

# INVESTMENTS

IN MIDDLE EAST, EASTERN AND SOUTHERN  
AFRICA REGION: GAPS & OPPORTUNITIES  
TOWARDS SUSTAINABLE FINANCING  
BEYOND GPE COMMITMENTS

## EXECUTIVE SUMMARY

### 1.0

## INTRODUCTION

Plan International strives to advance children's rights and equality for girls all over the world. It works alongside children, young people and partners to tackle the root causes of challenges facing girls and all vulnerable children. In the Middle East, East and Southern Africa (MEESA) region, Plan International operates in 15 countries, working with communities and partners across multiple sectors including Education, Child Protection, and SRHR and in responding to disasters and humanitarian crises across the region. Plan International commissioned this study to assess the extent to which Education Sector budgets are adequate, gender-responsive and inclusive and to analyse education budget trends between 2019 and 2021. This aimed to generate concrete evidence regarding trends in education sector budget allocations and expenditure to support advocacy for adequate expenditure on quality, inclusive and gender-responsive public education service provision and achievement of SDG 4.

## METHODOLOGY

The research employed a multi-pronged approach that included: i) Budget tracking and analysis, ii) Policy analysis, and iii) Political Economy Analysis. Budget tracking and analysis explored trends in allocations and expenditure to the education sector across over three years (2018 – 2020) years using official budget data from National Treasuries, with a particular focus on allocations and provisions for gender-responsive, disability-inclusive and climate change education. Policy analysis involved interrogation of existing policy documents touching on the education sector and the extent to which the policies factor in gender, disability inclusion and climate change education. Political Economy Analysis interrogated implications of interests, institutions and politics on resource allocation trends and determination of the education budget.

- **Who we Consulted – Data Sources and Methods of collection:** The study focused in 10 countries in the MEESA region - Kenya, Uganda, Zambia, Malawi, Zimbabwe, South Sudan, Tanzania, Egypt, Somalia and Rwanda. It consulted a mix of existing and new data sources. Purposive and convenience sampling techniques were utilised to identify respondents and literature/data consulted. This involved selecting respondents based on their mandates, expertise and involvement in the education sector. Using this criterion, the study consulted 19 respondents and 259 pieces of literature (policies, budget documents, strategic plans, sector reviews, and reports) across the 10 countries. The study adopted a mixed-method approach to collecting data that included; i) Desk review which entailed a consultation of existing education policy and budget documents and ii) Electronic Key Informant Interviews conducted virtually via Zoom and entailed one2one conversations with selected respondents.
- **Analysis and presentation of Study findings:** For quantitative data, the study utilised Ms. Excel to explore and highlight trends and patterns emerging from education spending in the 10 countries over the three years it focused on. For uniformity and cross-country comparison, figures in local currencies were converted to USD using current conversion rates prior to the analysis. Findings of the analysis are presented in charts and graphs accompanied by a descriptive analysis that further described the trends and patterns drawn from the analyses. The analysis of qualitative data employed manual content analysis where audios recorded from the interviews were used to develop text transcripts. The transcripts were analysed through thematic/content analysis guided by study objectives/questions and presented in the form of descriptive texts and verbatim quotations.
- **Limitation of the Study:** Among the key challenges encountered in conducting the study included: i) Challenges in accessing official public information like budget books, policy documents, sector reports and reviews among others, and ii) Limitations in access to respondents, particularly government officials. The study nonetheless, gathered sufficient evidence upon which the analyses and conclusions presented in the report are anchored.



## ECONOMIC OUTLOOK OF MEESA REGION

Countries in the Middle East and Sub-Saharan African (MEESA) region experienced favourable economic conditions over the period under analysis (2018 – 2021) recording an average growth rate of 4.7% in 2019. The onset of the pandemic, which led to global lockdowns, drastically affected the economies, with an average contraction of 1.1% in 2020 as each of the countries introduced different containment measures to curb the spread of the virus. With the ease and relaxation of these containment measures, the different economies are expected to rebound with average projected growth rates of 4.5% in 2022. Public debt emerged as an important issue impacting public finance management generally and government investments in the education sector across all countries in the region. The IMF notes that public debt in sub-Saharan Africa has continued to rise over the past two decades, despite the region experiencing favourable economic growth. As of 2020, public debt in the region increased to about 58% of GDP – the highest level in nearly 20 years. Increasing public debt stocks and debt repayment obligations are argued by practitioners to risk crowding out development expenditure (in crucial social services like education) as revenues raised are dedicated to debt repayment. Debt servicing costs are usually catered for in country annual budgets and as such, increasing debt servicing costs translate to reduced amounts of sharable revenue available for the provision of essential services such as education.



**(2018 – 2021)**

(MEESA) REGION EXPERIENCED  
FAVOURABLE ECONOMIC  
CONDITIONS RECORDING AN  
AVERAGE GROWTH RATE OF  
4.7% IN 2019.

## EDUCATION IN THE MEESA REGION (OUTCOMES AND POLICY FRAMEWORKS)

This research established that substantive progress has been made by States across the region towards attaining education outcomes. This is evident in significant improvements in general access (demonstrated by high enrolment rates and notable progress in ensuring gender parity). Nonetheless, there remain gaps in assuring quality education, transition rates, equity, disability inclusion, child protection, nutrition, reduction of GBV and addressing Sexual Reproductive Health needs. Most of these challenges are attributed to resource challenges that limit available infrastructure, facilities, equipment, learning and teaching materials (like books), and human resources (teachers).

Across the region, there are robust policy frameworks at national levels that buttress planning, coordination, resource allocation and management of the sector. However, there are notable gaps in some countries in the MEESA region regarding capacity to make policy, implement and review outcomes, and access to information regarding policy implementation. This is for instance in areas of special needs, STEM, climate change education and overall sector. There is thus need for more rigorous policy reviews and regular updates of sector plans and strategies to keep up with the dynamic needs of the sector.



### KENYA

IS THE ONLY COUNTRY IN THE REGION  
WHOSE ALLOCATIONS TO THE EDUCATION  
SECTOR HAVE CONSISTENTLY EXCEEDED  
THE GPE BENCHMARKS WITH 26.7% OF  
BUDGET IN 2020

## TRENDS IN INVESTMENTS TO THE EDUCATIONS SECTOR IN THE MEESA REGION

Regarding financing for education in the MEESA region, the general outlook is that although education sector receives the largest proportions of budgets across most States, allocations to the sector are yet to meet GPE summit targets of at least 20% of the total budget and 6% of GDP. Kenya is the only country in the region whose allocations to the education sector have consistently exceeded the GPE benchmarks with 26.7% of budget in 2020. Notably, no country in the region has met the 6% of GDP target signalling that there remain significant gaps in education financing in the region.

States vary in terms of prioritisation of the sector. Whilst some countries (like Kenya, Uganda and Rwanda) demonstrate political will in terms of policy attention and resource allocation, others (like Zimbabwe, Malawi, South Sudan and Somalia) appear constrained by macro-economic challenges and state fragility that manifest in competing resource demands that limit available resources for education. Tanzania, South Sudan and Malawi had the lowest proportions of education sector budget as a share of GDP at 1%, 1.9%, 0.9% in the FY2020/21 respectively. However, significant progress has been made in South Sudan where there has been a steady increase in education budget as a share of the country's estimated GDP - from 0.4% and 1.3% in FY2018/19 and FY2019/20 to 1.9% in FY2020/21. This is a substantive improvement considering South Sudan is still grappling with the aftermath of decades of conflict and underdevelopment.

There is significant imbalance in terms of allocations to emoluments for human resources (teachers) compared to investments in other sector necessities like infrastructure, facilities, equipment and books. This may be impacting quality, access and equity. Notably, Early Childhood Development Education remains under prioritized – more focus across the region is on primary education.

Whilst ODA contributes substantively to financing education in the region, for most countries, it forms a small proportion of the basket of financing. ODA largely supports basic education and post-secondary education programmes. However, there are situations, especially those encumbered by state fragility and resource constraints like Somalia, South Sudan, Zimbabwe and Malawi, where the share of ODA in total education spending is significant. The World Bank, USA and Germany are the top three largest financiers for education in the MEESA region. The education sector in the region is however, not highly prioritised by development partners with a large proportion of ODA being channelled to other sectors such as infrastructure and services, production sectors, health and humanitarian programmes. Dependence on ODA across many of the jurisdictions in the region not only raises questions of sustainability but also of independence of education systems. This happens against the backdrop of gaps in Domestic Resource Mobilisation, even for natural resource-rich countries like Zambia and Zimbabwe. There is room for various actors to work towards addressing corruption, tax base erosion and the growing public debt problem in the region that limit fiscal options that governments work with.



### TANZANIA, SOUTH SUDAN AND MALAWI

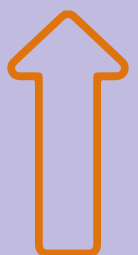
HAD THE LOWEST PROPORTIONS OF  
EDUCATION SECTOR BUDGET AS A  
SHARE OF GDP AT 1%, 1.9%, 0.9%  
IN THE FY2020/21 RESPECTIVELY



### SOUTH SUDAN

THERE HAS BEEN A STEADY  
INCREASE IN EDUCATION BUDGET  
AS A SHARE OF THE COUNTRY'S  
ESTIMATED GDP -  
FROM

**0.4%**  
**AND 1.3%**  
IN FY2018/19 AND  
FY2019/20 TO  
**1.9%**  
IN FY2020/21.





## 6.0

### **GENDER RESPONSIVENESS OF EDUCATION SECTOR BUDGETS IN THE MEESA REGION**

There is notable progress in terms of gender inclusion in the education sector in most of the jurisdictions in the region. This is enabled especially by direct programmes and policies targeting reduction of costs, elimination of barriers and addressing inherent inequalities that limit opportunities for girls. However, more policy coherence, increased investment and advocacy targeting barriers to education for girls are still necessary. This includes not only services and commodities but also curriculum adjustments that respond accordingly. There remain challenges in terms of child protection, reduction of GBV and addressing Sexual Reproductive Health needs more holistically. Incidences of GBV and SRHR related challenges faced by girls remain high across the region.

## 7.0

### **RESPONSIVENESS OF EDUCATION SECTOR BUDGETS TO DISABILITY INCLUSION IN THE MEESA REGION**

The general outlook is that many states in the region have made effort towards increasing disability inclusion in education – through the enactment of policies that recognise rights and endeavour to provide opportunity for learners with disability. Despite the progress made, many countries in the region are yet to establish sufficient mechanisms for collecting and aggregating accurate information on learners with special needs, develop specific guidelines on budgeting and ensure inclusion of voices and views of people with disability during the budgeting process and other resource allocation conversations. There is still more that needs to be done in terms of policy implementation and development of monitoring and evaluation frameworks to facilitate better gathering of information on learners with disability, their identification and inclusion into the system and costing of special needs education.



## INVESTMENTS IN CLIMATE CHANGE EDUCATION WITHIN THE MEESA REGION

Within the region, governments have instituted various policy instruments and plans that seek to mainstream climate change education, including embedding its components into curriculums and education systems. Moreover, education sector strategic plans and other associated policy frameworks and guidelines appreciate the need for leveraging the delivery of climate change education to address the imminent threat of climate change. It is however notable that in most countries, there exist no defined framework for financing and no standalone subjects on climate change education. The net effect is that across the MEESA region, States invest minimal resources to integration of climate change into the education system. There is need for lobbying and policy dialogue to get climate change more attention in planning and budgeting in the education sector.

## RECOMMENDATIONS

It emerges that whilst the education sector appears to receive significant shares of budget across the board, prioritisation is uneven and falls below global commitments – GPE and SDGs. Financing education is hampered by significant macro-economic challenges remitted by debt repayments, Illicit Financial Flows from the region, corruption and State fragility that limit availability and efficiency in management of resources allocated to the sector. Moving forward, hereunder are some recommendations/avenues for change that education sector stakeholders across the MEESA region, especially CSOs like Plan International and other partners, can pursue to promote reduction of gender inequities, disability inclusion and integration of climate change education.

1. Target political actors with advocacy messages to increase prioritisation of education at national and regional (AU and RECs) levels. This should include targeting a balance between investments in social sectors (like education) and infrastructure.
2. Advocate for more budget transparency – to increase access to information on plans, resource allocation and expenditures of resources to the sector. This should include advocacy for better disaggregation of data;
3. Contribute to advocacy for increased Domestic Resource Mobilisation (DRM) across the region – to increase resources available to education sector including advocacy for reduction of Illicit Financial Flows (IFFs) out of the region that limit government revenues;
4. Advocate for accountability in the sector to ensure available resources are efficiently managed and utilised.

5. Encourage States at national level to conduct more rigorous reviews of sector policies and regular updates of plans to generate current information for the sector to keep up with emerging issues and trends;
6. Encourage relevant education sector Ministries, Departments and Agencies (MDAs) at national levels to strengthen management information systems to facilitate regular gathering of data on sector outcomes to inform policy and resource allocation;
7. Broker multi-stakeholder dialogue (between education sector stakeholders and national Treasuries) towards better costing of education needs especially considering introduction of new curriculums and emerging needs like ICTs, Climate Change Education and Special Needs Education;
8. Advocate for more open public policy-making processes in the sector at national levels to promote inclusiveness and increase citizen participation – in planning, budgeting and expenditure review;
9. Conduct more in-depth country-level public expenditure reviews for the sector to increase information available for advocacy;
10. Advocate for the formulation of specifically tailored sector policies or guidelines that address gender inequities, disability inclusion and integration of climate change into the education system;
11. Advocate for more capacity development targeting both institutional and human resources on management and coordination especially for states with devolved or decentralised education systems to minimise inefficiencies in application of sector resources;
12. Advocate for improved teacher welfare that addresses teachers' pay, teacher training institutions, recruitment and benefits to increase morale and job satisfaction.
13. In terms of sub-sector resource allocation, advocate for more resources for ECDE and post-primary education to cater to increased demand and to improve transition.
14. Encourage States to increase balance between recurrent expenditures and development to cater to increased demand for facilities, infrastructure and equipment;
15. International instruments, standards and commitments matter - advocate for States to honour commitments towards SDG 4 and implementation.



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