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Distribution of what? How will we know if we have achieved Education for All by 2015?

by Elaine Unterhalter (Institute of Education, University of London) and Harry Brighouse (Department of Philosophy, University of Wisconsin, Madison)

In 1990 at the Jomtein Conference in Thailand organised by UNESCO, UNICEF, UNDP and the World Bank the 157 governments present agreed to a Declaration, the World Declaration on Education for All that signalled their commitment to achieve Education for All (EFA) by 2000. EFA was not defined succinctly, but was laid out as comprising: universal access to education services ‘of quality’; equity with regard to removing disparities ‘in access to learning opportunities’ for certain groups (girls, women, ‘the underserved’ and the disabled); learning acquisition and outcome in ‘useful knowledge, reasoning ability, skills and values’. The acquisition of learning in a range of different settings was acknowledged, but emphasis placed on primary schooling for children of appropriate age. Partnerships to facilitate learning from early years to adulthood were stressed. (World Declaration, 1990).

By 2000, despite some large scale initiatives by some governments, and the emergence of NGOs as important participants in the movement for EFA, the goals set in 1990 had not been realised. A further meeting at the World Education Forum in Dakar in 2000 led to the governments and NGOs from 164 countries participating agreeing to a Programme of Action to implement the Jomtein Declaration.. At the Millennium summit of the UN two millennium targets were set in education: Gender equity in education by 2005 and Education for All by 2015. A number of UN agencies were to co-ordinate work to achieve this and campaigning NGOs, like the Global Campaign for Education (GCE) have taken on the role of holding governments accountable for these promises (Global Campaign for Education, 2002). Many governments, inter-governmental organisations, and NGOs have linked their programming to these Millennium Development Targets (MDTs). This paper considers not so much whether the targets will be met, nor whether targeting is an appropriate approach in education. An extensive literature on these issues already exists (Watkins, 2000; Tomasevski, 2002; UNESCO, 2002; Black and White, forthcoming, Goldstein, 2003). We are concerned with a different order of question, namely how we will know whether we have gender equity in education by 2005 or EFA by 2015. The paper draws on insights from the capability approach to critique some of the indicators and other measures being used to assess EFA. In the concluding section it offers some thoughts towards the development of an alternative form of evaluation grounded in the capability approach, considered both on its own terms, and in relation to a number of criticisms of the approach.

The paper is divided into three sections. The first section outlines the existing measures used to evaluate progress towards the MDTs and offers some critique of their assumptions, scope and reliability. We highlight how these measures do not address the

full range of concerns represented by the concept 'education for all' and point out how the capability approach presents a range of critiques of assumptions entailed by these measures. The second section assesses some critical engagements with the capability approach by Rawlsians, notably Thomas Pogge, and we suggest how the capability approach might be closer to Rawls than Pogge claims. In the final section of the paper we build from our defence of the arguments in the capability approach to offer some suggestions regarding how an evaluative measure for the MDGs might be developed.

1. Measuring gender equity in education and education for all

Current measures used to assess progress towards gender equity in education and EFA suffer from assumptions regarding the nature of education, gender and equality. On top of this they are often presented in very crude aggregated form, although a number of governments have introduced refinements that try to take account of regional diversity and the needs of individual children. Lastly, the data on which current measures or indicators are based is often of poor quality, and is generally uncorroborated.

The three most widely used measures relating to EFA and gender equity in education are the gross enrolment rate (GER), the net enrolment rate (NER) and the gender gap. The GER is the proportion of all children of school-going age attending school on a given census day. The GER is often over 100% because in many countries there are large numbers of underage children in school (because of inadequate pre-school provision) and overage children in school (because of high levels of repetition). The GER is sometimes disaggregated by gender and district. But the GER cannot measure whether the children in school on the census day attended regularly or only for that day. The net enrolment rate (NER) is a measure of whether children of the appropriate age group 6-11 are in primary schools. The NER is considered a much more refined measure of EFA than GER, and is again often expressed in disaggregated form by district or gender. However, the NER, like the GER, cannot measure whether children attend regularly or not, or their responses to learning and teaching in the school. In addition in many countries children's births are not registered. In these circumstances there is no accurate data on their age on entry into school and hence NER is likely to be based on guesswork. GER and NER are sometimes supplemented by a measure of the gender gap, that is the ratio of enrolment of girls to boys. The gender gap, too is a measure of enrolment not attendance or completion. As a measure of gender equality it is very limited as it only gives information about whether girls are enrolled in school, but gives little insight into the nature of their experience in school. Because of the need to understand not only enrolment, but also participation, in recent years repetition rates and survival rates have been used as a measure of children's progress through the school system. Repetition rates are measured as the proportion of children who repeat grade 1-5 in any given year and survival rates the proportion of children who enrol in grade 1 and who complete grade 5. Data on repetition rates and survival rates can be disaggregated by gender and district.

The collection of data to calculate NER, gender gaps, and repetition rates has been subject to scrutiny over the last ten years, when it became evident that the Education Management Information Systems (EMIS) in many countries was rudimentary. Often

decisions of considerable moment were being taken with inadequate data about the numbers of teachers or children in school and a lack of time series data on which to base predictions about supply and demand (Heynemann, 1997; Samoff, 1994; Carr Hill et al, 1999). Since the 1990s and the extensive development of ICT many countries have begun to put in place better EMIS with improved mechanisms for collecting data at the district level. But data collection and analysis is by no means universally good. Generally the data available to education ministries is only as good as the relations of trust, truthfulness and accuracy that underpin that system

Throughout the 1990s, dissatisfaction by governments, development assistance organisations and NGOs with the imprecision of enrolment based measures of EFA led to a push for more output oriented measures, primarily test scores, and more complex assessments of school resources. For the Dakar meeting on Education for all UNESCO commissioned EFA assessments, which were tests in language, arithmetic and life skills carried out on a representative sample of children in a large number of countries in year 4. The tests were intended to assess learning achievements, and generally found very low levels in the children tested in developing countries against national levels of achievement and in cross national tests (UNESCO, 2000) . The extent to which test scores, either in national exams, or in specially constructed tests administered by outside agencies provide an evaluation of learning rather than just what children have been taught to demonstrate for the test is a hotly debated area. (Goldstein, 2002; Wolf, 2002). While enrolment is a very weak measure of attendance and learning, test scores might be somewhat stronger. However using test scores as an evaluation of quality or as a measure of whether Education for All has been achieved is dubious. Tests cannot avoid the problem that some children might not demonstrate in the test what they know, some learning may not be amenable to testing in this way, and that decontextualised measures of achievement, without any understanding of school contexts, may be open to very biased interpretation. In addition test scores are subject to the problem of aggregation (even when they are disaggregated by gender or location). They provide information about how a school, a district or a country performs, but very rarely is this information used in relation to any other information concerning the social background of an individual child. Despite these limitations, raw test scores have become a key instrument for assessing what is seen as a country's educational performance, and ranking countries against each other or highlighting aspects of what are deemed gender inequality in education and other features of inequity. Thus for example a recently published OECD/UNESCO report on 15 year olds in 43 high and middle income countries found that girls performed better than boys in literacy, while the opposite was true in mathematics, and there were no significant gender disparities in scientific literacy. Girls had higher expectations for their careers than boys.. The performance gap between children from rich and poor families was very marked in the USA, Chile, Argentina, Peru, Brazil, Mexico and Israel (OECD, 2003) The importance given to test score as an index of education quality has often led to education reforms and approaches to resources being linked to school level performance in tests.

The limitations of test scores as a means to assess EFA have resulted in attempts to model more complex measures of educational quality and equality in developing

countries. Kevin Watkins developed the Education Performance Index as a more integrated form of measurement (Watkins, 2000) . The EPI comprises measures of coverage based on the NER, completion, utilising data on the proportion of learners who progress beyond grade 4, and gender equity, based on the gender gap in primary schooling. The EPI ranks each of these measures against a perfect score for that measure (eg. 100% progression beyond grade 4). This was then set alongside a measure of average income levels in a country using World Bank data on purchasing power parity that expresses the number of units of a national currency required to purchase a basket of goods that could be bought for \$1 in the USA (Watkins, 2000,134-141). Watkins acknowledges all the difficulties relating to the quality of data for calculating NER. He also accepts that there are problems with regard to seeing completion rates as a means to indicate learning, and that gender inequality comprises more than a gap in enrolment. Nonetheless these are the best data available. His work was one of the first attempts to integrate different forms of measurement of education quality and consider how these linked to national income. However it is noticeable that for all the achievements of this measure it provides only country level rankings and little information regarding what aspects of education quality are valued in particular settings, and how aggregated country data can provide more refined insights into complex forms of inequality.

The efforts to understand education quality in ways that go beyond enrolment, and that give insights with regard to local level settings have taken two directions. On the one hand a number of researchers have tried to develop measures of education quality based on data collected at the household level. The Demographic and Health surveys (DHS) that have been conducted in 47 developing countries since 1992, with an attempt at representative sampling, do provide information on individuals and the numbers of years in school. The surveys are based on data collected from households and not school data. The latter is sometimes of doubtful value because local education officials may believe that false data showing higher enrolment, might better secure their job. Data collected at the household level might also be fabricated, in that household members might report more or fewer years in school than have in fact been accomplished. But they have no compelling incentives to do this. Household level data on individuals does have the potential to indicate how levels of attendance at school intersect with labour market participation, household income, and some health indicators. Ray Langsten and Tahra Hassan are using the DHS data to develop proximate determinants of basic educational attainment, which they argue will give a clearer guide to policy for UPE (Langsten and Hassan, 2003). They define the proximate determinants of basic educational attainment as ever enrolment in school, timeliness of enrolment (that is enrolment in the appropriate phase of schooling for age), repetition of school years and retention or dropout. They show that an analysis based on these proximate determinants can help explain the poor correlation between NER and grade 4 completion. DHS data can be disaggregated by gender, ethnicity, and region. It overcomes some of the difficulties of establishing date of birth in relation to education system estimates of NER. However the data does not address the problem of what aspects of schooling or education are deemed valuable, nor does it engage with complex issues of race, class or gender inequality that go beyond descriptions of identity. In addition, because it is household level data, it generally fails to represent those who do not live in settled households – nomadic peoples, people who

migrate for work, the homeless. Thus the DHS has severe limitations for providing insights into some social groups who do not fit the pattern of settled household, or who may be hard for surveyors to reach (physically or socially).

The second approach to assembling local level data and developing forms of measurement linked to this has focussed on the school. A number of ways to assess and measure local indicators of education performance have been developed. A critical study of indicators used in the Basic Primary Education Programme in Nepal highlighted confusion and overlap in the indicators collected and stressed the importance of local involvement in the development of indicators for quality education and understanding of the purpose for collection. (Singh, Karki, Carr Hill and Lohani, 2002). A number of studies have stressed the importance of the school as the site for data collection, rather than the education system more widely. Thus a number of approaches to measuring school effectiveness have been developed. Some build from detailed qualitative observations of learners and teachers, for example the model outlined by Helen Craig and Ward Heneveld (Craig and Heneveld, 1996). This has been utilised in a number of different settings beyond the African countries in which it was initially developed. For example in Bangladesh the model has been used in the Primary School Performance Monitoring Project linked to the government's concern with improving quality and detailed research has examined some of the effects of the form of teacher interactions with learners (Unterhalter, Ross and Alam, 2001; Ferdous and Rahman, 2000).

Another approach has been to assemble registers of school needs, taking infrastructural provision as indicative of the education provided. An example of this approach was the South African School Register of Needs surveys (Human Sciences Research Council., 1997;South Africa, 2001). This approach identifies which schools have, for example electricity, indoor or site taps, an office for the principal, and so on. While school based data, like that gathered from households overcomes some of the problems of opacity and aggregation linked to enrolment and repetition data, to date there has been no cross tabulation of data at the level of the school and data at the level of the household. and the individual Thus we do not know whether there is more or less repetition and retention for particular individuals (defined in terms of race, ethnicity, gender or class) in particular kinds of schools or not. We surmise that access to electricity and water, good administration and learning materials will facilitate schooling for all children, but we do not know if these, or other processes, less visible and tangible are the most important in bringing about education for all.

A number of education economists have addressed this issue by modelling schools in relation to inputs and outputs and developing a measure of education production function. In this approach measures are developed for student attainments or school outputs which are seen to be a function of student inputs (say baseline test scores, parental level of education and involvement with children's education, peer group effects) and aspects of school context that can be quite elaborate and score school climate, leadership style, learner motivation. In some contexts, for example the UK, studies of this nature are possible because detailed data is available on individual children, and instruments to measure school context have been developed. There are a

number of internal critiques made of this model, for example the problem of two way causality built into it and the fact that it only takes account of endogenous measures. However, over and above these critiques, is the assumption that an input-output model is an appropriate model of schooling, let alone education; that socio-economic data on children (for example parents' income or education level) provides enough information to take on board assessing complex problems of inequality (particularly the more qualitative dimensions of this), and that the complex processes of school context can be scored through crudely developed instruments.

A different attempt to bring together approaches that looked in detail at school resources, learner performance and human rights is the South African government's Review of Financing, Resourcing and Costs of Education in Public Schools (South Africa, 2003). This report was concerned to develop instruments to ensure inter-provincial and intra-provincial equity in resourcing, noting that education personnel were more equitably distributed within provinces than learning outcomes (in tests). The report recommends investigating a subsidy for non personnel costs linked to poor learners across the country, whether or not they are in 'poor' schools. It also supported the development of an integrated performance monitoring system open to public scrutiny and shows the relationship between levels of resources, socio-economic status of a district and learner performance. This is an important attempt to link together socio-economic information, concern with human rights, pro-poor policies and public accountability that goes well beyond any of the existing approaches to measurement. However there are still problems relating to reliance on test scores as a measure of learner performance. Further how accountability to local demands for education in terms of human rights are negotiated in relation to these recommendations, and how the impetus in the approach towards rights based measures might articulate with other concerns relating to efficiency and fiscal discipline are raised but not solved by this report. Shireen Motala, in commenting on the review points up the need for greater specificity regarding how a level of adequacy of resources and minimum conditions for learning are defined, particularly given historic inequities (Motala, 2003, 9-10). Thus, while the Review is sensitive to a wide range of issues often ignored in discussions of funding formulae, the process of redistribution is bedevilled by only preliminary means to conceptualise redistribution and equality.

We have shown in this section how the current approaches to measuring EFA are particularly problematic. They assume either that education means enrolment in school or achievement in a narrowly constructed test. With regard to gender, the assumption is that gendered identities are descriptive categories of biological difference between children. They do not take account of the intersection of gender with other variables, except district or urban/rural. While this might be possible linked to race and ethnicity were DHS data to be used, this data has not yet been drawn on in complex ways to examine the aspiration towards EFA in the light of features of gendered experience in school taking on board aspects of race, ethnicity and socio-economic status. Lastly, an assumption in the aspiration of EFA is universal inclusion in primary education of quality. There is considerable debate about how quality in schooling is to be defined, but this debate rarely

takes account of the how quality in education links to equality in a society. While the quality debate is sometimes settled according to various understandings of school effectiveness or school inputs, there is very little attention given to how the question of education equality is to be settled.

Our view is that there is enormous potential within the capability approach to address these problems of equality, quality, and measurement. The capability approach alerts us of the need to describe not only access to and very narrowly defined achievement in education but also to assess aspects of education deemed valuable and hence forms of distribution of resources, given complex class, gender, race and ethnic inequalities.

The capability approach, as developed in the work of Amartya Sen, provides a very useful way, given the complexity of diverse societies in the world, to think about social justice and a particular component of social justice, gender equality in education. Sen has developed the capability approach as a critical engagement with two groups of writers (Sen, 1999). Firstly, he takes issue with the approaches to evaluating social policy that focus on the aggregated benefits an initiative has for the whole society or for future generations, without regard to how it affects individuals. According to these views, for example, investing in education for women and girls is justified by its benefits not for them, but for the societies they live in. These approaches to evaluation do not look at whether any adult or child has been discriminated against in the provision of education, because the education is not for those individuals but for a larger grouping – the community, then nation, future generations. These views might be weakly interested in gender equality in education, but only in so far it is needed to ensure a range of social benefits.

The capability approach looks at a relationship between the resources people have and what they can do with them. As Sen puts it, in a good theory of wellbeing, ‘account would have to be taken not only of the primary goods the persons respectively hold, but also of the relevant personal characteristics that govern the conversion of primary goods into the person’s ability to promote her ends. (Sen 1999, 74). What matters to people is that they are able to achieve actual functionings, that is: ‘the actual living that people manage to achieve’ (Sen, 1999, 73). Walking is a functioning, so are eating, reading, mountain climbing, and chatting. The concept of functionings...reflects the various things a person may value doing or being varying from the basic (for example being adequately nourished) to the very complex (for example being able to take part in the life of the community). But when we make interpersonal comparisons of wellbeing we should find a measure which incorporates references to functionings, but also reflects the intuition that what matters is not merely achieving the functioning but being free to achieve it. So we should look at ‘the freedom to achieve actual livings that one can have a reason to value’ (Sen, 1999, 73) or, to put it another way, ‘substantive freedoms, the capabilities , to choose a life one has reason to value’ (Sen, 1999, 74). A person’s capability refers to the alternative combinations of functionings that are feasible for her to achieve. Capability is thus a kind of freedom: the substantive freedom to achieve alternative functioning combinations (Sen, 1999, 75).

The notion of capability is essential for Sen, because someone's actual functionings need not tell us very much about how well off she is. Consider Tony, a stockbroker who suddenly abandons his job to fast in support of world peace, and Sid, a stockbroker who is suddenly marooned on a barren island. After a week their physical state might be identical: looking at their level of functioning will not tell us the difference. But there is a difference: Tony, unlike Sid, is capable of a high level of functioning. His low level of functioning is the result of a voluntary choice, unlike Sid's. Here is another example. Two 15 year old girls participating in an international study of learning achievements both achieve poor results in mathematics. For one, despite attending a well equipped school with highly qualified and well motivated teachers and ample time for additional learning support, a major reason was her decision to spend less time on mathematics homework and more time with friends in a range of leisure activities. For the other, despite her interest in mathematics and school work generally, her results were largely due to long periods of absence by her teacher, who was inadequately paid, lack of a supportive culture in the school or at home for girls' achievement in mathematics, and heavy demands on her to perform housework and childcare for other family members. While the functionings of the two girls are the same, their capabilities are different. The capabilities approach captures this difference by looking behind the actual functionings to the opportunities or freedom people have to function.

2. Defending capabilities

Before suggesting some alternative ways of thinking about measuring progress to EFA drawing on the capability approach, we now want to consider some of the critiques of this approach. We are particularly interested in these criticisms in the light of some of the concerns of the EFA movement and of countries with long histories of socio-economic inequality internally and inequality with regard to economically or politically more powerful countries. We are going to focus on one particular set of criticisms made by Thomas Pogge, a defender of an apparently rival approach, based in John Rawls's work, that we shall call the primary goods approach. Since no approach can be criticized without reference to some alternative, we shall first briefly describe Rawls's approach, and then move on to discussion of the criticisms. The upshot of this discussion is that the case for primary goods is unproven, because Pogge underestimates the power of the capabilities approach, and overstates the power of the primary goods approach. We do not think that we vindicate the superiority of the capabilities approach, and in fact we believe that the best ultimate approach will be one which draws on both these approaches.

The primary goods approach says that for the purpose of justice we should compare individual's holdings of social primary goods. The list of social primary goods is arrived at by considering what conditions and resources are necessary for the development and exercise of the two moral powers of free and equal persons, viz, the capacity for a sense of justice and the capacity for a conception of the good. They are

- i) The basic liberties (freedom of thought and liberty of conscience, etc.) are the background institutions necessary for the development and exercise of the capacity to decide upon and revise, and rationally to pursue, a conception of the good. Similarly, these liberties allow for the development and exercise of the sense of right and justice under political and social conditions that are free.
- ii) Freedom of movement and free choice of occupation against a background of diverse opportunities are required for the pursuit of final ends as well as to give effect to a decision to revise and change them, if one so desires.
- iii) Powers and prerogatives of offices of responsibility are needed to give scope to various self-governing and social capacities of the self.
- iv) Income and wealth, understood broadly as they must be, are all purpose means (having an exchange value) for achieving directly or indirectly a wide range of ends, whatever they happen to be.
- v) The social basis of self respect are those aspects of basic institutions that are normally essential if citizens are to have a lively sense of their own worth as moral persons and to be able to realise their highest order interests and advance their ends with self confidence.

Although it is somewhat incidental to our purpose, it is worth noting that Rawls makes implicit claims about the relative importance of the contributions these goods make to overall wellbeing. His principles of justice are structured so that no compromises are permitted with the equal liberties principle for the sake of other goods, and no compromises with the fair equality of opportunity principle are permitted for the sake of increased income and wealth. The implicit assumptions about the relative importance of the different social primary goods to wellbeing, even for the purposes of justice, are not essential to the primary goods approach.

Pogge's strategy for criticising the capabilities approach has two parts. The first, which takes up the bulk of his paper, and with most of which we agree, is a defense of the social primary goods approach against charges made by Sen. The second, on which we focus here, is to press three objections against the capabilities approach. First, he thinks, the capabilities approach faces a serious problem in dealing appropriately with natural inequalities; second, he thinks that the approach tends to obscure the degree of unjust inequality internationally. Finally the problem faces the capability approach that, because it is so closely sensitive to personal heterogeneities, it is ill-suited to the task of providing a public criterion of justice.

First objection. One of the apparent advantages of the capabilities approach over the social primary goods approach is that it is sensitive to inequalities of natural endowments. Whereas the social primary goods are always resources, whose value, for the purposes of justice, is defined without regard to what the particular individual who has them can do with them, the capabilities approach always looks at how well the

individual can convert her bundle of resources into functionings. On the social primary goods approach two people with the same holdings, one of whom is ordinarily abled and the other is paraplegic, are equally well off. But the capabilities approach counts the paraplegic as worse off (from the point of view of justice). Intuitively this should be an advantage of the capabilities approach. But Pogge denies this. Some natural inequalities are widely regarded as what he calls horizontal, such as eye and hair and skin colour, height -- they are not intrinsically of moral concern, and no-one is owed more resources in virtue of their possession of some feature rather than another. Pogge thinks that many natural inequalities are of this kind, and that the primary goods approach is superior for treating them so:

Our awareness of the the great diversity in our valuations and of the bias in favour of one's own endowments militates against the idea of a *socially shared* ranking of persons' *overall* endowments.... (Pogge, 2003, 54)

While the resourcist approach is supported by this conception of natural inequality as horizontal, the capability approach requires that natural inequality be conceived as vertical. When a capability theorist affirms that institutional schemes ought to be biased in favor of certain persons on account of their natural endowments, she thereby advocates that these endowments should be characterized as deficient and inferior, and those persons as naturally disfavored and worse endowed... not just in this or that respect, but overall' (Pogge, 2003, 54-5)

Broadly speaking, in order to get the desired result the capabilities approach has to treat disabilities always as vertical inequalities, whereas it is desirable to treat them as horizontal inequalities, because to treat them otherwise stigmatizes the disabled person as somehow less of a person than the ordinarily-abled person. The resourcist approach, which ignores disabilities, by contrast, avoids stigma.

How can the capabilities approach respond to this objection? It is important to see that the social primary goods approach is not completely insensitive to the difficulties disabled persons often face. Some of the functionings unavailable to disabled people are unavailable not because they suffer from physical impairments, but because social institutions are set up so as to enhance the functioning of the ordinarily-abled but not the disabled person. Take the example of London Underground interchange stations, many of which lack elevators or ramps between different lines. The ability to change lines is thus rendered unavailable to wheelchair bound people. It is also, incidentally, rendered extremely difficult to all ordinarily-able persons at a certain stage of their life -- the first 3 years. Being blind, or deaf, does not make the written or spoken interactions of others inaccessible to someone: the absence of Braille and signing facilities does. The social primary goods approach can acknowledge that in so far as it is the design of social institutions that is responsible for someone's lack of a functioning there is a *prima facie* case for something to be done about it. So what justifies the Pogge response is the sense, which he has, that many disabilities are not intrinsically disabling -- they are mere

impairments that have their impact on functioning only in conjunction with the mal-design of social institutions (a la the social model of disability).

But if Pogge is right about this, or rather to the extent that he is right about it, there's no need for the capabilities approach to disagree -- it can say, sure the failure to function adequately does not have its source in the impairment but in the institutions -- so they should be rearranged. It does not make a fetish of correcting the individual rather than the institutions.

But what if there really is inequality of capabilities -- if those who are 'disabled' really cannot reach the same level of functionings as others even if there is reform of institutions? Then Pogge's objection loses a good deal of its power.

Why? First think about how the primary goods approach gets to say something about disability. It cannot straightforwardly compare the blind person and the sighted person and say that they have unequal shares of social primary goods: they do not. But in order to locate the disadvantage socially, and avoid stigmatizing the blind, it has to say, rather, that the blind person is disadvantaged by the de sign of social institutions. How is it going to establish that disadvantage? The blind person does not have an expensive taste, as, for example, we might think of someone who is sighted but prefers reading Braille over reading print, because she enjoys the tactile experience. But why not? It's hard to explain why not without appealing to the fact that she (unlike the sighted Braille reader) lacks a valuable capability absent but for the provision of Braille. It is hard to see how the primary goods approach can determine whether social institutions are set up to the disadvantage of the disabled without appealing to some notion of functioning.

Second, think more centrally about the way that girls and boys can face similar resources in schools, but these similar resources can give rise to differential opportunities because of their different needs. A school without running water is inconvenient for everyone, but much more so for girls who menstruate than boys who do not. Even absent social mores that look down on menstruation many girls may find, without adequate water provision that they cannot attend school on the days that they menstruate heavily, or be unable to learn on those days. There is nothing wrong with the girls; acknowledging that their different physicality gives rise to different needs does not imply any stigma. Girls in many schools in South Africa face a high risk of rape at school, because the security arrangements are so poor (Unterhalter 2001). The security arrangements are poor for all, but if a girl is raped and becomes pregnant this severely diminishes her access to future educational opportunities. Again, acknowledging this difference involves no stigma.

We are not making the claim that the capacities for menstruation or pregnancy comprise defects that need to be corrected for. We are saying that because of real differences in the capabilities of adolescent boys and girls similar resource allocations, especially when they fall below some threshold, can have unequal (and we think unjust) effects on their future prospects for capability sets. Nor are we claiming that the resourcist has no response to this point; our claim is just that in order to make a plausible

response we think that the resourcist has to appeal implicitly or explicitly to the likely effects of the resources on people's capabilities.

Think finally about the children who exhibit learning difficulties. If disabilities are truly horizontal, why should the state provide them with extra resources to overcome those difficulties? That is the way they are, and to provide them with extra support to overcome their difficulties is to stigmatize them. Pogge might reply that the reason to provide extra support is that educational achievement provides access to higher incomes, but this is a contingent, and eliminable, social fact -- we could decide to make incomes more or less equal. But educational achievement would still, in such a society, provide access to more interesting work, and provide opportunities for rewarding leisure activities. Even in an appropriately egalitarian society, in our view, those with education-related disabilities should be provided with extra resources and help.

The first line of defence against Pogge is complete. But a second line is also worth mentioning. Social institutions are artificial: they are created by, and susceptible to manipulation by human agency. Take a given distribution of talents, and we can see that the form of social institution adopted differentially benefits some rather than others. Social institutions, in fact, construct disability in a certain way. Consider dyslexia. Dyslexia is a much less severe disorder for someone who lives in a society which uses a phonetic language than someone who is forced to use a language like English. The world-wide adoption of English rather than, say Latin, or Spanish, as the lingua franca, is accidental, attributable ultimately to human agency, and exacerbates the disadvantage of the dyslexic. Dyslexia, although the biological condition which it manifests is still present, does not even show up as a disability in a pre-literate society. Because this choice of institutions imposes a disadvantage on the dyslexic it needs to be justified to them, just as the choice of a preliterate society (certainly if we made it now) would need to be justified to those who were disadvantaged by that. The (much) greater share of social primary goods that even the dyslexic enjoy thanks to living in a literate society goes some way to justifying the choice to them. But this does not excuse society, even on Pogge's view, from making extra educational provision, so that the dyslexic is better able to overcome her dyslexia, and thus better able both to produce and compete for the fruits of social cooperation. But even without extra educational help the dyslexic might still be better off in terms of primary goods in a literate than in a pre-literate society. Why, then, should anything more be done for her? Because she really is at an identifiable disadvantage in terms of her ability to function. She has a disability which needs to be overcome, and the capability metric highlights this.

Consider another feature of social organisation which, like literacy, may benefit all while disadvantaging some relative to others. Suppose a society gains a benefit from having a single dominant language, rather than a number of different languages of equal standing. Everyone, let us suppose, benefits from this arrangement, but within the society those who speak a particular minority language are at a disadvantage to others. There is no stigma to speaking the minority language, which is, in turn, not inferior in any interesting sense to the dominant language. But those who speak it are at a disadvantage in the pursuit of certain goods in the society. Those goods are, formally, equally available to them, but practically less readily available. What justifies compensating for that

disadvantage, for example by giving them extra language teaching in schools, or by providing or making mandatory widespread translation of official and unofficial communications? Again, we would say, the expected effects of widespread translation on the capabilities sets of the minority-language speakers.

Let's look now at the second objection. Pogge's charge is as follows. First, he criticizes the Human Development Index, which was worked out in collaboration with Amartya Sen, for having some of the same problems as standard resource measures -- the per capita GDP, Life Expectancy and Adult Literacy Indices are completely insensitive to how capabilities are distributed, being mere aggregates -- and he praises the per Capita GDP and School Enrolment Indices for reflecting resource, rather than capability-ist, thinking. The HDI is further criticized for its insensitivity to whether the inequalities in each of its indices 'mitigate or aggravate each other', whereas it seems obvious to him (and us) that when the inequalities contained within each mitigate one another across the indices a society is more just (other things being equal) than when they aggravate each other.

Pogge's charge is complex, because in part he's impugning the HDI, and indeed makes one objection which we are also making. But he points out that the capabilities approach downplays the level of global inequality. We're not sure it does. It only looks like that if you assume in advance that resources are the right measure.

Here's the problem. The poor of the world are, obviously, much less well off than the rich of the world, and any measure that failed to have this consequence merits no further consideration. But as a given society's holdings of wealth increases the opportunities for wellbeing (however that is understood, except in terms of wealth, obviously) do not increase in a linear fashion, or even in a fashion that is well-understood. Consider the longitudinal evidence within distinct economies. Between 1972 and 1991 real GDP per capita grew in the US, at a more or less steady rate, by 39%. The percentage of respondents to polls reporting themselves as 'very happy' barely increased at all during the same period; and the kinks in that curve bear no relationship to the steady rise in the growth curve. (Frank 1999, 72). In Japan GNP per capita grew steadily from 1960 to 1987 by a total of 300%; the average reported level of wellbeing in reported by respondents to surveys changed barely at all year to year, hovering around 6 (out of 10) (Frank 1999, 73). Frank summarises the evidence as follows:

One of the central findings in the large scientific literature on subjective well-being is that once income levels surpass a minimal absolute threshold, average satisfaction levels within a given country tend to be highly stable over time, even in the face of significant economic growth. (Frank, 72)

These findings chime with Fred Hirsch's argument in Social Limits to Growth that, past a certain point of material development, as the material economy grows the positional economy becomes an increasingly dominant part of the material economy. (Hirsch, 1976) The positional economy relates to certain kinds of goods that cannot be more widely distributed, because their value lies in the social construction of their high status, and part

of that status rests on the fact that access to these goods is limited. Places at elite higher education institutions are examples of positional goods, as is work in high status occupations or access to very select forms of leisure. Growth in the positional economy shows up as a growth in wealth, but it does not bring any contribution to overall wellbeing, and so should not be counted when we are comparing how well off people are from one society to another.

The problem that positionality poses for the resourcist is very similar to the problem Rawls and Pogge both address of leisure (indeed, it is arguable that the problem of leisure is just one aspect to the problem of positionality). The problem with leisure is that intuitively the person who works 12 hours a day at a wage of \$20/hr is not better off than the person who works 8 hours a day at the same wage, if the person who works less has their basic needs well met, has the opportunity to work more, and forgoes that opportunity because she has a high preference for leisure. But the straightforward income/wealth measure will show the former person up as better off. To solve this problem Rawls introduces an element to his account of primary goods which both he and Pogge admits is somewhat arbitrary -- he stipulates that the index of primary goods includes 'a certain amount of leisure time, say sixteen hours per day if the standard working day is eight hours. Those who do not work have eight extra hours of leisure and we count those extra eight hours as equivalent to the index of the least advantaged who do work a standard day' (Rawls, 2001, 179).

The stipulation is somewhat arbitrary because there is no principled reason (in Rawls theory) for preferring a standard workday of eight hours to one of 6 hours, or ten hours, and also because it specifies the workday in terms of hours of work rather than in terms of how hard one works, which has a profound effect on how much use one can make of one's leisure (for more on this see Brighthouse and Swift, in progress); that there should be some sort of stipulation, however, is not arbitrary, because it is obvious that a person with more leisure is, other things being equal, better off than the person with less (the equal other things including that for neither person is the leisure or the work forced). But why does that seem obvious? Because voluntary leisure seems, for most people, to make a vital contribution to their ability to flourish as persons, to carry out their conception of the good, whatever that may be. For most of us it is a valuable, and for some it is an essential element in our ability to have a range of human functionings.

The problem positionality, like leisure, poses for resourcist metrics is that it makes it unclear how to compare the real resource base of people in separate societies which differ with respect to the extent to which positional goods dominate their economies. This problem is compounded by the possibility that how positional goods are distributed may affect differently the opportunities for wellbeing of individuals with otherwise similar resource holdings. Consider the following example: Sid lives in a rich country where healthcare is exclusively privately provided, and which neither provides nor funds any nursing care for the elderly. Although he understands that there is a small chance he will need to spend much money on healthcare in old age, he also knows that there is a very small chance that he will have to spend a great deal of money on healthcare in old age. He is therefore driven to accumulate what, given the probabilities, is an excessive amount of capital, simply to assure himself a financially secure old age. He therefore works more than he would otherwise choose, and he, and others similarly concerned to assure a merely acceptable level of wellbeing in old age, have to pursue

economic opportunities to the detriment of a sense of community within neighbourhoods (because they move more often to pursue those opportunities), civic engagement (because they spend more time at work), family life (for the same reason). And at the end of the process, most of the people with Sid's preferences have accumulated more capital than they need: they have had to overshoot, as it were. What if Sid had lived in a society which collectively assured a more-or-less decent level of healthcare and nursing care for the elderly. With exactly the same set of preferences he and his group would have behaved quite differently, to their own benefit, and that of others (who would have been able to enjoy the benefits of living in more stable communities, spending more time with their working parents, living near their families in adulthood, not moving schools frequently, and not being in schools from and to which children were moving frequently). The inhabitants of the second kind of society enjoy many benefits unavailable to the inhabitants of the first kind of society, which cannot be readily accounted for by the resourcist metric.

We must emphasize again that we do not see the above considerations force the abandonment of the resourcist approach by any means. But, in order to deal with these kinds of phenomena, the resourcist has to appeal at a more fundamental level to some sort of capabilities. Rawls himself says this: 'the idea of primary goods is closely connected with the conception of citizens as having certain basic capabilities, among the most important being the two moral powers. What those goods are depends on the fundamental intuitive idea of citizens as persons with those powers and with a higher order interest in their development and exercise' (Rawls, 2001, 175). The problem is that the resourcist has to begin to mimic the capabilities approach in order to craft responses to the issues raised by positionality and leisure, just as (as Pogge points out) the capabilities approach has to mimic, or at least draw on, the primary good approach in order to develop workable public criteria for making interpersonal, and even intersocietal, comparisons. We do not see primary goods as having decisive advantages over capabilities, any more than vice versa.

The worries posed by consideration of positional goods may seem to be of limited practical importance in the context we are considering -- developing countries. After all, whatever the consequences of considering the complexities introduced by positional goods, the poor in the developing world are much poorer, and much worse off than, most people in the developed world. But they are important for two reasons, one general, the other particular to the task of reconsidering the criteria for EFA. The general reason is pointed to by Hirsch's comment in his seminal work on positionality:

The growth alternative offers the possibility of consensus action, of a game with winners but no absolute losers, of levelling up without levelling down: limiting the choice to distributing the increment, rather than demanding the more fundamental political act of redistributing existing resources. In one key sector B the positional sector B there is no such thing as levelling up. One's reward is set by one's position on the slope, and the slope itself prevents a levelling, from below as well as from above. (Hirsch, 1976, pp.174, 175)

And so, social limits to growth intensify the distributional struggle. They increase the importance of relative place. They intensify pressure for equalization of economic resources on the part of the worse off and stiffen resistance to equalization by the better off. (Ibid p.181)

As countries pursue development, and external agencies assist (or hinder) them in this pursuit, they need to consider what policies to take with respect to positional goods; some policies will enhance the wellbeing of some people, others will enhance the wellbeing of others, and some will enhance the wellbeing of no-one. These differences will not show up if we attend merely to resourcist measures of growth, even if we take into account distributional concerns or the refinements relating to GDP per capita introduced by the HDI.

The particular reason is this: different countries, even at similar levels of development, will distribute education (which is in part a positional good) differently, and even for different countries with the same distribution of education it will be more or less positional (and positional in different ways) depending on both the distribution of labour market rewards and the extent to which education influences labour market rewards. So concerns about positionality infect even comparisons among developing countries, especially in educational contexts (see Brighouse and Swift (in progress) for an extensive discussion of the significance of positionality for justice).

Consider, finally, a different point prompted by thinking about access to positional goods. Ann, who belongs to a group that has suffered race and class discrimination, has two daughters. Imagine that it is very difficult for children from this group to complete school, get higher education, and enter secure high paying jobs in the civil service, not because they have fewer resources spent on them, but because their previous marginalisation from those opportunities has given rise to a culture in which those are not aspired to, and alternative, less materially rewarding avenues are valorised. Ann has to battle against these cultural norms (which, we can suppose, however unrealistically, exist only within her cultural group), generating conflict with her children and husband and her own marginalisation within her own culture. She succeeds, but the real cost to her (and her children) is far greater than that experienced by a mother of similarly talented children from a group with different values. The role of social norms in non-ideal circumstances in constructing disadvantage needs to be accounted for in a metric of justice: again, the resourcist accounts are ill-equipped to do this without implicit appeal to the capabilities metric.

What about the final benefit of the primary goods approach? It is widely supposed that resourcist approaches have the advantage over other approaches that they are well suited for providing a *public criterion of justice*. (Pogge, 2003; Williams 1999, Rawls, 2001). A public criterion is one that can be displayed and scrutinised by all as equals in public discussion and debate. It is one that can not only be used, but can be seen to be being used, if you like. Welfarist measures (that depend on subjective preferences, or subjective states of individuals) are ill-suited to this task because their use depends on information that cannot be readily made public or publicly monitored. The capabilities approach, which is widely thought to be closer to the welfarist than the resourcist

approach does indeed have a serious problem with respect to publicity. Its difficulty consists in the fact that it is very hard publicly to monitor the information needed to evaluate whether people enjoy similar capability sets, and this difficulty is compounded by the difficulty of providing an index of capabilities.

However, if our conjecture is right, and the social primary goods metric, in order to overcome its difficulties, has to appeal implicitly or explicitly to conjectures about how various goods are likely to impact on capabilities, then, in so far as we are right, the difficulties of the capabilities approach will begin to infect the primary goods approach. Publicity is an advantage, and it is one that the primary goods approach usually enjoys. But it enjoys it less, the more plausible it gets.

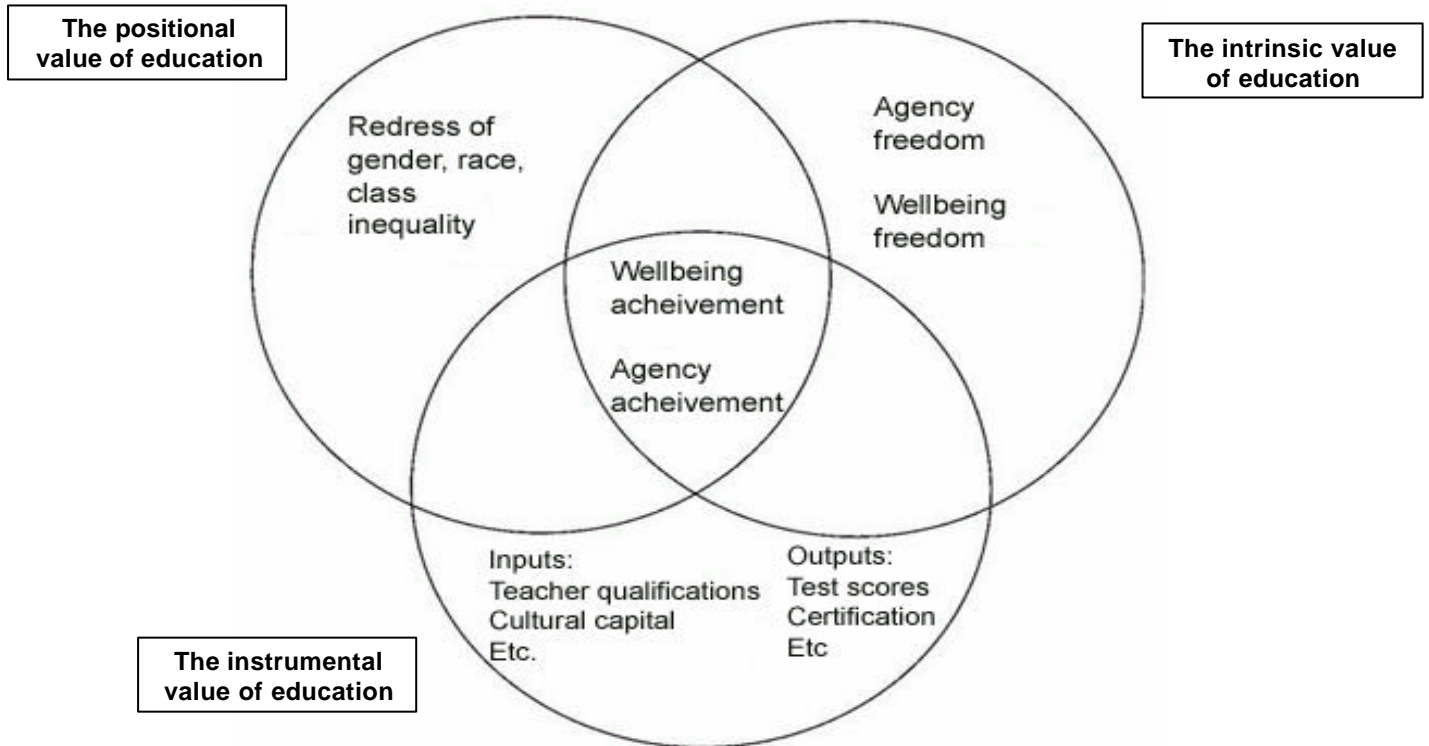
Central to Sen's formulation of the capability approach is a concern with public discussion and decision making concerning the selection of relevant capabilities. The social processes that constrain freedom in choosing for example to study mathematics or for girls to remain at school need to be subjected to rigorous public examination. A public criterion of social justice has been central to much of his recent writing, and it is to developing aspects of this in relation to thinking about EFA that we now turn.

3. Towards an alternative approach to assessing Education for All

We have outlined some of the flexibility and reach of the capability approach to evaluation in relation to some of the critiques made of it. It is this we consider that makes it a useful stepping off stone to begin to think about alternative ways to conceptualise measurements of EFA that take account of a wide conception of education and some of the debates about equality. We are suggesting some combination of the primary goods and capability approaches

The model we are developing is very preliminary, but is an attempt to depict some of the thinking linked to the capability approach in relation to education.

We have conceptualised education in relation to three different fields:



Firstly education has an instrumental value. In this field education (very often understood as schooling) helps secure work at a certain level and political and social participation in certain forms. Without some formal level of skill acquisition, schooling for a number of years or other form of initiation into a group (for example through learning a sacred language or particular religious practices) one cannot achieve vital aspects of agency and wellbeing, that is live a life one has reason to value. Of course, what one needs to learn in order to support the interest in having a life one has reason to value will be somewhat dependent on context: in particular children in societies at different levels of economic development might need quite different sets of skills to be able to be economically self-supporting. Conditions in formal settings for learning can support the development of the instrumental value of education. For example the experience of the teacher, adequate time and other resources available for instruction, support for practice of new skills from family, peers and teacher are all important. But, drawing from the capability approach, at the heart of this field lies wellbeing achievement and agency achievement because the education's instrumental value depends on it according with these, otherwise it has aspects of indoctrination or imposition. The education production function tends to measure only some components of this field, and generally ignores aspects of wellbeing and agency achievement.

The second overlapping field highlights what we call the intrinsic value of education. This refers to the benefits a person gets from education which are not merely

instrumental for some other benefit they may be able to use it to get. The educated person might have a more rewarding and complex mental life than she had before being educated, regardless of whether the education helps her gain or keep employment. She might discover the enjoyments attached to reading literature, or appreciating finding out about different forms of music; she might discover an aptitude and enthusiasm for constructing model figures, which she enjoys even though she is, after the fact, disinclined to sell them. EMIS, DHS and the education production function do not provide any indicators for thinking about the intrinsic value of education. But it is possible that we could develop proxy measures with regard to what would indicate a gain in agency and wellbeing freedom.

The third field concerns the positional value of education. Educational is positional insofar as its benefits for the educated person depend on her how successful she has been relative to others. For example, for any individual child aiming to enter a prestigious university, for which there is a fixed number of places, what matters to her is not at all how successful she has been in school, but only how successful she has been relative to her competitors. If there are 100 places, and she is 99th in line in a mediocre educational regime then she is better off (though worse educated) than if she is 101st in line in a far superior educational regime. Certification (the grades one has achieved) is the most obviously positional aspect of education, but there are many less flagrantly positional aspects: schooling the reputation and location of one's school; whom one attends school with (it is positionally better to get a mediocre education alongside fellow children of an elite, than to get a better education alongside the children of nobodies, even in relatively democratic and meritocratic societies); how well the teachers in a school have transmitted 'cultural capital' etc. Because of the positional value of some aspects of education (very often aspects of a hidden curriculum), schools might have very unequal effects, even though they might look very similar in terms of some measure of education production function. The third field, then, is an attempt to make visible the invisible forms of discrimination by gender, race or class, forms of misrecognition, and to consider some way of using the school system to effect redress and understanding of past injustice. The level of inequalities in schools could be mapped by using the methodology of the gini coefficient and scoring other dimensions of inequality (for example parental income, education or other aspects of social identity and their complex intersections). Possibly proxy measures for a school engaging with forms of redress could be developed. These measures would need to take account of wellbeing achievement and agency achievement and could not be simply handed down from some higher level of the education administration.

The significance of the ideas diagrammed is that measures trying to capture whether EFA has been achieved need to reflect these different aspects of education. In different societies, furthermore, the different aspects may be more, or less, important for supporting the interest in living a life one has reason to value. For example, we conjecture that the more unequal a society in terms of income and wealth, the more important for policy will be attending to the conditions for realising the instrumental and redress value of education, without neglecting the ways that these both are engaged with wellbeing and agency achievement.. However in a society that is more equal in terms of

income and wealth, the instrumental and redress value of education might concomitantly be somewhat less important than realising agency and wellbeing freedom together with wellbeing and agency achievement.

Wellbeing achievement and agency achievement stand in the centre of all the three overlapping fields. In developing some kind of metric we need to take account of the fact that much of the work in education, and in meeting the EFA goals relates to working with children and that thinking through the model (and its strengths and weaknesses) will entail thinking with processes of change over a cycle that takes account of children growing up and growing towards agency achievement.

Taking on board our critiques of existing measures of EFA outlined in Part 1 and our discussion of the capability approach and primary goods thus far, what are some of the areas we think need to be measured in order to effect redistribution and an expanded understanding of EFA? Below is a preliminary, idealised, list. Obviously not all of these factors are readily measurable -- the list is generated to demonstrate what we would have to know to be confident about the implementation of EFA. But other of the factors are readily measurable, and the achievement of EFA should be monitored by appeal to as many of these measures as possible.

- i) Conditions for free public discussion of the content and form of education for diverse social groups taking account of complex histories and uneven contemporary patterns of public participation
- ii) Conditions to implement, given a diversity of social settings, the recommendations of public discussions (adequate financial and skill resources to manage and evaluate the implementation, adequate time, legislation for education provision of a particular form enacted under fair conditions).
- iii) Processes through which individuals can articulate the intrinsic value of education – freedom of speech on a wide range of topics, access to resources to put skills into practice (not sure of this)
- iv) Measurements of inequality, like Gini coefficients, not just at the level of income and wealth, but also of aspects of identity that might be relevant to forms of inequality – race, ethnicity, gender and their intersections. These measures at the national and local level, including schools.
- v) The median income of teachers, and the ratio of that figure to the median income in the country being study, plus noting the extent to which teachers' salaries vary between teachers of children in higher and lower socio-economic status .
- vi) Measures of school input and output drawing on primary goods metric.

- vii) Measures of resources necessary for adequate achievement of acceptable output linked to participation in the labour market, the political system, and the forms of free public discussion in i).

Conclusion

The paper has tried to bring together areas of discussion usually held separate: critical commentaries on indicators of EFA and gender equity in education, an engagement with the justification of the capability approach, a consideration of how thinking about education as a capability can contribute to an expanded understanding of education for all. Our concluding suggestions regarding additional forms of measurement in order to think about education and redistribution is intended as preliminary and subject to discussion and revision. We consider that thinking about distribution and capabilities requires a range of different ways of evaluating social justice in the provision of education that goes beyond the existing indicators. This is a key task if we are to be confident of our achievement of Education for All by 2015

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