are largely only in urban areas and privately provided.



Mozambique. PHOTO: NATASHA MULDER/ACTIONAID

Table 2: How many children with disabilities are in school, and in what kind of schools?

<p>Ethiopia</p>	<p>There are an estimated 5 million children with disabilities in Ethiopia and, according to the Ministry of Education 362,820 (7.2%) of them were enrolled in school by 2018/19. Gross enrolment rates for children with disabilities stood at 1.3% at pre-primary, 11% at primary and only 2.8% at secondary school.³⁷ There are also gender gaps - more boys than girls with disabilities are in school - and there are wide variations across States and Woredas (districts). The general policy to move from segregation towards inclusive education has seen more special classes or units emerge in mainstream school settings, although schools for the blind and deaf are still common.</p>
<p>Malawi</p>	<p>Census data indicates that there are 612,749 children with disabilities between 5 and 19 years of age in Malawi, of which 320,854 are boys and 291,895 are girls.³⁸ The 2018/19 Education Sector Performance Report indicates that just 3.3% of children with special educational needs were enrolled in primary and 2.4% at secondary school in 2019.³⁹ Despite the lack of data regarding the nature of these children's special needs, comparing these percentages to total enrolment figures suggests that an estimated 183,916 children with special needs were enrolled in school in 2018/19, of which 174,851 at primary and 9,065 at secondary level. In other words, very roughly 30% of the total number of 5-19 year olds estimate to have a disability.^{vi} Most are still learning in special needs schools, and the NIES openly acknowledges the intention to continue with these segregated schools.^{vii}</p>
<p>Mozambique</p>	<p>Credible data has been hard to find, but the 2017 Census estimated that a total of 171,164 children between 5 and 19 have some form of disability.⁴⁰ Recent data from the Ministry of Education states that around 76,843 children with disabilities (i.e. 45% of the estimated total) are enrolled in school, making up 0.9% of the total school-going population.⁴¹ There has been a strong emphasis on Special Needs Schools^{viii} - primarily provided by specialised private institutions in urban centres - and inclusion has been piloted only in small projects.⁴²</p>
<p>Nigeria</p>	<p>There is no current, credible data on children with disabilities and their education status in Nigeria. In 2008, the Federal Government of Nigeria estimated that around 7% of children had disabilities, and that around 2.7% of these (90,000) were in primary school and 1.8% (65,000) in secondary school.^{ix} However, this data is no longer current and only an estimate. However, in 2018 research found that <i>"the attainment of full inclusion of special needs children in Nigeria's education system has yielded very little success"</i>,⁴³ and there are considerable barriers to the provision of quality, inclusive education for children with disabilities. A recent (unpublished) baseline study by ActionAid found that children with disabilities constituted just 0.1% and 1.25% of total enrolments in sample schools in Sokoto and Lagos States respectively.⁴⁴</p>
<p>Tanzania</p>	<p>According to the 2019 Voluntary National Report, there are an estimated 400,000 school-aged children with disabilities in Tanzania.⁴⁵ In 2018, around 15% of these (60,404) were reported to be enrolled in school.^x On mainland Tanzania there are currently 41 special schools (schools for children with specific disabilities, for example, deaf, blind or autistic) and 561 special needs units within mainstream schools. In addition, 2,485 mainstream primary schools were identified as 'inclusive', representing 15.3% of the total.⁴⁶ In Zanzibar, approximately 28% of government schools were reported to be implementing inclusive education.⁴⁷</p>

Although all five countries still have a long way to go on the journey to achieve genuine inclusion, there has been progress, as schools and the broader education systems move towards inclusive education.^{xi} New education sector plans in **Malawi** and **Mozambique**

show increased commitments and allocations to inclusive education (including for the recruitment and training of teachers), meaning that additional gains for the education of children with disabilities are likely to be made.

vi. Author's rough calculations based on comparison between census data and enrolment data. Clearly more detailed, disaggregated information is required.

vii. This is based on an estimate that only 2.4% of children with disabilities are enrolled, combined with evidence that "most children" are in special schools. For more information, see: Committee on the Rights of Persons with Disabilities. Combined initial and second periodic reports submitted by Malawi under article 35 of the Convention.

viii. Despite the commitment to include children in "ordinary schools", in two consecutive education plans the main interventions have focused on building special schools to support the education of children with disabilities (five special schools were built between 2002 and 2003 - two in Maputo, two in Sofala and one in Zambezia).

ix. Estimate from the Federal Ministry of Education World Data on Education - Nigeria Country Report (2010/11)

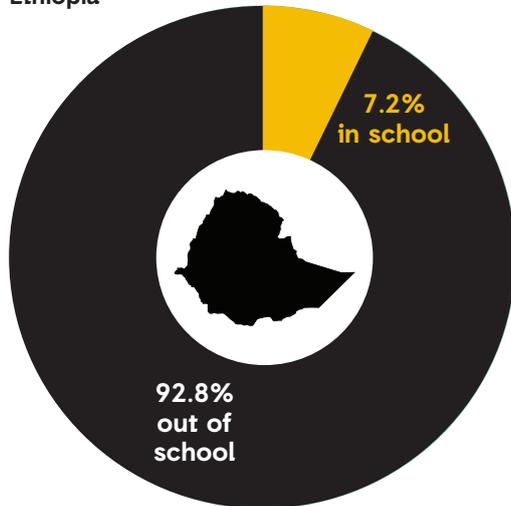
x. The figures for Zanzibar are, however, from 2014 and therefore may be a little outdated, as there are no newer government figures available. Zanzibar Education Development Plan II 2017-22.

xi. A summary of available secondary evidence suggests this, in: Thompson, S. (2017). Education for Children with disabilities.

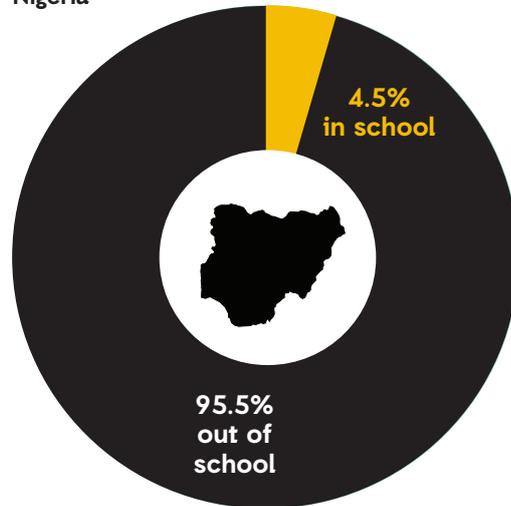
Children with disabilities in/out of school in each country

(estimates based on data in table 2)

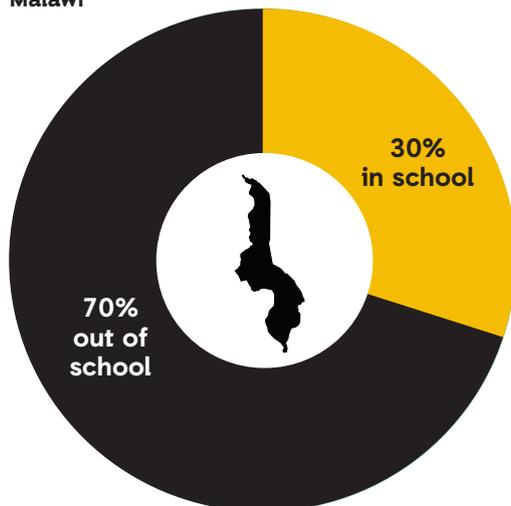
Ethiopia



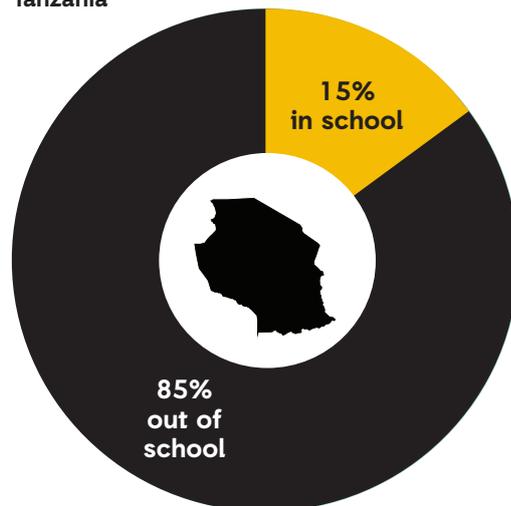
Nigeria



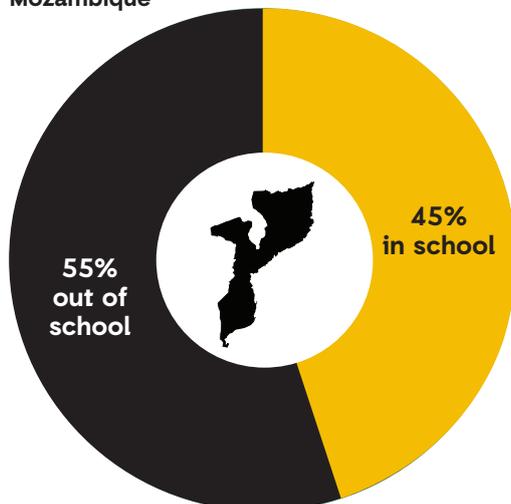
Malawi



Tanzania



Mozambique





Ethiopia. PHOTO: GREG FUNNELL/ACTIONAID



Malawi. PHOTO: FLETCHER SIMWAKA/ACTIONAID

Table 3: Where are countries on the journey to inclusive education?

<p>Ethiopia</p>	<p>Over the last decade, the Government of Ethiopia has moved towards inclusive education, with the goal of educating children with disabilities in mainstream schools. This is visible in successive policy commitments, with consecutive education sector plans bringing an increased focus on disability. However, the Ethiopian Government is still falling well short of their ambitious targets to enrol 75% of all children with disabilities in primary school and 45% in secondary school by 2020.^{xii}</p>
<p>Malawi</p>	<p>The NIES, launched in 2017,⁴⁸ is a significant step in laying out a pathway to improve provision for children with disabilities and build a more inclusive education system. There is still a long way to go to ensure that this is embedded into planning, systems and budgets, and that policymakers champion inclusive education by reviewing existing policies, identifying gaps, implementing accountability measures and ensuring enforcement. For those children with disabilities that <i>do</i> manage to get to school, segregated schooling remains the norm. Nevertheless, the new NESIP 2020-30 includes strong commitments to inclusion across all levels of education. This is evidenced by plans for: recruitment and training of teachers, construction of a Teacher Training Institute of Inclusive Education and significant expansion of the existing resource centre network. The NESIP has ambitious targets for 98% of special needs education learners to be enrolled at primary and 97% at secondary level by 2029.⁴⁹</p>
<p>Mozambique</p>	<p>The 2017 NIES renews Mozambique’s long commitment to supporting children with disabilities to enter mainstream education. This commitment is also reflected in the recently approved Education Strategy Plan 2020-29 which outlines plans to recruit and train an additional 62,515 teachers (10,913 at primary and 51,606 at secondary level) and expand teacher training in innovative, learner-centred and inclusive pedagogical practices.</p>
<p>Nigeria</p>	<p>The 2015 draft policy aimed to “set the minimum standard for the effective implementation of inclusive education in Nigeria.”⁵⁰ But unless individual States translate this into their education plans, and ensure adequate allocation of funds for its implementation, it is likely to remain a commitment on paper only, with little traction.</p>
<p>Tanzania</p>	<p>With strategies in place for over ten years, and commitments to increasing the number of trained teachers, Tanzania is making good strides towards the inclusion of children with disabilities in mainstream education. However, with an estimated 45% of children with disabilities still out of school, and acute teacher shortages, more efforts are required. The Education Sector Plan and the NSIE both end in 2021, providing a key opportunity to ensure adequate funding for strategies to scale up the provision of disability-inclusive education in plans for 2022 and beyond.</p>

To support greater inclusion in mainstream schools, and help teachers embed inclusive education practices, **Ethiopia, Malawi and Mozambique** have all established a number of satellite resource centres and itinerant teacher programmes. However, these tend to be underfunded and inadequate compared to the real needs (see Table 4).



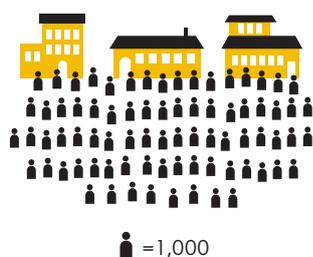
Nigeria. PHOTO: LAURETTE ABUYA/ACTIONAID

xii. ESDP V committed to scaling up to 75% by the year 2020. To meet the target in 2018 this should have reached 61%

Table 4: Funding for specialised resource centres and teachers

<p>Ethiopia</p>	<p>A network of resource centres provide teaching support for children with special educational or medical needs and also supply equipment, materials and assistive devices, support screening and referral, liaise with local schools and communities and provide training on inclusive education and disability-adaptation for teachers in surrounding satellite schools.⁵¹ One study noted that resource centres have increased teacher motivation and improved practices.⁵² Itinerant teachers also play a vital role in supporting inclusive education through the screening processes, implementing children’s Individual Education Plans, and making referrals for additional support. However, in practice they struggle to fulfil this role due to insufficient staff numbers in relation to the workload, leaving gaps in the provision of support to teachers, children and schools. A review of itinerant teachers concluded that, although training and recruitment are well-designed, structures are not scalable due to weak government follow-up, poor monitoring, lack of clear job descriptions, low accountability and insufficient financing.⁵³ One donor-funded project provided itinerant teachers with a small incentive on top of their salary, but these stopped being paid when the project ended in 2017.^{xiii}</p>
<p>Malawi</p>	<p>Malawi, employs itinerant special needs teachers to work alongside other teaching staff (including in resource centres) to support the process of inclusion in the mainstream education system. However, numbers are very low, with teachers often supporting an unmanageable number of schools (regularly more than ten). In 2017, there were 140 primary and 37 secondary school resource centres nationwide.⁵⁴ This is well below need. In fact, using the latest enrolment figures for children with special needs, this equates to roughly one resource centre per 1,039 children.^{xiv} Although the total number of resource centres at secondary level slightly increased by 1.7% between 2017 and 2018, the Government’s own Education Sector Performance Report judges the total number to be too small to have any impact on national goals.⁵⁵ Such challenges are acknowledged in NESIP 2020-30, which includes a target to construct an additional 1,675 centres by the end of 2024 as a means of promoting access for children with disabilities.⁵⁶</p>
<p>Mozambique</p>	<p>In Mozambique there are just three resource centres across the whole country, serving an estimated 76,843 enrolled students with disabilities.⁵⁷ This means there is one resource centre per 25,614 students.^{xv} In most cases, these resource centres have special unit classes with children with a range of disabilities, and who do not necessarily engage with the rest of the school community, operating as a separate entity from the rest of the school and rarely following the curriculum. The new Education Sector Plan mentions the need to strengthen resources for, and responsibilities of, resource centres, but includes no specific budget allocation for this.</p>

In **Mozambique** there are just three resource centres across the whole country, serving an estimated 76,843 enrolled students with disabilities. This means there is **one resource centre per 25,614 students**.



Activities intended to support inclusion fall well below need in all countries, are often ad hoc and are chronically underfunded. This appears to reflect a wider challenge noted in many lower-income countries; that plans to deliver inclusive education are often tokenistic, and that a segregated approach tends to remain the norm in practice. For example, a study of 17 countries conducted by the Global Partnership for Education noted that, while inclusive education was often included in education sector plans, implementation remained “along the lines of segregated or special schooling.”⁵⁸

Recommendations

1. Increase understanding at all levels of government, and within the education sector more broadly, that the concept of inclusive education (as separate from special needs education) needs to be an integral part of all education planning and implementation to ensure that the right to education and SDG4 can be achieved by 2030.

xiii. Personal communication from representative of the Federal Ministry of Education, August 2020

xiv. Authors own calculation, using the total number of children with special needs enrolled in primary and secondary education in 2018/19 divided by the total number of resource rooms at primary and secondary level according to the data available.

xv. Authors own calculations, it should be noted the above figure includes children with development delays and each resource centre may have a number of classrooms, but this is a good illustrative figure for students who require some support through the specialised teaching offer.

2. Raise awareness and champion the implementation of existing national inclusive education policies and strategies within the wider education community.
3. Ensure that commitments to inclusive education outlined in stand-alone education strategies or policies are embedded into general education sector plans and budgets.
4. Ensure that national inclusive education strategies and policies include commitments to transform the workforce to deliver inclusion, and are accompanied by appropriately costed budgets.
5. Establish action plans and accompanying monitoring and evaluation frameworks with SMART indicators to measure progress towards the delivery of inclusive education targets.
6. Support special schools to transition to resource centres, to expand the availability of hubs of expertise providing guidance to teachers and other education personnel for the effective delivery of disability-inclusive education.
7. Ensure that organisations working on disability-inclusive education, disabled people's organisations, academics and professionals working on the ground are considered during education sector planning, to enhance the relevance of plans and costings.

Lesson 2. Lack of robust and accurate data prevents adequate planning and budgeting for inclusive education

Reliable data is imperative at every level of an education system, from robust sector analysis to planning, budgeting and monitoring. In 2018, a stocktake of 51 Global Partnership for Education developing country partners pinpointed the lack of data as a major factor inhibiting effective policy planning.⁵⁹ Yet, as the 2020 Global Education Monitoring Report noted, until recently there has been no accepted way of monitoring children with disabilities in education. With the Washington Group Short Set of Questions on Disability gaining momentum, this is set to change.⁶⁰

To some extent, all five countries have struggled to collect robust data on children with disabilities and their engagement in school. In the case of **Nigeria**, there is a lack of any credible data. Clear progress has been made on this front in **Ethiopia** and **Tanzania**, and to some extent **Malawi**, in recent years and all three now regularly report information on the enrolment of children with disabilities and special needs in annual education statistics.

This study also identified a severe lack of data on the education workforce and its preparedness for practicing inclusion, for example: how many teachers were trained in inclusion; how many of these were in the workforce; or how many were required to deliver inclusion.

Estimates for teachers trained in special needs education were easier to come by, but even these were

often out-of-date and unreliable. With the exception of **Ethiopia**, there was very limited information on the number of teachers trained in inclusive education, and often no information on how these teachers are distributed and where or who they teach. Without such data it is impossible to develop accurate and adequate plans and resourcing for transforming the workforce to practice inclusion.

This lack of data is a reflection of the 'invisibility' of children with disabilities, which is both a consequence and cause of severe exclusion. If they are not visible, it is not possible to plan or budget for their needs. Much more work is needed to ensure the availability of robust data that can genuinely inform policy planning and drive change.

In the long run, the disaggregation of data, in particular by sex, disability and location, will be crucial to better understand intersecting disadvantages such as gender and disability. In Ethiopia, where this data is being collected, it has demonstrated that girls with disabilities are less likely to be enrolled in school than boys. **In Mozambique, recent census data reveals that an overwhelming 69.5% of children and young people with disabilities between 5 and 19 years of age are classified as living in rural areas, information that could better help tailor the distribution of resources, including trained teachers and education support personnel.**⁶¹

Table 5: Where are the gaps in data in the five countries in this study?

Ethiopia	Ethiopia is making good progress and collects data on children with disabilities, disaggregated by sex, through their Education Management Information System (EMIS). Unlike many countries, Ethiopia also has an estimate of the total numbers of teachers trained in special needs education. However, the ESDP V assumption of 5 million children with disabilities ^{xvi} was based on an extrapolation of WHO global estimates of the child population with disabilities (15%). ⁶² This should be addressed in the next education sector plan to provide more robust baseline figures for the total numbers of children with disabilities, not least as it is the basis for enrolment estimates.
Malawi	The 2018/19 Education Sector Performance Report indicates that children with special needs represent just 3.3% of total enrolments at primary school and 2.4% at secondary school. ⁶³ It was not possible to get figures on the total number of teachers in mainstream schools trained in inclusive methods. Given that the new NESIP outlines ambitious plans for both teacher training in inclusive education and the availability of better teacher education data through the Teacher Education Management Information System, this should hopefully change soon. ⁶⁴
Mozambique	The 2017 census indicated that 171,164 children aged between 5 and 19 are estimated to have some form of disability. ⁶⁵ The Ministry of Education states that 76,843 children with disabilities are enrolled in school, making up 45% of all children and young people with disabilities and 0.9% of the total school-going population. ⁶⁶ These figures, whilst encouraging, seem unusually high and it is worth noting that there are currently various slightly different figures in use across documents, a factor which, if left unresolved, may affect planning and budgeting.
Nigeria	There are no figures on which to base planning. As the Global Partnership for Education has noted: <i>“determining the percentage of children with...disabilities [in Nigeria] is next to impossible because official data is non-existent.”</i> ⁶⁷ Overall data on the numbers of teachers trained in inclusive education could not be found, although a recent study focusing on three States (Abuja FCT, Anambra and Kaduna) demonstrated that there are not sufficient special education teachers, and that those who are available are often placed in special rather than inclusive schools. ⁶⁸ Training for existing teachers is also inadequate, ⁶⁹ and there is a lack of aides for teachers to use in an inclusive classroom. ⁷⁰
Tanzania	Currently the inclusive EMIS is used to collect disaggregated disability-related data. ⁷¹ In the academic year 2018/19 a total of 60,404 children with disabilities were reported to be enrolled in school (49,655 at primary and 10,749 at secondary). ⁱ Gender disparities were more pronounced at primary level, whilst at secondary level the reduction in enrolment rates for children with specific types of disability such as intellectual impairment was noticeable. Tanzania also has data on the numbers of teachers trained in special needs education. With the total currently estimated at 2,460, this equates to around one teacher for every 20 children with disabilities enrolled at primary level. ⁷²

Recommendations

1. Ensure standardised, comparable data collection methods that meet international standards by using the Washington Group child-functioning module and Multiple Indicator Cluster Surveys which collect information on disability at the household level, school attendance and other relevant demographic data for planning purposes. Disability data should be disaggregated by sex, level of education, geographical distribution, to better understand intersecting inequalities and the needs of the most vulnerable groups.
2. Strengthen EMIS systems using the UNICEF inclusive EMIS guidance which includes suggestions for rights-based language and appropriate data to inform policy, financing and the allocation of resources. Data should also include information on school infrastructure beyond accessibility features such ramps and water, sanitation and hygiene facilities.
3. Commit to using EMIS to collect better data on the availability of educators and education support personnel, and their preparedness and support to practice disability-inclusive education. Teacher-related EMIS data should gather information on:

xvi. This estimated that there were 33.5 million children of school going age, which implies that there are an estimated five million children with special education needs. See: Federal Ministry of Education ESDPV; 2015 –2020.

active working status, training and certification, geographical distribution, access to qualified and trained education support personnel (e.g. speech

therapists, sign-language instructors, classroom aides) inside or outside of school, physical barriers and the disability status of teaching staff.



Lesson 3. In all countries, teachers do not receive sufficient training to practice inclusion

Truly inclusive education begins with qualified teachers adequately supported to address different pupil needs and ensure a high-quality education for everyone. As such, to meet the needs of a truly inclusive system, all teachers must be trained in inclusive education. No country in this study had anywhere close to the required level of teachers trained in inclusive (or even special needs) education in the workforce. It is counterproductive for a country to develop an inclusive education strategy and not train their education workforce in this as, without action, these commitments will remain “on-paper” only.

Ethiopia was the only country in the study where the majority of teachers had some training in inclusive education, whilst in **Tanzania** efforts are ongoing to increase the overall numbers of teachers trained in special needs *and* inclusive education. The new education sector plans in **Malawi** and **Mozambique** also promise more teacher training in both special needs and inclusive education in the coming decade.

Inclusive education is an evolving concept in all of the countries in this study, and many teachers have not had the opportunity to experience it in practice. This makes both pre-service and in-service teacher training crucial.

Pre-service training is particularly important, since teachers who are trained in inclusive education from the beginning are more likely to be able to identify, assess and respond to diverse learning needs in their classrooms.⁷³ It is also more cost-effective and efficient.⁷⁴

In-service training that prioritises in-depth, structured pedagogical development over time with frequent follow-up has also been shown to be critical.⁷⁵ However, in the countries involved in this research, the focus is often on short trainings, with little systematic integration into ongoing training programmes. These are easier to implement but do not result in what one study

described as “*sufficiently extensive and sustainable change to education systems and cultures*”.⁷⁶

All countries in this study have (to varying degrees) failed to ensure that the curriculum for in- and pre-service training adequately position inclusive education as a core underpinning philosophical approach. Again, **Ethiopia** has made the most progress on this front.

In all countries, there were insufficient incentives for teachers to seek training in special needs or inclusive education, and weak career structures for specialised teachers led to poor retention. In **Ethiopia** and **Nigeria** some special needs teachers - a precious resource in these countries - have been employed as regular teachers.

In all countries, training for education leaders and supervisors is lacking or ad hoc. In **Tanzania** for example, most local government respondents reported they had not received any leadership or management development opportunities related to inclusive education, and only an estimated 8% of School Quality Assurers had been trained in special needs education.⁷⁷ Rolling out training in inclusion for education managers, leaders and supervisors will be critical to ensure adequate support to practicing teachers and quality education for children with disabilities.

The study also looked at the support available to teachers to practice inclusion from Education Support Personnel (ESPs). As Education International has shown, the availability of ESPs with training to support students with disabilities remains a challenge for many education institutions across the world.⁷⁸ For the countries in this study, it was not possible to get any sense of how ESPs were working within the system, or a systematic overview of their roles and funding.

Some countries are investing in training additional cadres to support inclusive education, such as speech therapists, but it is not clear how these will be included

in the human resource structures of the education and health sectors. For instance, **Ethiopia** recently started training occupational therapists and speech therapists, and **Mozambique** trains sign language interpreters, speech therapists, physiotherapists and occupational therapists. In neither case is it clear how they will work, or be accounted for, within the education sector.

Identifying the numbers of teachers with disabilities has also proved challenging. There was no detailed

information on current schemes to support persons with disabilities to enter the teaching profession (except for exemptions related to the mathematics aptitude test in **Malawi**) and no systematic data regarding the number of individuals with disabilities trained or actively teaching in any country. **Ethiopia** was the only country reporting information on the number of teachers with special needs enrolled in Colleges of Teacher Education, a figure which stood at 290 in 2018/19.⁷⁹

Table 6: What are countries doing to train teachers in inclusion?

Ethiopia	<p>There have been sustained efforts in recent years to ensure that all teachers have some training in inclusive /special needs education, and that pre-service training has elements related to this. Ethiopia was one of the only countries where teacher training for special needs education could be estimated accurately. In 2018, an estimated 3,225 primary school teachers had been trained in the degree-level special needs education qualification, amounting to just 1% of the national workforce.⁸⁰ However almost 100,000 primary teachers and around 17,000 secondary teachers had either completed, or were in the process of completing, relevant diploma and degree-upgrading summer programmes.⁸¹ One study noted that a strong teacher training programme had resulted in a remarkably swift shift in attitudes on the potential support that inclusive schools can provide.⁸² However, there were reports of teachers specifically trained to support inclusion not being hired, due to unclear qualification requirements, career structures and job profiles for resource centres. In addition, special needs education teachers receive little to no training in the curriculum, limiting their employment opportunities in mainstream schools, so there is still more work to be done in this area.</p>
Malawi	<p>In addition to a limited curriculum and few lecturers in teacher training colleges with knowledge and skills on inclusive education, very few colleges provide training in inclusive methods. Trainee teachers often specialise in supporting specific types of disability, with a view to teaching in special schools for the deaf or the blind. During the first 5 years of implementation, the NESIP 2020-30 aims to ensure 35,000 teachers are trained in inclusive education, 27,500 teachers are trained in the assessment of learners with diverse needs and a further 7,500 in braille, 4,000 in sign language and 2,800 in maintenance of assistive devices.^{xvii} It also plans to establish a Teacher Training Institute of Inclusive Education.</p>
Mozambique	<p>There is very little information or evidence of the number of teachers trained in inclusive or special needs education. Pre-service training has very little content on inclusion, and in-service training is often limited to one-off donor-supported initiatives.⁸³ The new Education Strategic Plan 2020-29 sets out to address this by setting aside around 3% of the total budget for teacher training activities. The three-year operational plan for 2020-22 includes one line item aimed at providing 75% of primary school teachers with training on inclusive methodologies by the end of 2022.</p>
Nigeria	<p>In it is widely assumed that very few teachers are trained in inclusive education, but there is too little data and evidence available to confirm this.</p>
Tanzania	<p>The country needs a total of 4,428 special needs primary school teachers against the current total of 2,460, indicating a shortfall of 44%. At this rate, it would take 15 years to fill the gap, if all other factors remain constant.⁸⁴ A 2018 report from Zanzibar identified a lack of teachers trained in inclusive education as critical in explaining the numbers of out-of-school children.⁸⁵ Whilst it was not possible to ascertain the total numbers of teachers trained in inclusive education per se, the current NSIE has ambitious plans to increase the provision of pre- and in-service training in inclusive education for teachers, school quality assurers and teacher trainers. Meanwhile, the Education Sector Performance Report for 2018/19 notes that an additional 1,075 teachers had been trained in special needs education and 180 teachers with special education needs qualifications were recruited and deployed to teach in special and integrated schools.⁸⁶</p>

xvii. In the next five years the Government of Malawi aims to have 35,000 teachers trained in inclusive education, 27,500 in the assessment of learners with diverse needs, 7,500 in braille, 4,000 in sign language and 2,800 in the maintenance of assistive devices.

Recommendations

1. Guarantee that all teachers are qualified and trained to teach all students, while ensuring the availability of trained and qualified education support personnel who can provide specialised support to teachers (e.g. speech therapists, occupational therapists) to ensure a tailored response to children's diverse learning needs.
2. Ensure teacher training curricula on disability-inclusive education moves away from the medical model to a social and rights-based model of inclusive education.
3. Conduct a system-wide review and reform of initial and continuous professional development and training for teachers and education support personnel to ensure that inclusive education is integrated throughout, rather than as a separate, optional course or module.
4. Provide school leaders and quality assurance staff (e.g. inspectors) with the resources and training necessary to support the delivery of inclusive education.
5. Strengthen the capacity of the education workforce to conduct objective sensory screening (vision or hearing) and provide psychosocial support, or collaborate with health and social development sectors to provide this service.
6. Establish pathways for fluent users of sign language and braille (including people with disabilities) to become teachers and support personnel.

Lesson 4. High pupil-teacher ratios prevent inclusive education in practice

All five countries taking part in this study are affected by dire teacher shortages and very high pupil-teacher ratios. This is highly problematic for managing diverse learning needs and ensuring inclusive teaching. Moreover, aggregate numbers of teachers often mask extreme disparities between regions, with **poorer rural areas generally faring the worst.**

One key conclusion in all five countries is that the implementation of inclusive education will require a significant scaling-up of teacher numbers to reduce teacher-pupil ratios. This, in turn, will require a commensurate scale-up of funding (at least in the short-term).



Tanzania. PHOTO: PAULINA TEVELI/ACTIONAID

All five countries taking part in this study are affected by dire teacher shortages and very high pupil-teacher ratios. This is highly problematic for managing diverse learning needs and ensuring inclusive teaching.

Table 7: Teacher shortages are chronic and dire across all countries

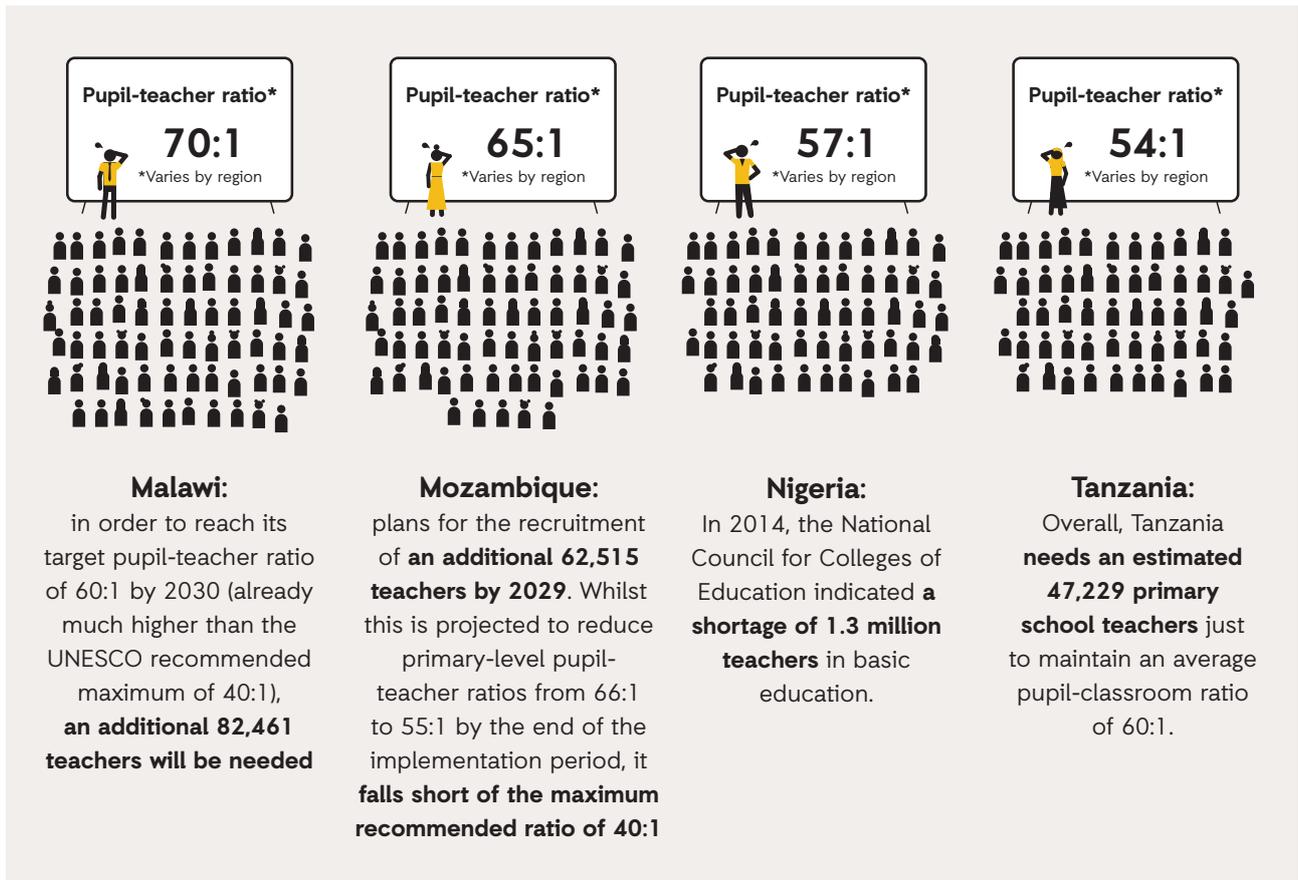
<p>Ethiopia</p>	<p>The Government has taken significant steps to address chronic teacher shortages by reducing pupil teacher ratios, from a high of 67:1 in 2000 (after free education was introduced), to 55:1 in 2011⁸⁷ and 39:1 in 2018/19.⁸⁸ This means that, on average, the Government's own target primary pupil-teacher ratio of 50:1 and the UNESCO recommended maximum of 40:1 have been met. There are significant regional disparities, however, with averages ranging from 24:1 in Addis-Ababa to 46:1 in Oromia and 104:1 in the Somali region.⁸⁹ In 2016 UNESCO estimated that Ethiopia had enough teachers to achieve universal secondary education between 2020 and 2030, but needed to recruit an estimated 7.4% more primary school teachers per year to 2030 to address demand from a growing primary-school age population.⁹⁰ All other factors remaining equal, this would mean recruiting roughly 37,200 additional primary teachers per year.^{xviii} Meanwhile, the Government has continued to make positive strides in ensuring that more teachers are fully trained. In 2013, only around 50% of grade 1-4 teachers were qualified to the national average, but by 2018 the country was reportedly on track to meet the target of 100% trained by 2020.^{xix} However, more needs to be done to ensure an equitable distribution of teachers trained in inclusion/special needs education as the inclusive education strategy noted that <i>"most special needs education graduates end up working as regular teachers"</i>.⁹¹</p>
<p>Malawi</p>	<p>Malawi has one of the "most dramatic teacher shortages in the world", equivalent to 2% of global teacher posts standing empty.⁹² The average pupil-qualified teacher ratio in primary schools was 70:1 in 2018.⁹³ The MoEST estimates that, in order to reach its target pupil-teacher ratio of 60:1 by 2030 (already much higher than the UNESCO recommended maximum of 40:1), an additional 82,461 teachers will be needed, of which 44,205 at primary and 38 256 at secondary level.⁹⁴ In addition, pupil-teacher ratios currently vary significantly across the country, ranging from 45:1 in urban Zomba to 84:1 in Machinga,⁹⁵ and becoming markedly higher in marginalised rural areas. For example, a teacher survey conducted by the World Bank in a sample of 13 schools in rural Blantyre showed that the number of pupils per teacher varied from 43 to 573.⁹⁶ Gaps widen further for teachers trained in special or inclusive education. In 2017 the Government estimated that there were around 1,100 special needs teachers nationwide to cater for about 93,502 children (in education) with special educational needs, representing one teacher for every 85 children at the time.⁹⁷</p>
<p>Mozambique</p>	<p>The overall pupil-teacher ratio of 65:1 is much higher in some provinces, for instance Nampula and Zambézia have ratios of 74: 1 and 72:1 respectively.⁹⁷ Moreover, 25% of teachers in rural areas have no formal qualifications, and only 50% have a basic education. The new Education Strategic Plan recognises the need to reduce pupil-teacher ratios and outlines plans for the recruitment of an additional 62,515 teachers by 2029. Whilst this is projected to reduce primary-level pupil-teacher ratios from 66:1 to 55:1 by the end of the implementation period,⁹⁸ it falls short of the maximum recommended ratio of 40:1⁹⁹ and is also almost twice as high as the aspirational ratios of 25:1 to 30:1 outlined in the NSIE, suggesting a lack of alignment between the two strategies.</p>
<p>Nigeria</p>	<p>The overall average pupil-qualified teacher ratio in primary education is 57:1,^{xxi} although this masks significant disparities. A recent report in five States - Sokoto Jigawa Kano Katsina, Kaduna - reported an average pupil to qualified teacher ratio of 98:1.¹⁰⁰ In the most disadvantaged 25% of schools in Nigeria, the pupil to qualified teacher ratio is at least 150:1.¹⁰¹ In 2014, the National Council for Colleges of Education indicated a shortage of 1.3 million teachers in basic education.¹⁰²</p>
<p>Tanzania</p>	<p>In 2018/19, the average pupil-teacher ratio in primary schools was 54:1, but this varies greatly by region, from 37:1 in Kilimanjaro to 70:1 in regions such as Katavi, Geita, Simiyu and Shinyanga. According to the Education Sector Development Plan there is a shortage of 6,279 pre-primary and 47,229 primary teachers. Although Tanzania has a very high level of qualified teachers (98.3% at primary and 98.7% at secondary level) compared to the other four countries in this study,¹⁰³ more teachers need to be recruited and trained to provide inclusive education.¹⁰⁴ This was highlighted in the 2018 UNICEF study on out-of-school children in Tanzania, which linked high pupil-teacher ratios and overcrowded classrooms to increased drop-out. Overall, Tanzania needs an estimated 47,229 primary school teachers just to maintain an average pupil-classroom ratio of 60:1.¹⁰⁵ In 2018/19 a total of 11,547 teachers (of which 7,928 primary and 3,621 secondary) were recruited,¹⁰⁶ and at the time of writing, the Government had recently announced plans to recruit an additional 12,000 teachers.¹⁰⁷</p>

xviii. Author's rough estimate based on current total numbers of primary school teachers as per the 2018/19 Education Statistics Abstract (i.e. 502,738) and the UNESCO recommended increase of 7.4% per year

xix. The ratio was 48% for male teachers and 63% for female in the 2013 baseline. For grade 1-4 to meet the national standard, there is a diploma level course which must be completed. Latest data shows this will be met by 2002. Taken from: Federal Democratic Republic of Ethiopia (2019) Ministry of Education. Education Statistics Annual Abstract

xx. Please note that these figures are slightly out of date. Committee on the Rights of Persons with Disabilities. Combined initial and second periodic reports submitted by Malawi under article 35 of the Convention, 16 February 2017.

xxi. Based on UNESCO Institute of Statistics headcount basis



Reducing teacher shortages (by recruiting, training and deploying more qualified teachers) will be critical to bring down pupil-teacher ratios and clear the way for inclusion. It is encouraging to see countries making plans for this, as outlined in the new sector plans in **Malawi** and **Mozambique** and recent headlines in **Tanzania** for example.

However any such plans, and their associated budgets, must take account of persistent issues such as low salaries (in relation to the cost of living and as to other similar professions) and high levels of dissatisfaction and turnover amongst teachers.¹⁰⁸ In **Mozambique** for example, according to the national education coalition Movimento de Educação para Todos, around 86% of teachers receive monthly remuneration of between MT 8,908 (US\$ 131) and MT 15,055 (US\$ 223).^{xxii} The Mozambican Workers' Union estimates that a basic expenditure basket for a family of five costs around MT 19,000 (US\$281) per month,¹⁰⁹ meaning that these teachers would need a raise of between MT 10,092 (US\$ 149) and MT 3,945 (US\$ 58) just to meet basic daily living expenses.

Mozambique teachers' salary shortfall



xxii. Movimento de Educação para Todos (2020) based on data from the Organização dos Trabalhadores Mocambicanos and the Instituto Nacional de Estatística and Ministério das Finanças. The Boletim da República de Moçambique/Decreto de 20 de Maio de 2020 confirms salary scales for public sector workers. Figures converted to US\$ using the average exchange rate for 2020.

Recommendations

1. Recruit and train significantly more teachers and education support personnel (including those with disabilities) to address the acute education workforce shortage and reduce pupil-teacher ratios to the international maximum recommended by UNESCO of 40:1 at primary level and 30:1 at secondary level.
2. Attract, retain and motivate teachers and education support personnel by ensuring better pay and incentives. Ensure plans and budgets include adequate allocations for mass recruitment and training in inclusive education and that wage bills include improvements to salary and incentives.
3. In the immediate term, develop and roll out initial and continuous professional development and training that supports teachers to deliver inclusive education whilst continuing to manage large class sizes.

Lesson 5. Inclusive education plans and strategies lack credible costings

A core aim of this study was to identify the extent to which public funding is supporting inclusive education and, specifically, the workforce required to deliver it. However, this proved incredibly difficult to answer on various levels.

Tanzania and **Malawi** had nationwide costings attached to their national inclusion strategies, but did not include estimates for the full workforce transformation required. **Ethiopia's** ESDP V has clear budget lines for teacher development for inclusive education, but not an overall costing. **Nigeria** had a costing for the Federal level which appeared largely aspirational with little way to measure progress, but the strategy does not inform allocations at State level, where significant amounts of the education budget are spent.

Even where costings exist, these appear to be well below what is needed to move to an inclusive system, although there is not sufficient credible relevant data (i.e. on the number of trained teachers required or children to be reached) to identify and quantify this.

When costings are made in national inclusive education plans and strategies it is not clear how these relate to actual spending, or whether they are reflected in annual budgeting cycles.

Better costing models for inclusive education are needed, and these must be based on a clearer overview of actual needs founded on more credible, disaggregated data.

Any costings must be translated into overall and annual education sector budgets. This has recently been taking place in **Malawi** and to a lesser extent in **Mozambique**, who have both launched new education sector plans in 2020. Both of these plans, particularly the Malawi NESIP, set aside budget allocations for inclusive education, including dedicated lines for teacher recruitment and training in inclusion and in specialised skills such as braille and sign language (see Table 8).

Better costing models for inclusive education are needed, and these must be based on a clearer overview of actual needs founded on more credible, disaggregated data.



Ethiopia. PHOTO: EPHREM TAYE/LIGHT FOR THE WORLD

Table 8: Inclusive education costings: a snapshot

<p>Ethiopia</p>	<p>The ESDP V warns that “<i>very small amounts continue to be assigned to non-typical education, which includes special ... education.</i>”^{xxiii} Total amounts spent on inclusive education remain unclear. However, it does allocate approximately US\$ 1.7 million (ETB 55 million) for teacher development for inclusive education, including training of special needs education teachers and the development of education and training curricula, over the course of the five-year period. This amounts to around 0.01% of the total ESDP V budget.^{xxiii}</p>
<p>Malawi</p>	<p>The NSIE estimates some needs to move towards inclusive education, with a costed model attached to the plan. The total financial requirement of MK 22 billion over five years (an estimated US\$ 29 million in the strategy i.e. around US\$ 8 million per year) is likely to be well below real need.^{xxiv} The NESIP 2020-30 underscores the need to increase budget allocations for inclusive education delivery, and allocates around 8.6% of its total ten-year budget to ‘<i>Inclusive Education, Gender and other Cross Cutting issues</i>’. Analysis of the more detailed five-year implementation plan shows that a total of just under MK 10 billion (US\$ 13.3 million), or 0.2% of the total five-year budget, was allocated for various types of training, including braille, sign language and degree-level training in inclusive education. Whilst this is a significant improvement on previous years, it is unlikely to be enough as, in some cases, comparing budget allocations to target numbers of teachers to be trained reveal allocations of just MK 7650 (US\$ 10.21) per person.¹¹¹</p>
<p>Mozambique</p>	<p>There is no estimate or costing of the financing needs for implementing the NIES. Whilst the overall Education Strategic Plan reinforces narrative commitments to inclusion, especially for children with disabilities and special needs, the budget only includes very broad references to a small number of activities to support this. There is one line item for training primary teachers in inclusive, learner-centred pedagogy, which was allocated 1% of the 2020-22 budget, and aims to reach 75% of teachers by the end of 2022.</p>
<p>Nigeria</p>	<p>The inclusive education strategy sets out a general target of increasing education funding for vulnerable groups “<i>by 10%</i>”, but there is no information regarding the starting point for this increase, the timeframe for its achievement, the extent to which it corresponds to the amount required to meet actual needs, nor who is responsible for ensuring it at federal or state levels. As such, this is an impossible target to implement or monitor.</p>
<p>Tanzania</p>	<p>There is a costing model attached to the current NSIE, with allocations to key areas for transforming the workforce to adapt to an inclusive system. The total strategy for 2018-21 was costed at US\$ 153.6 million (US\$ 38.4 million per year) and includes plans to roll out pre- and in-service training in inclusive and special needs education to teachers, teacher trainers and school quality assurers. However, when the plan was approved, only US\$ 61.2 million (39% of the total) was reported to be available. In January 2020, the Global Partnership for Education approved a grant of US\$ 112 million to Tanzania (for the Literacy, Numeracy and Education Support initiative known as LANES II).¹¹² This builds on the previous 2014-18 LANES grant, and is expected to contribute to targets for in-service teacher training, distribution of capitation (per capita) grants and the identification and referral of children with special needs, whilst also building teacher capacity to respond to the learning needs of children with special needs and disabilities and ensuring the availability of accurate, quality and timely education data.</p>

Recommendations

1. Costing exercises for inclusive education should:
 - be conducted in line with plans and policies and include relevant strategies and targets for an increased and better remunerated education workforce for inclusive education provision;
 - take into account current levels of spend against need, as well as financing gaps, for scaling-up inclusive education in a way that recognises the system-wide investments required, most notably in recurrent expenditure;
 - make the case for reforms through detailed, long-term financial plans that demonstrate benefits as well as costs; and
 - be developed collaboratively alongside representatives of the education workforce and unions, as well as other civil society allies (in particular those working on disability-inclusive education and representing people with disabilities), to ensure credibility, accuracy and ownership.

xxiii. Authors own calculation based on figures in the Federal Democratic Republic of Ethiopia (2019) Ministry of Education Statistics Annual Abstract
 xxiv. In 2020 prices over five years, from the. NIES 2017-21



Lesson 6. Despite progress, resources for education are currently insufficient to achieve inclusive education

In all countries in this study, unless substantial new funds become available for education, the level of financing required to transform education systems and the education workforce to deliver inclusion is likely to remain out of reach.

Inclusive education requires system-wide change and a transformation of the education workforce. In the short term this will be costly, but in the long run it would be more cost effective than building two separate systems *and* bring additional benefits associated with more trained teachers on the ground.^{xxv} The achievement of SDG4 commitments is still far off, and it is inescapable that substantial *new* public resources need to be found to train and retain a workforce able to deliver on inclusive education.

Transforming the workforce to move towards system-wide inclusive education requires substantial increases in public budgets, which can be supported by applying ActionAid's "4S Education Financing Framework" for SDG4 (see Box 2). This clearly identifies four principles of education financing to ensure that countries are allocating and spending adequate resources to meet SDG4.

Inclusive education requires system-wide change and a transformation of the education workforce. In the short term this will be costly, but in the long run it would be more cost effective than building two separate systems and bring additional benefits associated with more trained teachers on the ground.

Box 2. ActionAid's 4S Education Financing Framework

ActionAid's 4S framework identifies four clear principles that must be applied to ensure that countries meet the SDG4 twin promises of quality and inclusion:

1. A fair **SHARE** of the budget is spent on education - meeting or exceeding UNESCO benchmarks of 20% of national budget or 6% of GDP - with a particular focus on marginalised groups, including children with disabilities.
2. A good **SIZE** of overall budget is raised through a progressive tax base, maximising the availability of national resources for investment in public services, ensuring that those most able to pay (the wealthiest) support those least able (the poorest) to do so. This also requires macroeconomic policies which can support budget increases, such as reducing debt servicing or limiting austerity policies.
3. Budgets are **SENSITIVE**, with a focus on equity in public expenditure in order to redress broader inequalities in society (such as stipends for the education of children with disabilities, or greater investment in inclusive teachers in poor rural areas).
4. Public **SCRUTINY** of budget expenditure to ensure that funds arrive on time (especially in disadvantaged areas) and are spent effectively. This may require, for instance, enabling civil society groups to have oversight of budget development and expenditure.

xxv. In the long run, it has been noted that setting up separate systems costs more. For example, an OECD report estimated that the average cost of putting students with special educational needs in segregated placements is seven- to nine-times higher than educating them in mainstream classrooms. However, in the short term there is a need for initial up-front investments.

Domestic Financing for Education: *The 4 Ss*

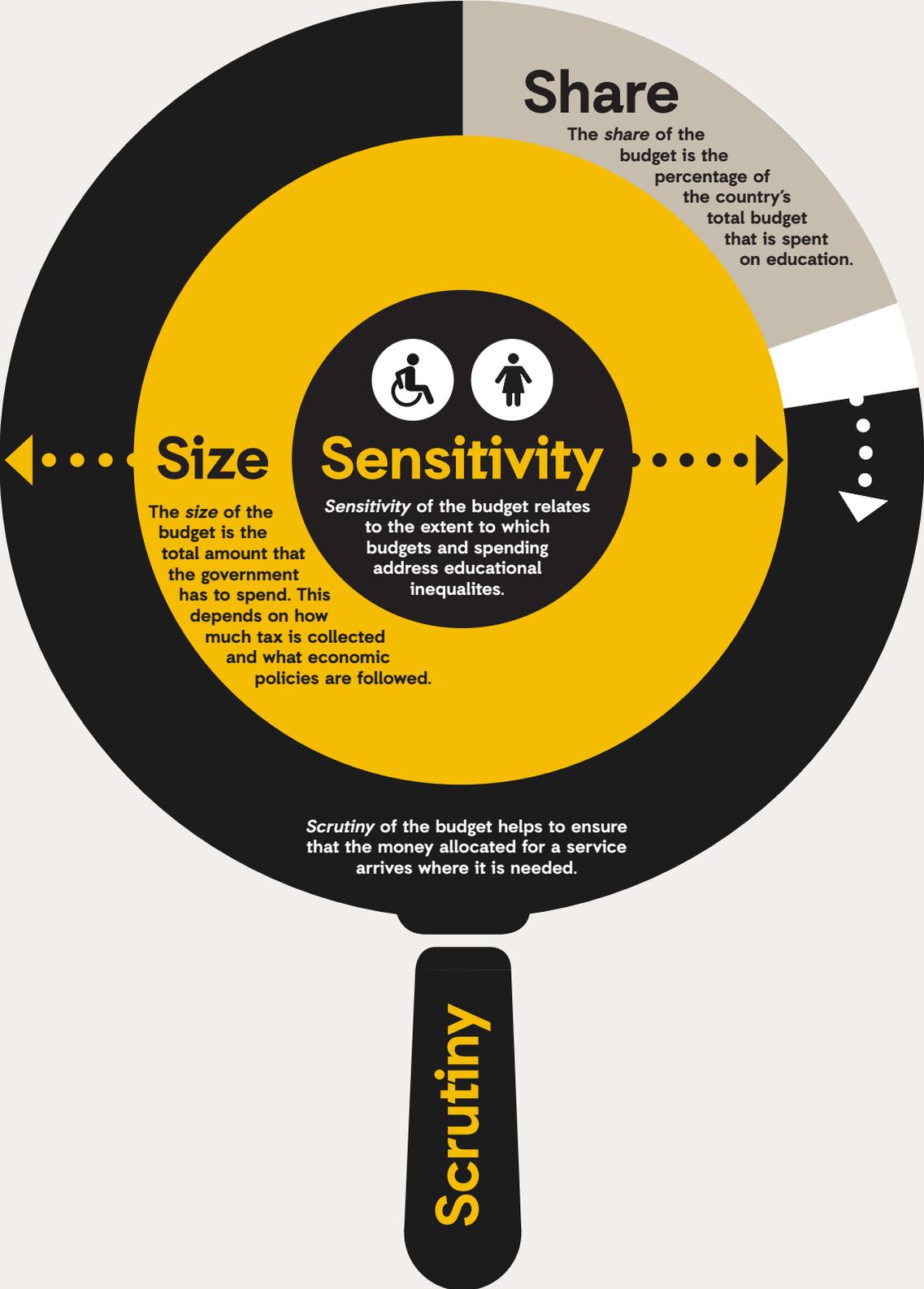


Table 9: Costing, budgeting and monitoring investments for inclusive education

	Costings and allocations	Global targets
Ethiopia	<p>No costings for inclusive education in the inclusive education strategy, some allocations in ESDP V.</p> <p>There are specific allocations for disability-inclusion in the General Education Quality Improvement Programme for Equity (GEQIP-E) funding formula, which addresses intersecting inequalities.</p> <p>Unable to monitor budgets/allocations for estimates of current government spending on inclusive or special needs education.</p>	<p>Very high share of budget (27%) to education. Share of GDP to education is 4.7%.</p> <p>More work needed to raise tax-to-GDP ratios which currently stand at 10.7%</p>
Malawi	<p>The NIES is costed but does not account for full workforce needs.</p> <p>The five-year costed implementation plan accompanying the NESIP makes significant and detailed allocations to inclusive education, including nearly MK 10 billion (US\$ 13.3 million) for teacher training.</p>	<p>Very high share of budget (23%) and GDP (6%) to education.</p> <p>More work on increasing tax-to-GDP ratios (currently 17%) could help sustain the required high levels of finance to scale-up towards 2030.</p>
Mozambique	<p>The NIES includes no costings.</p> <p>It is very difficult to analyse budgets/ government spending on inclusive or special needs education.</p> <p>The three-year operational plan annexed to the new Education Strategic Plan includes top-line allocations to inclusive education but it is difficult to disaggregate amounts specifically aimed at improving teachers' skills to support the learning of children with disabilities. The line dedicated to expanding the practice of inclusive teaching methods constitutes 1% of the total budget for 2020-22.</p>	<p>Relatively high share of budget (17%) and GDP (5.2%) allocated to education, but this is reducing as the budget comes under fiscal restraints from debt servicing.</p> <p>More work on raising tax-to-GDP ratios could help sustain the required high levels of finance to scale-up towards 2030.</p>
Nigeria	<p>No information on financing needs for inclusive education.</p> <p>No budget information on current government spending levels.</p>	<p>Very low share of budget (7%) and GDP (1.5%-2%) to education.</p> <p>Very low tax-to-GDP ratio (7%).</p> <p>More work required to increase tax-to-GDP ratios to scale-up towards 2030.</p>

SHARE: Not enough of public budgets and GDP is spent on education

Evidence suggests that countries with the furthest to go to meet SDG4 require allocations close to or above the upper end of agreed financing benchmarks (20% of national budget and 6% of GDP)¹¹³ to meet the 2030 targets on time, whilst ensuring quality, equity and inclusion.¹¹⁴ This increase is required to ensure

that more trained and well-remunerated teachers are *better able* to deliver commitments to inclusion and quality against the surges in demand anticipated due to booming youth populations in many countries.¹¹⁵ The five countries taking part in this research demonstrate the need for such ambitious targets to meet the SDG4 targets on time, and the consequences of failing to achieve them.

Table 10: Share of the budget for education: is it enough?

Ethiopia	Ethiopia dedicates the second highest proportional share of the national budget to education of any country in the world. For more than a decade this has stayed above 20%, and currently stands at 27%. ¹¹⁶ This has helped the country to reduce class sizes (despite population growth) by training and recruiting more teachers. It is also credited with helping them make the fastest progress towards the SDG4 completion target in sub-Saharan Africa. ¹¹⁷ Despite allocating such a high percentage of its national budget to education, this does not translate into a similarly high percentage of GDP. In 2017, the education budget as a share of GDP stood at 4.7%, a factor linked to the very low tax-to-GDP ratio in Ethiopia. ^{xxvi}
Malawi	In 2018, the Government allocated 23% of its total budget (6% of GDP) to education, ¹¹⁸ demonstrating that education is one of the Government's top spending priorities. However, this prioritisation will be required for some years to come, and has only very recently begun to rise. With debt levels growing, such high allocations look to be under threat. A UNESCO costing model for SDG4 noted that Malawi needs to spend considerably over 6% of GDP on education, in the short term, to meet the twin targets of improving equity and quality while also dealing with a huge new expansion of children coming into schools. ¹¹⁹ There is a lot to do to improve quality and increase completion in a short time.
Mozambique	In 2018, the Government committed 17.2% of its budget (5.2% of GDP) to education. While the country has been close to the upper end of international benchmarks for the last few years, ^{xxvii} more recently the trend has been a decrease, from a high of 20% in 2016. ¹²⁰ Spending on the sector may have been negatively affected by the country's high debt servicing obligations (see Table 11).
Nigeria	In addition to having the largest number of out-of-school children in the world, Nigeria has some of the lowest levels of education spending. ¹²¹ Although it's difficult to know precise spending figures due to a lack of nation-wide data, Nigeria's federal-level education allocation has long stood at well below 10% of the budget, ¹²² and in 2020 at 7.4%, ¹²³ which is estimated to be below 2% of GDP. ^{xxviii} This falls far short of the minimum 15-20% share of the budget and 4-6% GDP benchmark recommended in the SDG4 Framework for Action. In fact, this is half the recommended amount for both indicators, one of the lowest in the world today.
Tanzania	The education budget has experienced a declining share of the national budget, from 20% in 2014 to 15% in 2018, which is a cause for concern with regard to progress towards education targets, and may be due in part to debt servicing obligations. ¹²⁴

As we consider the additional resources needed to deliver disability-inclusive education, the world is reeling from the economic shock brought about by the ongoing Covid19- pandemic. The effect this will ultimately have on the financing of education is still unclear, but according to a recent World Bank paper, even in the most optimistic of scenarios, education spending is expected to stagnate.¹²⁵ More pessimistic forecasts suggest that education budgets may shrink by up to 15% as governments reprioritise spending.¹²⁶

Overall, it is estimated that the pandemic will reduce education spending, especially in low- and middle-income countries, and that in sub-Saharan Africa government reprioritisation of spending is likely to result in reductions in per capita education spending

of around 4.2%.¹²⁷ UNESCO projects that **a combination of slow progress towards SDG4, alongside the additional costs of reopening schools in the context of Covid-19, is likely to increase the overall annual education financing gap** (which stood at US\$ 148 billion) **by between US\$ 30 and 45 billion.**¹²⁸

International aid to education is also expected to drop in response to sharp falls in economic growth

Malawi needs to spend considerably over 6% of GDP on education, in the short term, to meet the twin targets of improving equity and quality while also dealing with a huge new expansion of children coming into schools.

xxvi. Based on UNESCO Institute of Statistics data

xxvii. Based on the latest available UNESCO Institute of Statistics data

xxviii. Calculation carried out by author using the Nigerian Federal Government (2019) Breakdown of 2019 budget proposal.

in major donor countries.¹²⁹ This poses a risk for those countries whose education budgets are still significantly reliant on overseas development assistance. At household level, reductions in income and increases in health spending will leave many families struggling to cover the costs of education. The combined effect of these factors will undoubtedly hit the poorest and most disadvantaged the hardest,¹³⁰ and it is imperative that governments find ways to safeguard education spending. To do this, many countries will need to confront the issue of debt servicing.

Currently, the capacity of many countries to increase the share of their budget for education is under threat. A new debt crisis is on the horizon which threatens the expansion of spending on social services. In

2019, the Jubilee Debt Campaign found that external debt payments by developing countries had almost doubled between 2010 and 2018, from %6.6 to %12.2 of government revenue.¹³¹ Evidence from ActionAid shows a spike in International Monetary Fund (IMF) programmes carrying conditions, and countries struggling to avoid reductions in budgets for essential services.¹³² The enactment of IMF programmes during debt crises has previously been shown to result in pressure on governments to reduce spending on public sector wage bills.^{xxix}

Most of the five countries featured in this research are experiencing some level of debt distress, raising concerns about the availability of budgets required to finance an inclusive education workforce.

Table 11: Debt is threatening commitments to fund inclusive and quality education

Ethiopia	Increasing debt servicing costs currently absorb 12% of all government revenue , and are set to rise to 20% in the next few years, raising concern for Ethiopia’s ability to maintain its impressive gains in education through sustained investment. ^{xxx}
Malawi	Currently spends around 20% of revenue on debt servicing (external and domestic) and is set to continue to do so for some years to come, a situation that will undoubtedly challenge the country’s ability to address its drastic teacher shortages and invest in increasing the numbers of trained personnel to deliver inclusive education. ¹³³
Mozambique	The country has been hit by spiralling debt in recent years, and now spends 27% of its budget on debt servicing , constraining fiscal space. ¹³⁴ Public spending on education as a percentage of GDP had previously increased fairly consistently, from 3.7% in 2004 to 6% in 2012 and 6.5% in 2013. This had allowed for almost 10,000 teachers to be trained and hired annually from 2008 to 2010 - an annual increase of over 10% - with a focus on posting in areas with over-crowded classrooms. ¹³⁵ This helped to reduce pupil-teacher ratios despite rising demand for education and population growth. Recent constraints in fiscal space have had significant consequences for teacher recruitment - the number of new teachers hired in 2018 was below the average for previous years (a 35% decrease relative to 2017). ¹³⁶
Tanzania	In 2019, 19.5% of total government revenue was allocated to debt servicing . Whilst debt servicing has been on the increase, budget allocations to education as a share of GDP have been falling. ¹³⁷ However, as the Jubilee Debt Campaign noted in 2019, it is hard to draw conclusions on the links between debt and social spending, as the Government currently refuses to publish the country’s IMF debt rating. However, fiscal space in Tanzania is currently constrained, which will reduce its ability to continue to expand its education workforce at the required level to deliver on its commitments to reduce pupil teacher ratios and effectively deliver the NSIE.

xxix. For many decades, the prevailing economic wisdom has been antithetical to the kinds of investment required in expanding a quality inclusive education workforce. ActionAid’s analysis showed that a ceiling on wages was an IMF loan criterion for 17 countries in 2003–2005, relating to structural adjustment programmes. (ActionAid (2007) *Confronting the Contradictions: The IMF, wage bill caps and the case for teachers*). In 2011, Oxfam showed this was still impacting decisions, with “*behind the scenes*” pressure on governments to reduce wage bills. (Oxfam International. (2011). *Oxfam submission to IMF 2011 Review of Conditionality and the Design of Fund-Support Programs*.)

xxx. Based on calculations in ActionAid: (2020) *Who Cares? Paying for care work through transforming the financing of gender responsive public services*. The IMF recommends that countries aim for at least “moderate” level of debt risk with a capacity to absorb shocks, which using their figures would mean between 9% and 15% of government revenue – ActionAid took the median of this to identify which countries are “at risk”.

Recommendations

1. Ensure allocations to education constitute at least a 20% share of national budget / 6% of GDP.
2. Frontload the investments required for a workforce capable of delivering inclusive education and achieving SDG4 by 2030.
3. Manage pressure from debt servicing so that repayment does not erode expenditure on crucial public services such as education (in particular due to wage bill containment). This requires the IMF to ensure that its advice to countries does not undermine commitments to human rights and social spending.

SIZE: Countries need to find substantial new domestic resources to fund inclusive education

As the 2014 Global Education Monitoring Report noted, “Countries that require additional teachers will have to increase their overall budgets for teacher salaries”. It went on to state that an extra US\$ 4 billion per year would be required in sub-Saharan Africa to pay the salaries of the additional primary school teachers required by 2020, after taking into account projected economic growth.¹³⁸ Given the chronic shortages in teaching staff in all countries in this study, not to mention the increasing pressure on national budgets from Covid-19 and the impact of debt crises (see Table 11), this presents a huge problem for achieving SDG4.

With only a decade to go until 2030, increasing overall revenues which can be allocated to public services

(including education) will require many countries to increase the availability of domestic resources. Public taxation is the only dependable long-term source of sustainable funding for recurrent budgets to pay teachers. In countries where the tax-to-GDP ratio is so low that overall government revenue is insufficient, this will require new revenues to be raised.

In 2010, the United Nations estimated that a minimum 20% tax-to-GDP ratio was needed to deliver on the Millennium Development Goals.¹³⁹ More recently, research from the IMF and World Bank¹⁴⁰ indicates that tax-to-GDP ratios lower than 15% are insufficient to finance even the most basic state functions.¹⁴¹ In 2017, the average tax-to-GDP ratio in member countries of the Organization of Economic Co-operation and Development (OECD) was 34.2%, whilst in sub-Saharan Africa the average was just 17.2%.¹⁴² In other words, whilst the appropriate level of taxation depends on each country’s characteristics, increased tax capacity is likely to play a significant role in countries’ ability to deliver basic public services and attain the SDGs. Indeed, in 2019 the IMF estimated that most low-income countries would need to spend an additional 15 percentage points of GDP or more to reach the SDG targets, suggesting that increasing tax-to-GDP ratios by 5% in the medium-term (around five years) would be an ambitious, yet realistic way forward.¹⁴³

Taking action to remove harmful corporate tax incentives, tackle tax avoidance, evasion, corruption and illicit financial flows will be key if governments are to raise new funds for education relatively quickly.¹⁴⁴



Tanzania. PHOTO: MAKMENDE MEDIA/ACTIONAID

Table 12: All five countries must make progressive tax reforms to raise the funds needed to deliver SDG4^{xxxi}

Ethiopia	Ethiopia demonstrates the need to focus not only on education spending but also crucially on the overall amount of revenue available. While Ethiopia spends a very large proportion of its budget on education, this cannot bring an end to the education crisis if the overall government budget is very low to start with. Ethiopia's tax-to-GDP ratio declined from 12.7% in 2015 to 10.7% in 2019. ¹⁴⁵ This ratio is very low, even when compared to the sub-Saharan African average of 17.2%. ¹⁴⁶ The IMF has argued that Ethiopia should aim to raise more domestic revenue by eliminating some corporate tax incentives, a strategy which would allow the country to rapidly raise new funds. ¹⁴⁷ One 2014 estimate suggests that tax exemptions amounted to 4.2% of GDP, and allocating 10% of this revenue to basic education (US \$133 million) would pay for an additional 1.4 million children to go to school. ¹⁴⁸ At current rates, this would also be enough to cover the annual salaries of an additional 155,231 entry-level teachers at primary or 118,960 at secondary level.
Malawi	The United Nations estimates that, in order to meet the SDG4 targets, Malawi must spend significantly above 6% of GDP on education, ¹⁴⁹ and this would require additional domestic revenue. New research published by ActionAid in 2020 exploring the revenue potential from just six progressive tax reforms in Malawi, has shown that there is considerable space for significant revenue increase. ¹⁵⁰ The proposed reforms, focusing on taxes on personal and corporate income, property and luxury goods, could translate into a 2% increase in the tax-to-GDP ratio, amounting to an estimated US\$ 135.1 million. If just 20% of this were allocated to education (as per the international benchmark) this would equate to around US\$ 27 million - enough to pay the entry level salaries for 12,199 newly qualified teachers . This equates to around 27% of the total number of primary school teachers needed by 2030, and 35% of the teachers expected to be trained in inclusive education by 2025.
Mozambique	Mozambique had reached a tax-to-GDP ratio of 20% after a recent boost deriving from oil and gas reserves, but as commodity prices tumbled on global markets this fell to 18% in 2018. ^{xxxii} The country must find new funds – and fast - to increase the overall size of its budget. ActionAid's new research into the revenue potential from six progressive tax reforms in Mozambique has shown there is considerable space for significant revenue increase, ¹⁵¹ up to an estimated 6% increase in the tax-to-GDP ratio. This is roughly equivalent to the current percentage of GDP going to the entire education budget. This adds up to around US\$ 701 million, of which just 20% could cover the salaries of around 81,755 newly qualified teachers , allowing the Government to meet or even exceed its targets for teacher recruitment over the next decade.
Nigeria	The very low allocation to education is, in some part, a reflection of a very low revenue collection base which leaves little for social spending. Nigeria's tax-to-GDP ratio stood at 5.7% in 2017, one of the lowest in the world, and the lowest in Africa. In 2018, the IMF estimated that eliminating unnecessary tax exemptions ^{xxxiii} could raise around 2.1% of GDP, accounting for lost revenue of US\$ 8.3 billion. ^{xxxiv} If 20% of this were allocated to education, as per international benchmarks, this would amount to US\$ 1.6 billion in new funding , nearly doubling the entire 2019 federal education budget. ^{xxxv} This could cover the salaries of an estimated 790,422 newly qualified primary school teachers , helping to fill 60% of the 1,320,135 teaching posts projected to be needed across the country.
Tanzania	The current tax-to-GDP ratio is very low, at 11.9%. ¹⁵³ ActionAid estimated that Tanzania lost US\$ 531.5 million to unnecessary tax incentives in 2016, an amount roughly equivalent to 1% of the country's total GDP at the time. ¹⁵⁴ To put this in context, this is nearly three-and-a-half times the total cost of the current NSIE (US \$153 million). 20% of this amount could cover the salaries of 30,213 degree-holding primary school teachers , just over 60% of the total number estimated to be needed across the country.

xxxi. The estimates included in this table, for advocacy purposes, are based on entry-level salaries for teachers and other staff for each country outlined in the latest government sources, and translated to US\$ using the average exchange rates for 2020.

xxxii. ICTD/UNU_WIDER data

xxxiii. It is well established that many incentives in developing countries are "unnecessary" <https://www.oecd.org/tax/options-for-low-income-countries-effective-and-efficient-use-of-tax-incentives-for-investment.pdf>. In Nigeria specifically, most tax incentives have been shown to do little to attract investment: <https://www.taxjustice.net/2018/08/14/are-tax-incentives-in-nigeria-attracting-investment-or-giving-away-revenue/>.

xxxiv. 2.1% of GDP is US\$ 8,342,661,937, based on World Bank data (total GDP in 2018 was US\$ 397,269,616,080).

xxxv. Federal budget from 2018 (year of tax incentives) of 605 billion, converted using the average 2018 conversion to US\$ 1.98 billion. Federal education budget taken from BudgIT (2019). Federal Government 2018 Budget: Analysis and Recommendations.

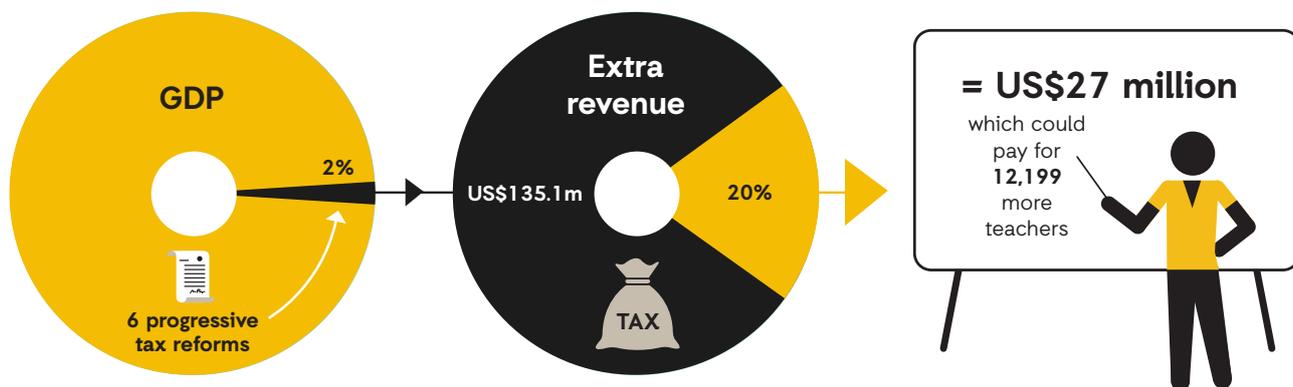
Ethiopia:

One 2014 estimate suggests that tax exemptions amounted to 4.2% of GDP, and allocating 10% of this revenue to basic education (US \$133 million) would pay for an additional 1.4 million children to go to school. At current rates, this would also be enough to cover the annual salaries of an additional 155,231 entry-level teachers at primary or 118,960 at secondary level.



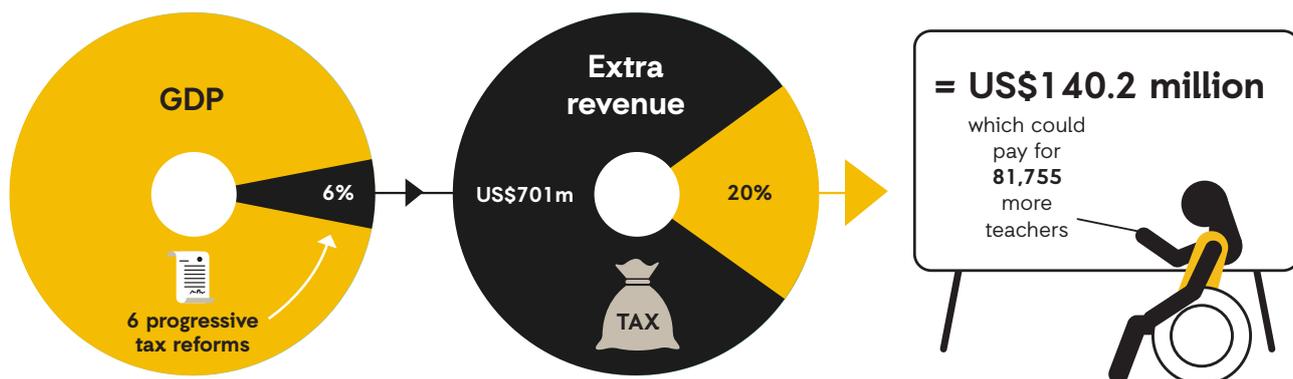
Malawi:

The proposed reforms, focusing on taxes on personal and corporate income, property and luxury goods, could translate into a 2% increase in the tax-to-GDP ratio, amounting to an estimated US\$ 135.1 million. If just 20% of this were allocated to education (as per the international benchmark) this would equate to around US\$ 27 million - enough to pay the entry level salaries for 12,199 newly qualified teachers. This equates to around 27% of the total number of primary school teachers needed by 2030, and 35% of the teachers expected to be trained in inclusive education by 2025.



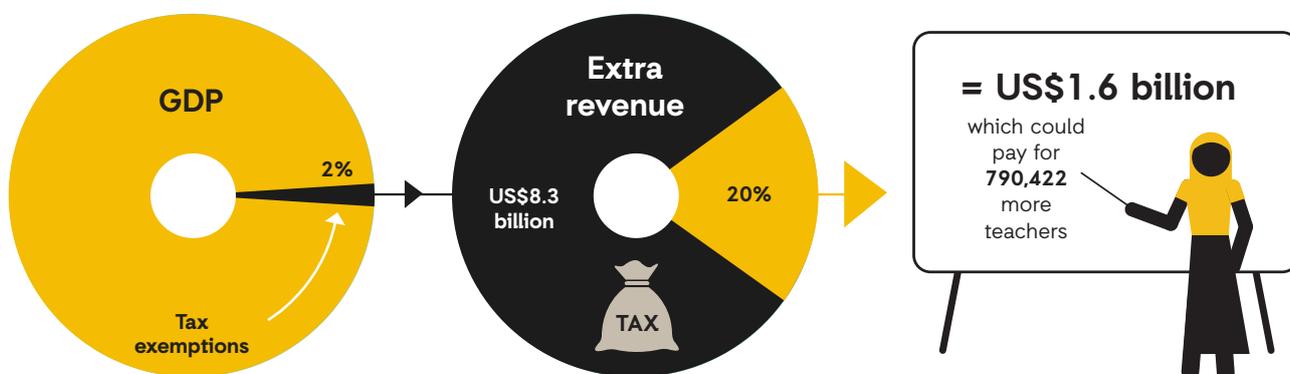
Mozambique:

The revenue potential from six progressive tax reforms in Mozambique has shown there is considerable space for significant revenue increase, up to an estimated 6% increase in the tax-to-GDP ratio. This is roughly equivalent to the current percentage of GDP going to the entire education budget. This adds up to around US\$ 701 million, of which just 20% could cover the salaries of around 81,755 newly qualified teachers, allowing the Government to meet or even exceed its targets for teacher recruitment over the next decade.



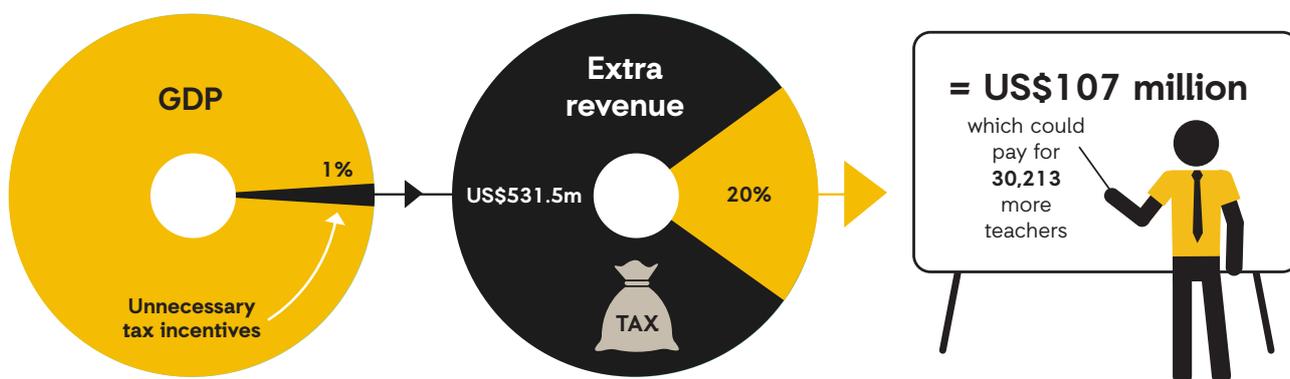
Nigeria:

In 2018, the IMF estimated that eliminating unnecessary tax exemptions could raise around 2.1% of GDP, accounting for lost revenue of US\$ 8.3 billion. If 20% of this were allocated to education, as per international benchmarks, this would amount to US\$ 1.6 billion in new funding, nearly doubling the entire 2019 federal education budget. This could cover the salaries of an estimated 790,422 newly qualified primary school teachers, helping to fill 60% of the 1,320,135 teaching posts projected to be needed across the country.



Tanzania:

ActionAid estimated that Tanzania lost **US\$ 531.5 million** to unnecessary tax incentives in 2016, an amount roughly equivalent to 1% of the country's total GDP at the time. Just 20% of this amount could cover the salaries of 30,213 degree-holding primary school teachers, just over 60% of the total number estimated to be needed across the country.



Recommendations

1. Increase sustainable financing to the education sector by placing education and development goals at the centre of macroeconomic policies and increasing tax-to-GDP ratios through progressive domestic resource mobilisation strategies. These include reducing or eliminating harmful corporate tax incentives, tackling tax avoidance, evasion, corruption and illicit financial flows.

SENSITIVE: Budgets need to actively support equity and inclusion

It is not enough to spend *more* money on disability-inclusive education, education budgets also need to be spent *better* and with greater sensitivity. A greater focus on equity in the distribution of resources— both human and financial – is required, in ways that benefit all learners, including those with disabilities, and ensure an education workforce that is available and able to manage inclusion. This process must start by identifying where resources (including teachers) are required to target the needs of children with disabilities, and support system-wide inclusion.

In all countries, for inclusive education, it proved difficult to assess the equity of teacher deployment in relation to need. This is, at least in part, due to a lack of understanding and data to assess needs (numbers and distribution of children with disabilities and of teachers trained in inclusion). Without more coherent baselines, planning and budgeting for this is impossible.

In all countries in this study, to varying degrees, widespread disparities in geographical allocations are exacerbating pre-existing inequalities. Funding for teaching staff is one way to address inequity in spending allocations, and the other tool governments can use is per capita funding for schools. School

funds need to positively discriminate in favour of the most vulnerable learners, so that everyone can be on a more equal footing. This is particularly true for children with disabilities, who may require additional support (assistive devices, specialised resources, referral to medical care etc.). To do this, it is vital to put equity and inclusion at the heart of governments' financing formulae.

It is not enough to spend more money on disability-inclusive education, education budgets also need to be spent better and with greater sensitivity.



Mozambique. PHOTO: ILAUDA MANALA/LIGHT FOR THE WORLD

Table 13: All five countries need to allocate their budgets more sensitively for inclusion

<p>Ethiopia</p>	<p>The General Education Quality Improvement Programme (GEQIP) provides school-level grants to support improvements. In 2017, additional funds were earmarked for these grants, with all regions receiving 2% of their total allocation to promote the inclusion of children with special needs in mainstream education.¹⁵⁵ In particular this provides supplementary school grants to transform more schools into inclusive education resource centres that support teaching staff to better integrate inclusive education.¹⁵⁶</p>
<p>Tanzania</p>	<p>The only country with a costing attached to its inclusive education strategy, significant resources (around 27% of the total budget) were allocated to incentives for school counsellors, teachers, and support staff, as well as teachers working in satellite centres, in more marginalised areas.¹⁵⁷ That said, it is unclear if and how these allocations have translated into annual budget commitments, as most of the budget lines had no funding available when the strategy was approved. The government capitation grant scheme, which ensures that schools receive an allocation per primary level student, has recently been boosted by an allocation which doubles the size of the grant for each child with disabilities enrolled. If efficiently implemented, this will be a welcome addition to ensuring greater inclusion.¹⁵⁸</p>
<p>Other countries still have further to go:</p>	
<p>Malawi</p>	<p>Inequitable allocations to districts were shown to be critical to inequalities in teacher deployment. However, the rural teachers' allowance - introduced to address these inequities in teacher deployment in rural areas - is now being drawn down by an estimated 85% of teachers across the country. As such, it is no longer incentivising teachers to move to the areas of greatest need, as initially envisaged, but is simply supplementing low teacher wages in general.¹⁵⁹ Moreover, the NIES does not include any allocation for employing additional teachers, with commitments to fund more short-term adaptations to schools, such as accessible school infrastructure.¹⁶⁰ Furthermore, the Civil Society Education Coalition in Malawi noted that whilst MK 260 million (around US\$ 18 million) was allocated to special needs education in the 2018-19 budget, this is far below what is needed to address equity, and amounts to just US\$ 2.64 per child with disabilities.^{xxxvi} Many of these challenges are acknowledged in the NESIP which, in addition to recommending increased allocations to inclusive education overall, includes plans to finalise, disseminate, implement and monitor the reformed, school-based rural allowance scheme and enforce the implementation of primary teacher deployment guidelines for the provision of adequate teachers to the neediest schools.¹⁶¹</p>
<p>Mozambique</p>	<p>Stark inequities in spending across provinces need to be addressed, especially in terms of teaching staff. For instance, despite Zambézia being one of the poorest provinces with the highest numbers of out-of-school children, it has customarily received half the per capita allocations of Maputo, the relatively wealthy capital. In fact, the four provinces with the highest student-teacher ratios are those with the lowest allocations.¹⁶²</p>
<p>Nigeria</p>	<p>Federal funds for special needs education (2% of the budget), come from the Universal Basic Education Commission in part through match-funded grants. However, these funds are <i>"either poorly matched to the needs of the schools, or insufficient in nature."</i>¹⁶³ Furthermore, given the failure of most States to access match grants, even this 2% is not being fully utilised. In 2018, a report by the civil society budget monitoring group BudgIT suggested that only six of the 36 states had accessed these funds.¹⁶⁴</p>

In the current context, given the additional strain the pandemic has placed on government budgets, tackling inefficiencies within education financing systems is more urgent than ever to ensure valuable funds and resources arrive on time to those that need them most.¹⁶⁵

Recommendations

1. Put greater focus on equity in resources - both human and financial - in ways that benefit vulnerable learners, especially in terms of per capita spending and/or equity funding formulae.
2. Allocate resources in ways that address severe gaps in financing for teacher recruitment, training

xxxvi. MK260 million (around US \$18 million) targets the needs of 131,135 learners with special needs (the 2019 target in the NIES). What this means in practice is that the Government is providing *"a meagre per capita MK 1,982.69"* according to the Civil Society Education Coalition in Malawi analysis of the 2019/20 national budget focusing on the education sector.

and deployment to underserved districts with higher pupil-teacher ratios and/or higher numbers of children with disabilities or special learning needs to ensure system-wide change. This might include reviewing compensation, incentives, wage structures and career progression for special needs education teachers.

SCRUTINY: More detailed data on disability and inclusion are required to enable monitoring of budget allocations to inclusive education

Even where funds *are* allocated to inclusive education, improving oversight, scrutiny and accountability is crucial to ensure that budget allocations are properly targeted, arrive in full and on time, and are effectively

and transparently spent.¹⁶⁶ To varying degrees, all five countries have obstacles to tracking budget allocations and expenditure for disability-inclusive education. It was not possible to track total allocations for the workforce required to support inclusive education in *any* of the countries.

Moreover, there are often small allocations that can be traced for “*special education*” that may reinforce the segregation of children with disabilities. This echoes the findings of a study which found that only 31 of a sample of 76 budget documents from low- and lower-middle-income countries had any mention of “*special education*”, and this was often a separate line in the overall education budget, or in budgets other than education, with no plan for integration in the education sector.¹⁶⁷

Table 14: All five countries need to allow their budgets to be more easily scrutinised for inclusion

<p>Malawi Mozambique Tanzania</p>	<p>Only in these three countries could <i>any</i> budget allocations be identified for children with disabilities within publicly available annual budget documents, and these were largely piecemeal interventions in “<i>special needs</i>” education, such as accessible buildings or braille textbooks.</p> <p>The Tanzania NSIE includes detailed allocations for a whole range of inclusive and special needs education initiatives, and the Government includes data on the education for children with disabilities in its Education Sector Performance Reports. However, a 2019 performance review by the office of the Controller and Auditor General raised issues with the lack of information on special needs education activities in annual plans and budgets, as these were largely funded through the LANES grant, leading to potential under-reporting.¹⁶⁸</p> <p>In Malawi and Mozambique, it is encouraging to note that new Education Sector Plans include broad commitments to inclusion, as well as clearly visible allocations for teacher training over the ten-year implementation timeframe, including detailed allocations for training on inclusive pedagogy and the assessment of special needs. Malawi’s plan also includes allocations for teacher training in braille and sign language, and the establishment of a dedicated Teacher Training College for Inclusive Education.</p>
<p>Nigeria</p>	<p>There are no credible, nationwide figures at all for the education sector. This is partly a reflection of the federal nature of Nigeria’s policy planning and budgeting, as education is a responsibility of both federal and state governments.¹⁶⁹ Budget scrutiny is severely hampered due to the varying degrees of transparency between States, with only 15 of the 36 publishing budgets in 2019.¹⁷⁰ This means that, currently, it is not possible to know what is being spent in the education sector in total, let alone understand what is being spent on inclusive education or “<i>special needs education</i>”.</p>
<p>Ethiopia</p>	<p>Public budget documents are not published, although the sector plan does include allocations of funds to support inclusive teaching. Without access to public budget documents it is impossible to assess whether this remained an aspirational budget or was translated into annual budget allocations over the course of the plan.</p>

Recommendations

1. Ensure allocations to disability-inclusive education are clearly visible and identifiable in wider sector plans and budgets and based on evidence of need.
2. Enable greater scrutiny of allocations and expenditure through greater transparency, allowing civil society and beneficiary groups (including disabled persons' organisations) to scrutinise and track spending against budgeted amounts and the needs of different populations.

Building back better for inclusion

With crisis comes opportunity, and against the backdrop of the Covid-19 pandemic and its aftermath we hope that the practical recommendations outlined in this report will support the implementation of sustainable measures, not just to perpetuate the status quo, but to invest in the skilled education workforce needed to build back education systems that are better, more inclusive and leave no child behind.

A Call to Action

Billions of dollars are lost each year to harmful tax incentives, double taxation agreements and debt, while governments lack the funds to recruit, train and deploy the teachers and education support personnel they need to achieve SDG4. With only ten years to go until 2030, Covid-19 must not be an excuse for retrogression. We call on governments to act now to safeguard education financing and invest in the education workforce needed to deliver quality education for all children, including those with disabilities, by:

- increasing the size of their overall budgets through progressive taxation;
- spending at least a 20% share of budget and 6% of GDP on education;
- addressing the amounts lost each year to debt servicing; and
- ensuring funds allocated to education arrive on time and where they're needed most.



Ethiopia. PHOTO: CREDIT: EPHREM TAYE/LIGHT FOR THE WORLD

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ActionAid is a global movement of people working together to achieve greater human rights for all and defeat poverty. We believe people in poverty have the power within them to create change for themselves, their families and communities. ActionAid is a catalyst for that change.

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