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Educational Access for Children Affected by HIV and AIDS

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School Fees -- The Perfect Regressive, Exclusionary System

Imagine that you worked at the Finance Ministry of your nation and your assignment was to find a system to pay for education that would do three things: 1) put as regressive of a burden on the poor as possible; 2) maximize the chances that poor parents of large families only sent their oldest boys – and not their girls – to school; and 3) make sure that the most vulnerable children – including orphans, those with disabilities, and children affected by HIV/AIDS – would have yet one more road block put in their paths.

If that was your assignment, you probably could not come up with a better plan than charging parents a flat fee per child for attending school. This ensures that poor parents will pay a significantly larger portion of their income than more well-off parents for sending the same number of children to school. It ensures that many poor parents of large families will not be able to afford to send all of their children to school, and we know that most will then choose to send their boys and not their girls. And it says to the 15 million children who have already been orphaned by AIDS: your government wants to give you one more hurdle to overcome in your path to a better future.

There is no longer any debate: fees are a barrier that prevent millions of children from going to school. That debate was ended by natural experiments in countries that took the bold step to eliminate fees, and saw a dramatic and sudden surge in enrollment as a result. In Uganda, Kenya, and Tanzania, for instance, enrollment increased dramatically in the very first year after fees were abolished:

- from 3.4 million to 5.7 million students in Uganda in 1996;
- from 5.9 million to 7.2 million in Kenya in 2003; and
- from 1.5 million to 3 million in Tanzania in 2002.

The millions of children who poured into schools overnight in these three countries proved – better than any controlled academic study – that per child fees are a barrier to access, particularly for the poor, girls, rural populations, orphans and other vulnerable children, and children with

¹ I cannot thank all the people who have helped educated me on the connection between education for all and HIV/AIDS, but would nonetheless like to acknowledge the help of Tania Boler, Don Bundy, Dina Craissati, Miriam Temin, Peter McDermott, Cream Wright, Ryann Manning, Paul Zeitz, Brad Strickland, and Father M.J. Kelly.

special needs. Increased enrollment following the elimination of fees was higher in many countries for these disadvantaged groups, including children orphaned by HIV/AIDS.² Eliminating per child fees is thus a crucial and necessary step for opening schools to millions of previously-excluded children.

Formal and Informal Fees are Still Widespread

Despite this sad reality, a recent survey by the World Bank – of education team leaders in 79 countries in 2001 and 94 countries in 2005 – shows that the majority of poor nations still charge per-child fees for primary school, secondary school, or both.³ These can include tuition fees as well as textbook or uniform charges, PTA or community charges, or other types of fees. Of 94 countries surveyed in 2005, only 16 have no fees at all.⁴ Eliminating official fees at a national level is not enough; fees are still collected in more than one-third of countries with a national policy calling for fee elimination.

Fees demand a significant proportion of family income, particularly for the poor. For instance, studies conducted prior to the elimination of fees in several African countries found that:

- In Uganda and Zambia, households spent 33 percent of their discretionary expenditure on education prior to the elimination of fees.
- In Tanzania in 2001, families reported that they spent the equivalent of one to two months' agricultural wages to send just one child to school for a year.
- Poor families in Ghana paid the equivalent of one month's earnings to send one child to school.

According to one six-country study by the United Kingdom's Department for International Development (DIFD), education spending was second only to food expenditures.⁵

Not Narrow Subsidies Alone, but Special Efforts Paired with a Broader EFA Agenda

We may be tempted to conclude that the right policy for opening doors for vulnerable children, children with disabilities, and children affected by HIV/AIDS is simply to call for fee elimination for those children. However, such a policy would be doing them – and all children – a great disservice. What we need instead is a broad commitment to free, quality basic education for all children – with a strong push for special interventions for the most vulnerable groups of children as the only possible way to achieve a true Education for All agenda.

² Raja Bentaouet Kattan, Implementing Free Primary Education: Achievements and Challenges,” Draft report, The World Bank, January 2006, p. 17-19.

³ Surveys were conducted of World Bank education task team leaders in 79 countries in 2001, and 94 countries in 2005, out of a total universe of 144 countries. The surveys asked about the prevalence of fees in public schools in primary education and, in 2005, in lower secondary. (Data for lower secondary were available in just 75 countries). Excluded from the data are countries in which most children attend fee-paying private schools, such as Somalia. Five fee categories are used: tuition, textbooks charges, compulsory uniforms, PTA/community contributions, and school-based activity fees (exam fees, etc.). Kattan, p. 8.

⁴ Kattan, p. 8.

⁵ Ibid, pp. 6-7.

If we are committed to giving children affected by HIV/AIDS a chance to recapture their childhoods and to have hope and opportunity for their futures, then we – whether we are primarily education advocates or primarily HIV/AIDS advocates – must understand that the answer is neither just selective interventions for orphans and other children affected by HIV/AIDS, nor just a generalized movement toward education for all. The only answer is a simultaneous push for free, basic education for all children, with a strong and determined commitment that this goal cannot be reached without focused interventions to help the most vulnerable children, including those with disabilities, the poorest girls, and most certainly orphans and other children affected by HIV/AIDS.

In that light, I would like to make five points:

1. Eliminating Fees is Necessary but Not Sufficient: We Must Look at All the Costs and Benefits that Affect the Decisions of Parents and Heads of Households.

Where education is not compulsory, the decision of whether children attend school falls to parents or heads of households – even, in some sad cases, heads of household who are children themselves. Thus, while there is no question that education is good for the individual child and good for the nation as a whole, the decision of whether or not to send a child to school often falls to parents and heads-of-households who are struggling with the day-by-day rigors of extreme poverty. These parents inevitably make a cost-benefit decision on whether to send some or all of their children to school based on calculations that often must weigh the future benefits of education against the immediate need for those children’s help caring for younger siblings, collecting water and firewood, and even putting food on the table.

Economists would call this a public good problem: when most of the costs fall on the decision-maker, but benefits are distributed widely, the decision-maker will under-invest. In the case of education, many parents choose not to send their children to school despite the widespread benefits for children themselves and for their societies.

In understanding the cost-benefit calculation that parents must make, we must recognize that households face several different types of costs when sending their children to school. First, there are the direct costs of formal and informal fees, which are still charged in the majority of poor countries. Second, there are the costs of transportation or school uniforms. Third, there is the opportunity cost of losing a child’s income or their assistance in such household tasks as collecting firewood, carting water, and caring for younger children – and, for many of the children we are here today to discuss, caring for sick parents or the siblings those parents can no longer look after. Another cost for children affected by HIV/AIDS is that of stigma and discrimination, which can keep children out of school or make their experience more difficult.

Long distances from home to school can be a double burden. First, they increase opportunity costs, because the long walks increase the hours that children must be away from home. Second, these distances impose security costs, as children – particularly girls – may face sexual assault and other dangers on the way to and from school.

We must also remember that when parents or heads of households make a cost-benefit calculation of whether to send their child to school, they look to the benefits as well as the costs. Are the schools safe and girl-friendly? Do they have good teachers? Are the class sizes manageable? Do parents see a benefit in terms of future employment or at least better health outcomes? Eliminating fees so that a child can go to a school that is dysfunctional, with excessive class sizes, no textbooks and absentee teachers may be better than nothing – but it is far, far less than our children deserve.

So where does this leave us? I think it points to the fact that although eliminating fees is crucial and necessary, it is not sufficient. We must think beyond fees to the complexity of costs and benefits mentioned here, and consider strategies that reduce costs for parents as well as strategies that increase the benefits of seeking an education, such as increasing school quality. Cost reduction efforts should go beyond fee elimination to include cash payments, conditional on school attendance, that help make up the opportunity cost of children's lost labor. Programs like *Bolsa Escola* in Brazil and *Oportunidades* in Mexico have shown the success of these type of conditional cash transfers. Such efforts are particularly vital for reaching out to the most vulnerable children, including those orphaned or otherwise affected by HIV/AIDS.

2. We Must Help the Most Vulnerable Children, Including Children Affected by HIV/AIDS, through a Coordinated Effort within a Broader Movement for Education for All.

The approach for helping vulnerable children, children with disabilities, children living as refugees or displaced by conflict, and children affected by HIV/AIDS should not be a narrow focus separate from the broader movement for basic education – but neither should we allow the broader movement for education for all to move forward without taking an honest look at the policies needed to make education a reality for the most vulnerable children. Instead, our best shot for assuring educational access for all children, including those affected by HIV/AIDS, is to join forces in supporting big initiatives that can deliver big results

What does that mean in practice? It means we must embrace the cause of free, quality basic education for every child. It means that all advocacy for eliminating fees should be at the broadest level, emphasizing that school fees are unfair for any family constrained by resources, for girls, and for all children who suffer from any vulnerability.

Yet, it also means that as we embrace free, quality basic education for all, we must hold policymakers' feet to the fire when it comes to the most vulnerable children. It means that

donors and domestic policymakers must understand that that the promise of free, universal education will mean little for rural girls, children from poor families, those affected by disability or conflict, orphans and those affected by HIV/AIDS unless we have special programs that provide extra support – such as stipends, meals, cash payments or special initiatives to deal with discrimination and stigma – to those children who need it help the most.

Closer to home, it means that the education and HIV/AIDS communities need to do a better job of talking to one another. As I look around this room, I notice that very few people here attended the Education for All meetings in Beijing in November. At a meeting we hosted recently at the Council on Foreign Relations in Washington, DC, I saw education and HIV/AIDS or orphans people from the same organization introducing themselves, because they never interact in their day-to-day work. We don't even understand one another's acronyms – EFA, FTI, and UBE, versus ARV, PMTCT, and CABA!⁶

3. We Need a Strong, Bold Global Compact for Education for All.

A strong global compact is one of the most important tools for achieving Education for All. Such a compact would provide an up-front contingent commitment of resources and give poor countries the certainty that if they eliminate fees and take other key steps to increase access, they will receive the financial support from the international community that they need to succeed. Aid must not only be up-front and contingent, but also long-term and predictable, to enable poor countries to take on the large recurrent costs – particularly teachers' salaries – that are necessary for managing dramatic increases in enrollment. Indeed, it is becoming increasingly clear that one major impediment to countries' taking bold steps forward for free, universal education is concern from finance ministries that aid is too short-term and unpredictable to support the predictably recurrent spending involved in bringing on tens of thousands of new teachers.

The Education for All Fast Track Initiative is an important first step in this direction, and is the closest thing we have now to a global compact. The FTI is a “virtual global fund,” which brings together rich countries willing to provide financial resources with poor countries with strong Education for All plans and with political commitment to take the right policy steps. Twenty countries have already earned FTI endorsement and another 25 are receiving technical support through the FTI's Education Program Development Fund. As many as 22 countries could earn full endorsement over the next few years.

Though the FTI is a crucial and important development in the movement to realize the goal of universal education, the fact that the external financing gaps reported for FTI nations tend to

⁶ These are common acronyms used by the education and HIV/AIDS communities, respectively. EFA = Education for All. FTI = Fast Track Initiative, the “virtual global fund” to support Education for All. UBE = Universal Basic Education, which refers to 8-9 years of primary and lower-secondary education. ARV = Antiretrovirals, the medicines used to treat people living with HIV and AIDS. PMTCT = Preventing Mother to Child Transmission of HIV. CABA = Children Affected by AIDS.

underestimate the real need, and that even these inadequate estimates are significantly underfunded, will rob FTI – and with it, the idea of a strong global compact on education – of the momentum it needs to succeed. The world must do far more to mobilize adequate and predictable long-term funding for those nations that have already received FTI endorsement, for those that are on the verge of qualifying, and for those that are capable – with the right support – of developing quality plans and winning FTI endorsement.

There is no question that the \$2 billion that donors now provide for quality basic education is grossly inadequate to support even those developing countries that have already stepped up to the plate by developing strong national Education for All plans. As the recent UK Treasury and DfID analysis correctly finds, poor countries will likely need an additional \$10 billion per year until 2015 to realize free, universal basic education. An additional \$3 billion in 2006-2007 could at least provide a down-payment to signal that the global community is serious about a movement to reach the Millennium Development Goals for education.

Those who advocate for children affected by HIV/AIDS and those who focus on Education for All need to join together to support the call by Gordon Brown to ensure not only that the billions of dollars promised at Gleneagles are actually delivered, but that a substantial portion of these new billions go to support health and basic education. And we should be clear that if the donor community tries to achieve these goals on the cheap, the most vulnerable children will be the ones to lose out, because there will be a dearth of resources for the targeted efforts they will surely need.

Of course, a compact is a two-way street. While donor nations must make a clear contingent commitment of substantial, predictable long-term support for nations with strong EFA-FTI plans, developing nations must take all possible steps to show accountability, transparency and efficiency in the use of new donor funds for universal education.

We also need to be in a position to act quickly to reward those countries that do the right thing, and to make sure fee elimination and the resultant increase in access do not cause class sizes to skyrocket and quality to plummet. When countries eliminate fees, as we've seen in countries like Uganda, Kenya, and Tanzania, they often face a surge in demand that can strain education systems. The international community must step in to provide rapid support to help those countries meet the needs of millions of new students. If we do not, we will leave those countries to fail, and we will be punishing the very leaders that did the right thing.

Supporting leaders who are willing to eliminate fees and take other difficult steps toward Education for All is essential, because the benefits of such decisions often accrue to their successors, while the costs – including substantial recurrent costs, like teachers' salaries – are immediate and ongoing. When a head of state chooses to rise above these constraints and make free, universal basic education a top priority, it is critical that the global community lend its support. Yet to do so, we must understand that such bold efforts happen only when leaders can seize rare – often irreplaceable – political moments. The donor community must be able to

respond quickly to these key political moments, both to support leaders' actions in a timely way, and to encourage more heads of state to follow suit and seize future political moments, knowing that they will be supported in these efforts to push their nations toward free, universal basic education.

This is why the UNICEF-World Bank "Bold Initiative on School Fee Abolition" is so important: because fee elimination must go hand-in-hand with comprehensive policy reform and large inflows of resources, to ensure that increases in enrollment are not followed by declining quality. The Bold Initiative is not a competing initiative to the Education for All Fast Track Initiative. Rather it is a way to provide for a quick response to ensure that countries – both those that are already FTI-endorsed, and those that are moving toward FTI eligibility – have the technical and financial support they need to successfully implement fee elimination. For those countries that are not yet FTI-eligible, this support can help them move quickly toward FTI eligibility.

4. We Should See Education Both as a Means of Helping Children Affected by HIV/AIDS, and as a Window of Hope for Preventing HIV.

Schools can provide a critical support structure for children who have been orphaned or otherwise affected by HIV/AIDS. But at least equally important is its potential to help prevent the spread of HIV.

Schools are not the only answer for HIV prevention, but they are an important component. Studies suggest that simply attending school may serve as a "social vaccine", making young people less likely to put themselves at risk for HIV infection. For instance, a recent study in rural Uganda found that young people some primary schooling were about half as likely as their peers with no education to be HIV-positive, and those with some secondary education were three times less likely.⁷

School-based HIV prevention programs are also valuable, combating myths and providing young people with the knowledge and skills to keep themselves safe. Such programs have been shown to reduce early sexual activity and high-risk behavior.⁸

But we have to be rigorous and ask the hard questions: not just do we need peer education or teacher training, but what kind, and for whom. We've got to get this right.

Moreover, if we're serious about prevention, we have to think about secondary school, particularly for girls. The Millennium Development Goal for universal primary completion is at

⁷ Damien De Walque, "How Does Educational Attainment Affect the Risk of Being Infected with HIV/AIDS? Evidence from a General Population Cohort in Rural Uganda," World Bank Development Group Working Paper, Washington, D.C., 2004

⁸ Douglas Kirby et al., "School-Based Programs to Reduce Risk Behaviors: A Review of Effectiveness," *Public Health Reports*, vol. 109, 1994, pp. 339-61.

once both pathetic and ambitious: ambitious because so many countries are so far from achieving it; but pathetic because it speaks only of primary education, when we know that the prevention of HIV/AIDS is most effective with the help of a secondary education, or at least a basic education (eight to nine years of schooling).

And although we tend to focus on the need to eliminate fees for primary school, we must recognize that secondary school fees also keep children out of school – and, in many cases, put girls in danger. In an exceptional 2003 New York Times article, reporter Marc Lacey movingly captured how the desire to go to school and the difficulty of paying the necessary fees can drive girls into the arms of “sugar daddies” – older men who pay their fees in return for sex. In such a context, even the best intentions to avoid HIV infection can run afoul of the harsh realities of poverty and gender inequity, and girls’ own ambitions and desire to stay in school can lead them to put their lives at risk.

5. We Must Make the Case With Evidence, but Also With Values

We can, and should, marshal the extensive evidence on the benefits of education for economics, health, promoting democracy, etc. But we must not forget that the most powerful argument of all is that every child, everywhere, has the right to go to school.

When Americans saw the Taliban keeping girls out of school, and with the benefit of cameras were able to look into the eyes of those young girls, they did not need studies on the benefits of educating girls to know it was wrong – they just knew.

Even children in the most difficult situations still deserve a childhood. Even children who have been forced from their homes by disaster or violent conflict; who have lost parents or loved ones to HIV/AIDS; who have been forced to struggle every day to survive – even these children deserve to go to school, to learn to read and write, and to have hope for a better future. When we think of the very basics – the bare minimum – that these children deserve, we should ensure that along with food, medicine, safety and a roof over their heads, we consider education a part of that minimum package.

For children affected by HIV/AIDS, education is about hope. Often when people see the children we’re trying to represent, they see the most unlucky, desperate, and destitute children on the planet. We must make them see that these are the most unlucky, desperate and destitute children who still have hopes, dreams, and great futures in front of them. They are future teachers, farmers, doctors and leaders, and we must remember that they are all God’s children, and that a free, quality education should be birthright for each and every one of them.