



MESSAGES AND CHALLENGES

SCHOOL FEES: A MAJOR BARRIER TO EDUCATION ACCESS

- **School fees are a major barrier in the expansion of schooling in poorest countries.** There is no longer a debate about this. Experience in several countries shows that the private costs of schooling to households are a major barrier that prevent many children from accessing and completing a quality basic education. The direct and indirect costs of education are especially burdensome in countries where poverty imposes tough choices on families and households about how many and which children to send to school, and for how long.
- **No child should be excluded from schooling because of the family's inability to pay.** Free and compulsory primary basic education is ABOVE ALL a human right. It is also the most important investment a country can make; it empowers children, empowers families, empowers communities, and whole countries.
- **School fee abolition is necessary but not sufficient; we must look at ALL the costs that affect the decisions of parents.** And this means any direct and indirect cost associated with the child going to school (tuition fees, costs of text books, stationary, uniforms, PTA contributions, costs related to sports and other school activities, costs related to transportation, contributions to teachers' salaries, opportunity costs, and other burdens on poor families).
- **School fee abolition may be the single most important policy measure to have a dramatic, transforming impact on school enrolment to date.** Countries that have taken the bold step to eliminate fees saw a dramatic and sudden surge in enrolment as a result: In Uganda in 1996, primary school enrolment grew from 3.4 million to 5.7 million; in Kenya in 2003, enrolment increased from 5.9 million to 7.2 million; and in Tanzania in 2003, enrolment rose from 1.5 million to 3 million.
- **School fee abolition can directly address the rights and needs of the marginalized, excluded and vulnerable children.** The tremendous surge in enrolment after abolishing fees, particularly for poor, excluded and vulnerable children (rural populations, girls, child laborers, children affected by HIV/AIDS, and children with special needs), proves that direct and indirect costs of education to families are particularly detrimental to these groups of children. School fees represent a regressive taxation on the poor. While in most cases total income from fees constitutes a small part of total education resources, enrolment of vulnerable children from poor families is very sensitive to fees, even when these are small.
- **The wide range of private costs of schooling to households must be taken into consideration in a policy of school fee abolition.** Countries should undertake a cost-benefit analysis on the policy options that yield the best result for particular contexts and conditions. These policy options range from a simple abolition of tuition fees to specific

The children who still do not enter school are largely from poor families in rural areas, and particularly girls and the disabled. For these children, the indirect and direct cost of education to families is the single most important factor excluding children from school. And the single most important policy measure to address this is to abolish school fees. There is a powerful ethical as well as development case for ensuring that no child is excluded from school because of inability to pay. Birger Fredriksen, Education Expert and Former Senior Adviser at the World Bank

measures targeting the poor, excluded and most vulnerable (subsidizations, incentives to households, cash transfers, etc.). The ultimate goal is the fulfillment of the right of ALL children to quality education.

- **School fee abolition policy options should continue to encourage and protect the engagement of parents, teachers and communities in and around the schools.**

*It is necessary to mount proper communication strategies and advocacy programmes [around school fee abolition] through community participation and community-led initiatives. **George Godia**, Kenyan Education Secretary (February 2006)*

School fee abolition policies and support to schools should not compromise the creativity and autonomy of communities and should not create welfare dependency.

BOLD MEASURES NEEDED TO ATTAIN THE EDUCATION MDGs AND EFA GOALS

- **Progress on the EFA goals and the education MDGs has been derailed.** 115 million children of primary school age (mostly girls, mostly in Africa) are out-of-school, and the number of orphans and vulnerable children is on the rise.
- **The battle is not over: Of 94 poor countries surveyed in a 2005 World Bank study, only 16 charge no fees at all.** Fee 'creep' remains a worldwide phenomenon (including in Fast Track Initiative countries), even when countries have officially and legally abolished fees.
- **Promises to out-of-school children worldwide must not be broken.** We need to move NOW, RAPIDLY AND BOLDLY.
- **Bold policy measures by countries and partners are needed to scale up progress** and put countries on more promising paths to attain the education MDGs and the EFA goals, and foremost to uphold the right of all children to free and compulsory primary education.
- **Ensuring that the most vulnerable, marginalized and excluded groups are targeted with additional and specific measures** should be at the center of bold policy measures. These include children affected by HIV/AIDS as well as child laborers.

*Today 110 million of the world's children will not go to school. The vast majority are girls. Half of Africa's children will never finish primary schooling. Delivering on education is not just about the empowerment of individuals to realize their potential, putting opportunity directly into their hands. It is also the best anti-poverty strategy, and - with trade justice - the best contribution we can make to growth and economic development. The benefits are in job chances and prosperity-for every additional year of a child's education, estimated average earnings increase by 11 per cent; and in health-for each additional year of a mother's education, childhood mortality is reduced by 8 per cent. But the demand must be for education free of charge. User fees can take as much as a quarter of a poor family's annual income in sub-Saharan Africa. Their very existence discourages parents and is one of the biggest barriers to the expansion of schooling in the poorest countries...And free education should not be at the expense of good quality education. As making education free increases demand, investment in teachers, materials, training and reduced class sizes is needed to increase supply. **Gordon Brown**, Chancellor of the Exchequer, United Kingdom, "The Independent" (January 4, 2006)*

SCHOOL FEE ABOLITION IS NOT A MAGIC WAND

- **School fee abolition does not stop at policy declarations and needs to be translated into a set of sound, well-planned, widely negotiated, comprehensive and sustainable policy and operational frameworks.** The abolition of school fees is feasible and realistic; but the debate on school fee abolition should focus on the ways to plan, manage and sustain the complex processes that follow policy declarations and the dramatic surge in enrolment.
- **Experiences show that, while school fee abolition leads to a dramatic enrolment surge, the process has not played out without major challenges, which need to be taken into**

consideration and addressed if the gains made are to be consolidated and sustained.

These challenges touch on quality issues, on specific measures to ensure equity, on governance and management issues, and on issues of financing and allocation of resources.

Quality: School fee abolition needs to be accompanied by advance planning to deal with the enormous challenges of surge: the supply of the necessary and adequate classrooms and school facilities, the timely procurement and distribution of textbooks and school material, and the additional supply and remuneration of (well-trained) teachers, especially in countries where the ranks of educators are being depleted by HIV/AIDS.

Equity: In many countries excluded, marginalized and vulnerable groups may still not go to school despite fee abolition and need to be targeted with additional specific measures that deal with, for example, gender discrimination (in relation to girls), extreme poverty (in relation to the opportunity costs of child labor) and stigma and trauma (in relation to children affected by HIV/AIDS).

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 future, 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. Gene Sperling, Director, Center for Universal Education/Council on Foreign Relations, Global Partners Forum on Children Affected by HIV/AIDS (February 2006)

Governance and management: School fee abolition requires the strengthening of decentralized structures to ensure a proper flow of resources, supplies and budgetary allocations to the schools, as well as the capacity building of schools in planning, budgeting, procurement and management. Abolishing school fees also needs to factor efficient accountability and monitoring systems to warrant compliance with procedures and transparent procurement and use of funds.

Financing and allocation of resources: School fee abolition has important implications on the available funds for poverty reduction priority sectors and on the public sector wage bill. It forces countries to examine how they can better mobilize domestic financial resources. Education ministries will have to defend their budget share through strong sector plans based on more efficient spending. A school fee abolition policy must be embedded in national poverty reduction and social development plans and linked to overall macro-economic perspectives.

- **Countries must also address the balanced development of the overall education and training system and develop strategies for addressing the cost barrier to access at the secondary level.** As full enrolment is reached, with most children completing the primary cycle, the immediate challenge will be equitable access to secondary schools. In order to address this issue, many countries are shifting more of the costs for technical, vocational and higher education to the main economic beneficiaries.
- **School fee abolition can bring about improvements in the overall management of education systems and even trigger sector-wide education and social development reforms.** It is not just simply an isolated policy measure and it is no longer just about managing the enrolment surge and the challenges it poses. Because school fee abolition needs to be implemented within a sound policy framework in education – and in other sectors which are linked to education – it forces countries and development partners to scrutinize education and social development plans (as well as external aid), to identify inefficiencies, and to explore avenues for more efficient and equitable management of resources. School fee abolition has the potential of informing more sustainable reforms within and beyond education.
- **The abolition of school fees involves intensive policy negotiations and political trade-offs.** Finance Ministers, but also donors (through the FTI and other financing mechanisms), the World Bank and the IMF, need to come on board for the consideration of financing options, for sustaining school fee abolition within national budgetary provisions and within

predictable long term aid modalities, and for ensuring the transparent and efficient use of funds and equitable and synchronized investments across all social sectors. Teachers' unions need to be involved from the start, in particular regarding the balance between salaries and other expenditures, but also for mobilizing their engagement. The role of civil society needs to be acknowledged as key in developing and sustaining the capacities of communities and in generating resources.

*We all have our different roles to play in making real change happen and enabling children to fulfil their right to education, to open the opportunities and choices that education can bring. We hope this Initiative will create a momentum that will lead other countries to abolish school fees. **Janice Dolan**, Save the Children, Nairobi SFAI Workshop (April 2006)*

THE NEED FOR AN INITIATIVE: FACILITATING COMPACTS AND CREATING AN ENVIRONMENT FOR SUCCESS

- **A school fee abolition policy at country levels requires solid technical and financial COMPACTS to ensure that the available resources are mobilized and channeled effectively towards the achievement of concrete results.** The School Fee Abolition Initiative (SFAI) was launched with the aim of demonstrating what kind of support is possible and of facilitating such compacts.
- **The goal of SFAI is to organize and provide guidance to countries in planning and implementing a policy on school fee abolition, in securing rapid intensified external assistance in the short and medium term, and in ensuring long term sustainability in terms of more equitable allocation and effective management of education and other resources.** SFAI will be engaged with countries that decide to plan and implement effective policies of school fee abolition and that seek support in this regard.
- **SFAI is foremost based on the rights approach to education.** Central to the Initiative is that excluded, marginalized and vulnerable groups are targeted within efforts towards more inclusive and non-discriminatory education systems.
- **The Initiative will be taken forward at the country level through studied, evidence-based strategies.** The Operational Guidance Paper (OGP) is one of the main outputs from the Initiative and is based on experiential knowledge and analysis of successes and pitfalls. It will help countries in taking the various steps required to prepare good plans.
- **SFAI is NOT intended as a separate initiative to raise and channel funds.** The aim is that it becomes folded within existing EFA frameworks and financing mechanisms, specifically the EFA FTI and that it contributes to strengthening these frameworks.
- **Strengthening partnerships and building compacts is at the basis of SFAI work.** SFAI is rallying the support of various constituencies and partners at national, regional and global levels and is working on developing strategies for more meaningful cooperation and more impact. SFAI will facilitate several platforms for different constituencies to engage: the constitution of a HIV/AIDS Working Group to work more intensively on children affected by HIV/AIDS; the formation of a Civil Society Working Group to articulate and organize the role of civil society; etc.

*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. **Gene Sperling**, Director, Center for Universal Education/Council on Foreign Relations, Global Partners Forum on Children Affected by HIV/AIDS (February 2006)*