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特集

コロナ禍における比較国際教育研究の新展開

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特集「コロナ禍における比較国際教育研究の新展開」にあたって

澤村信英

(大阪大学)

1. はじめに

新型コロナウイルス感染症 (COVID-19) 拡大により、2020 年 3 月以降、海外渡航が著しく制限され、それが現在まで 2 年近くも続いている。多くのフィールド研究者にとっては、新しいデータの収集ができなくなった。これは比較国際教育に関わる多くの研究者にとっても、死活問題である。研究者個人が独立的に行う質的な研究は、とくに展望が開けず、新たな研究成果を発表するにも限界がある。

本特集においては、この逆境を研究の方法を広げるチャンスとして捉え、これまで個別に蓄積してきた研究結果と知見、経験を統合し、新たな比較国際教育学の知の創造に挑戦する。そのため、協働と共創を基本とし、多くの発展途上国にとって共通の課題である教育の普遍化と格差をめぐるさまざまなテーマを設定し、研究チームを組織した。研究の方法は、複数名による国際比較研究、あるいは対象が一か国の場合は現地研究者 (日本への留学生を含む) との共同・協働研究で特徴づけられる。このような研究に取り組むことができる背景には、海外渡航ができないことがあるが、コロナ禍の終息後にも学術的な価値を持ち、共著であるからこそ生成できる独創的な成果を目指した。

2. 特集企画に至るまでの経緯

2020 年 3 月の頃を思い返せば、半年ぐらいで感染拡大は収まるかもしれないという期待があった。個人的には、重症急性呼吸器症候群 (SARS) の場合は、半年後に終息したとの話があり、それでもずいぶん長くかかったのだという感覚を持ったことを覚えている。それほどグローバルな感染症蔓延に対する危機感が足りなかった。東京オリンピックの延期が決定されたのは、2020 年 3 月下旬のことである。感染終息まで数年かかるという報道もあったが、2020 年は近いうちに海外渡航が自由になると期待していた時期である。しかし、そのような甘い考えは年末に吹き飛び、2021 年は根拠のない期待を抱いてはいけないことによりやく気づいた。

この特集企画を考える契機となったのは、忘れもしない 2021 年 4 月 28 日に開催したオンラインでの科研費 [基盤研究 (A) 2019~2022 年度「アフリカ・アジア諸国における教育の普遍化と格差に関する国際比較研究」(19H00620)] の打合せ会議であった。2020 年度は現地調査ができず、従ってあらたなフィールドデータはまったく得られていなかった。それにもかかわらず、これまでの研究の蓄積から、新しい研究成果の発表が研究分担者からあり、それにただならぬ知的刺激を受けた。そして、科研の年度計画にある 2 年目の相互のフィールドの訪問と共同研究の実施にあたり、実際に合同で調査を行わなくとも、共著論文が書けるだけの研究蓄積がそれぞれにあることを再認識した。逆に言えば、通常であれば、フィールド調査で忙しく、横のつながりで共著論文の執筆まで進めることは難しいが、外出もできない状況になり、そのような環境が整ったという言い方もできるかもしれない。9 月 29 日にオンラインで開催した特集論文中間発表会でも着実な進捗が確認できたのは、本当にうれしいことであった。

共同研究に多少のこだわりがある理由は、主に 2 つある。まず、個人的な経験として、ケニアでのフィールド調査を内海成治先生 (大阪大学名誉教授) や学生と 20 年近くにわたって行い、そこでの学びが非常に大きかったことがある。通常、なかなか旅程が合わないものであるが、2010 年頃までは、今とは比べ物にならないぐらい研究に使える時間が多かったように思う。

もう一つは、日本の学術誌に掲載される比較国際教育関係の論文は、圧倒的に単著が多いという違和感である。これは日本の学会誌などにおいて、共著者は全員が学会員であることを規定する投稿規程の影響もあるかもしれないが、一人で考えているだけでは、研究の方法や分析の仕方にも限界がある。複眼的に思考す

るためには、先に述べた経験にあるように、複数で同じあるいは類似したテーマに取り組むのが効果的・効率的だと考えるからである。

このような経緯から、筆者のやや強い思い込みの部分もあり、ご寄稿いただいた方々にはご負担をおかけした面もあると思う。一方で、本特集論文の最後に掲載した座談会の記録を読むと、こういう海外渡航が制限される中、研究者として楽しんでいただいた面もあるとわかり、企画者として安堵しているところである。

3. 特集論文の構成と内容

本特集論文は英文 7 編から構成されているが、大きく分けて 3 つに分類できる。まず複数の著者による国際比較研究であり（最初の 4 編）、次に異なる国で類似の研究関心をもつ者によるレビュー論文（中ほどの 1 編）、最後に日本で学ぶ留学生を筆頭として母国を対象とした共著論文である（最後の 2 編）。

第 1 に、坂上・小川・澤村論文であるが、アフリカの多くの国では、パンデミック以前から教育分野において様々な課題に直面している中、本論文は、ケニア、ウガンダ、マラウイの COVID-19 パンデミックへの政策対応について、高頻度電話調査データを用いて議論している。これらの国における遠隔学習のアプローチは、主にラジオ、テレビ、携帯電話などの利用を前提としており、これまでに存在していた国家間および同一国内の不平等をさらに拡大させている可能性があるという。このような国の大多数の子どもたちは、紙媒体の教科書をはじめとする学習材の入手さえできないほど困窮しているため、ICT に過度に頼ることがない現実的な方法を模索することで、生徒の学習意欲を維持、高めることの必要性を示している。

第 2 に、牧・小川・坂上論文は、アフリカで中進国入りを目指すケニアとウガンダ、そして経済発展を遂げたタイの比較研究に挑んでいる。国の背景や教育・経済データ、政策文書などを比較しながら、教育の普遍化と格差、各国の教育政策の全体像とビジョン、格差是正の取り組みなどを検討している。初等教育の普遍化が進んでいるにもかかわらず、中等教育以降では農村部と都市部の格差が広がっているという。そして、教育の発展と平等化に関して、各国はその国の優先分野や産業に応じて、また不平等に対する各国の認識により、異なる目標分野と戦略を持っていることを明らかにしている。

第 3 に、大場・利根川・川口論文では、インクルーシブ教育はアフリカ諸国の政策の中では、マラウイとエチオピアでのインクルーシブ教育の実践について論じている。両国は口承の伝統があり、インクルーシブ教育は比較的新しく導入された考え方であり、視覚障害のある子どもは他の障害のある子どもより、必要な支援が受けられやすいという。アフリカ諸国では、インクルーシブ教育に対する準備ができていないにもかかわらず、その導入を外部から迫られている。特に人的・財政的リソースが限られているため、障害のある生徒が、さらに厳しい状況に追いやられる可能性を強調している。また、現行の教育システムは、高い学力を身につけることを生徒に求めており、それが難しい環境にある生徒の排除へもつながることを指摘している。

第 4 に、坂口・小川・ロスルナイボ・園山論文は、南アフリカ、ケニア、マダガスカルの中等教育の国家カリキュラムと修了試験を検討することによって、「格差」概念（例えば、（不）平等、（不）公正など）の意味と使用方法を明確にしつつ、固有の文脈が極めて重要であることを指摘している。南アフリカでは、このような「格差」概念はグローバル社会に向けて使われており、ケニアではアフリカ的な社会主義を示唆しているという。一方、マダガスカルでは人生哲学のように、人々の行動に影響を与える社会的規範と密接に結びついている。本研究で明らかにできたのは、これらの国々における「格差」概念の表れ方の一端に過ぎず、さらなる研究の必要性が強調されている。

第 5 に、大場・小原・興津論文であるが、過去 20 年間の低学費私立学校（LFPS）に関する研究をレビューすることで、現在の LFPS に関する議論の特徴と問題点を明らかにしている。多くの研究では、LFPS の運営のために可能となる解決策を検討するのではなく、西洋のイデオロギー的な観点から LFPS について論じる傾向にあるという。LFPS は、政府が提供できない貧困層にある人々の教育的ニーズを満たすものであり、経済的に困難な状況にある多くの家庭に重要な役割を果たしているが、現場レベルの声が見落とされているという主張である。そして、公立学校にも LFPS にもアクセスできない子どもは、研究の対象にもなっていない。

第 6 に、ウタミ・清水・日下部論文では、インドネシア全地域で宗教教育（REFAL）を提供する際のコミュニティが補完する社会的な機能に焦点を当て、豊かな文化と宗教的歴史を持つジョグジャカルタとバンカという 2 つの地域において事例研究を行っている。まず政策面から検討を加え、次に対象の 2 地域で、REFAL

の提供における学校とコミュニティ間の相互作用を調査することで、様々な格差を把握しようとするものである。政府は、すべての宗教に平等な立場を与えようとしているが、現実には都市部の一部で行われているに過ぎないという。農村部では、特に少数派の宗教に対する宗教教育の評価において、コミュニティがそのギャップを埋めるために介入する必要性を論じている。

そして最後に、アンドリアリニア・ラツンプマララ・澤村論文は、アンタナナリボ大学を構成する高等師範学校を事例として、COVID-19 感染拡大下、緊急的に導入された遠隔教育の実施が、いかなる変化をもたらしたか、特に格差に焦点を当て、検討している。研究方法として、マダガスカル在住の大学教員と協力し、参与観察、オンラインによる質問紙調査、インタビューを行っている。従来の対面式の教育方法をオンライン学習に変更させる際、学生側から見た教員側の負担や問題点を報告している。また、学生の生活環境を検討し、不平等に適切に対処するためには、「教える」「学ぶ」ことだけでなく、「生きる」「働く」ことが重要な観点であることを考察している。

このような英文論文に続いて掲載されているのは、アフリカ教育学会第 28 回大会（2021 年 10 月）において開催した主要な著者による座談会形式の特別セッションの記録である。大会実行委員長の坂口真康先生が、本セッションの司会進行、および原稿の取りまとめと編集を担当した。その題目にあるように、共同・協働研究を通してアフリカ教育研究の展開を直接体験する中、コロナ禍の「逆境」を乗り越えるための挑戦の様子が、率直な意見交換として、論文には表れないタッチで描かれている。

4. おわりに

筆者は、2020 年 3 月 1 日から 10 日まで、ケニアの首都ナイロビで調査をしていた。国際放送では、COVID-19 のアジアや欧米での感染拡大が日々報道されていたが、ケニアでは一人の感染者も確認されておらず、それほど切迫した感じはなかった。しかし、筆者の帰国後、3 月 13 日に一人目の感染者が空港検疫で見つかり、そのわずか 2 日後、15 日には全国の学校が閉鎖され、その政府の対応は驚くべき早さであった。

帰国後の日本の雰囲気を取り返れば、安倍晋三首相（当時）により 3 月 2 日から小中高等学校に臨時休校の要請は行われたが、3 月半ばまではそれほど緊張感が社会になかったように思う。それが 4 月になり、大阪大学においても授業はすべてオンライン、学生・教員共に、登校禁止の措置が取られた。その後これまで、感染拡大と縮小が繰り返されたものの収束する気配はほとんどない。外務省の感染症危険情報は多くの国でレベル 3（渡航中止勧告）のままである。2022 年には、海外渡航が多少は自由になることを願いたい。

特集論文として掲載した一連の研究は、海外での新たな調査が困難な中、個々の研究者が蓄積してきた知見とデータによるところが大きい。研究チームとして、先に述べた JSPS 科研費の研究分担者・協力者が集まったことが契機となっている。ここでは、その中間的な研究成果の一部を取りまとめている。

最後に、英文論文の校閲、編集には、大阪大学大学院人間科学研究科博士後期課程に在籍する留学生のリナさん（ANDRIARINIAINA Fanantenana Rianasoa）とルズさん（RASOLONAIVO Andriamanasina Rojoniaina）に大変お世話になった。この 2 人の協力がなければ、このように特集論文を円滑に編集、刊行できなかったことは間違いない。ここに記して謝意を表したい。

Inequality in Learning Engagements Amid the COVID-19 Pandemic: A Comparative Study of Kenya, Uganda, and Malawi

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Abstract

School closures have been introduced as part of social distancing measures in response to the COVID-19 pandemic worldwide. To mitigate the negative impact of the learning loss caused by school closures, countries have made significant efforts to ensure equitable access to quality learning, mainly by providing distance learning opportunities. However, there is a scarcity of empirical studies which explore the reality of how children have engaged in learning during the pandemic, especially in developing countries. The overall purpose of this study is to compare the policy actions and inequality in access to learning opportunities among primary and secondary school-aged children in three developing countries in Eastern Africa, namely Kenya, Uganda, and Malawi. This study used high-frequency phone survey data. The study found that only a small proportion of children engaged in learning activities used distance learning tools, including low-tech and one-way ones such as radios. It was also found that inequality in learning engagement exists among children who are out of distance learning platforms; it is potentially more severe in less developed counties.

Keywords: educational inequality, school closures, COVID-19, sub-Saharan Africa

1. Introduction

While it took some time for the coronavirus disease 2019 (COVID-19), first discovered in the city of Wuhan, China in December 2019, to reach Africa, it rapidly spread to all nations on the continent once the first COVID-19 case was confirmed in Egypt on 14 February 2020 (World Health Organization [WHO] Regional Office for Africa, 2020).¹⁾ The WHO declared the outbreak as a global pandemic on 11 March 2020. Although there remains an ongoing concern about the impact of the pandemic on the region considering the fragile health system, the available data show a substantially lower number of COVID-19 cases in Africa than in other regions. Africa comprises 14% of the world population; however, as of December 2021, the region accounts for only 2.7% and 3.0% of the total number of cumulative confirmed cases and cumulative deaths in the world, respectively.²⁾ Studies suggest that this trend could be explained by Africa's early mitigatory responses as well as unique demographic structure with a younger population rather than the limited testing capacity (Adams et al., 2021; Chitungo et al., 2020).

School closures have been introduced as part of the common social distancing measures within these mitigation strategies worldwide (United Nations Educational, Scientific and Cultural Organization [UNESCO], 2021a). To mitigate the negative impact of the learning loss caused by school closures, countries have made significant efforts to provide distance learning opportunities to ensure equitable access to quality learning, giving priority to the basic education sub-sector (UNESCO, 2021b). Moreover, there is a growing concern about the widening educational inequalities caused by the digital divide in access to distance learning for children, especially in developing countries (Avanesian, Mizunoya & Amaro, 2021; Azubuike, Adegboye & Quadri, 2021; Hossain, 2021). In preparing more equitable education policy packages for a future pandemic, it is critically important to explore the reality of how children engage in learning during the pandemic as well as the existing gaps between different socio-economic status (SES) groups. However, little evidence is available on this topic, mainly due to lack of data, especially in developing countries.

Against this background, this study aims to compare the policy actions and inequality in learning engagement among

children in three developing countries in Eastern Africa, namely Kenya, Uganda, and Malawi, using phone-based household survey data. We attempt to address the following key research questions: (1) During school closures, to what extent does children's learning engagement differ by the household head's education level? (2) During school closures, to what extent does the household head's education level affect children's learning engagement among those who do not use distance learning platforms? (3) How do these effects vary across countries with different development levels?

The remainder of this paper is organized as follows. The next section reviews the existing literature on educational inequalities and school closures during the COVID-19 pandemic. Section 3 compares the educational responses to the COVID-19 pandemic in Kenya, Uganda, and Malawi. Section 4 outlines the methodology, followed by the results in section 5. The final section provides discussion and conclusion.

2. Prior evidence on learning inequalities and COVID-19 pandemic

Studies have been conducted to compare the differences in policy measures undertaken by each country in response to the COVID-19 pandemic. As summarised by Rogers et al. (2020), all national education systems are threatened by the immediate impacts of school closures and the economic downturns caused as an inevitable consequence of the mitigation strategies against the pandemic (Rogers et al., 2020, p. 11). With regard to how governments have responded to the impact of school closures, most countries have introduced distance learning systems. However, early reviews have pointed out that there is a tremendous difference in the accessibility and effectiveness of these systems across countries, which widens learning inequalities between poor and rich countries as well as between the poor and the rich within the country, mainly because of the digital divide (Avanesian, Mizunoya & Amaro, 2021; Azevedo et al., 2021; Barron-Rodriguez et al., 2021; UNESCO, UNICEF & World Bank, 2020). While high-income countries could introduce a system that allows teachers and learners to have two-way interactions, low-income countries need to rely on one-way tools, including radio and television (TV) (Azevedo et al., 2021, p. 435). It is also worth noting that limited actions have been undertaken to support those who are excluded from the distance learning system (UNESCO, United Nations Children's Fund [UNICEF] & World Bank, 2020).

Although high-income countries have generally succeeded in establishing a distance learning system that can ensure at least equitable access to schooling during the pandemic, evidence repeatedly shows that the learning inequality has widened through the difference in its usage. A study using data from Denmark found that richer parents are more likely to take out children's digital books from public libraries, leading to an increase of the inequality of learning opportunities during the pandemic (Jæger & Blaabæk, 2020). In Germany, the reduction in learning time due to school closure was larger among low-achieving students than among high-achieving students (Grewenig et al., 2021). Rigorous evidence derived from high-frequency internet search data from the United States also reveals significant differences in engagement by schools and households in online resources by SES groups (Bacher-Hicks, Goodman & Mulhern, 2021).

In developing countries, where the overall infrastructure capacity is weaker than that in high-income countries, learning inequality primarily stems from the difference in accessibility to distance learning systems by SES groups (Avanesian, Mizunoya & Amaro, 2021). Moreover, a descriptive study found that learning inequality may also be attributed to the difference in parental education levels (Azevedo et al., 2021). Empirical studies have confirmed these trends. A study among four developing countries, namely Ethiopia, two states of India, Peru, and Vietnam, which uses phone survey data collected by Young Lives, found that students from wealthier and higher-educated households are more likely to experience distance learning (Hossain, 2021). Another study from India found that a digital divide is not only in access to but also in the effective use of learning technology among adolescents using the phone-based survey data collected by the UNICEF (Van Cappelle et al., 2021).

Even before the pandemic, sub-Saharan Africa has been known as a region where the learning crisis in basic education is more severe, and supporting infrastructure to use information and communication technology (ICT) for education is considerably more limited than in other regions (Bashir et al., 2018). The effectiveness of the distance learning system as an alternative for formal schooling during school closures has been questioned by early reviews (Asim, Carvalho & Gera, 2020; Crawford, 2020), while some innovative interventions, such as the provision of information via short messaging service (SMS), have been found to be effective in reducing the gap in low-income countries by facilitating learning engagement among the poor during school closures (e.g. Angrist, Bergman & Matsheng, 2020; Strategic Impact

Evaluation Fund, 2020). However, it is worth noting that, even during the initial period, as school closures became common, the United Nations (UN) Special Rapporteur on the right to education emphasized the use of “the simplest technology, such as printed material” (Boly-Barry, 2020, p. 10) to reach the vulnerable groups.

A more severe digital divide during the pandemic has been confirmed by a recent empirical study from Nigeria (Azubuike, Adegboye & Quadri, 2021). Moreover, a descriptive analysis based on the same phone-based survey data used in this study has revealed the inequality in learning activity by different SES groups as well as the heterogeneity in the popular type of activity among six sub-Saharan African countries, namely Burkina Faso, Ethiopia, Malawi, Mali, Nigeria, and Uganda (Dang et al., 2021). However, little effort has been made to investigate the inequality in learning engagement among children who are excluded from the distance learning system, even though they comprise a majority of the population. Particularly, in sub-Saharan African countries, there is a lack of studies that account for the country contexts in comparing them.

3. Comparing country contexts and responses for addressing learning inequalities amid the COVID-19 pandemic

3.1. Country contexts

The three selected countries in Eastern Africa represent different ranges of development levels, which helps us to explore the inter-country inequality in learning engagement status. Gross national income per capita is the highest in Kenya (USD 1,760), followed by Uganda (USD 800) and Malawi (USD 580) (World Bank, 2021c). According to the World Bank country classification for the 2022 fiscal year, Kenya is in the lower-middle-income group, while Uganda and Malawi are in the low-income group (World Bank, n.d.). A similar difference is observed in the educational development indicators. According to the grouping by Bashir et al. (2018), Kenya is in the “established” country while Uganda and Malawi are “emerged” countries in basic education development.

Table 1. Basic profile and trends in COVID-19 prevalence and mortality

	Kenya	Uganda	Malawi
Population (2020)	53,771,300	45,741,000	19,129,955
Gross national income per capita (2020)	USD 1,760	USD 800	USD 580
Date of first case reported	12 March 2020	21 March 2020	2 April 2020
Cases			
Cumulative total	258,557	128,578	63,408
Cumulative total per 100,000 population	480.85	281.10	331.46
Deaths			
Cumulative total	5,350	3,272	2,311
Cumulative total per 100,000 population	9.95	7.15	12.08
Case fatality rate	2.07%	2.5%	3.6%
First vaccination start date	5 March 2021	10 March 2021	11 March 2021
Number of persons vaccinated with at least one dose per 100 population	9.49	14.27	6.43

Note: COVID-19 data are the latest data available on 20 December 2021 from World Health Organization (2021b). The case fatality rate was calculated by dividing the number of cumulative total deaths by the number of cumulative total cases and multiplying the result by 100.

Source: Created by the authors based on World Health Organization (2021b) and World Bank (2021c)

Table 1 lists some key indicators related to COVID-19. The cumulative total number of confirmed cases per 100,000 population is the highest in Kenya, followed by Malawi and Uganda in that order. It is worth noting that the cumulative total of deaths per 100,000 population and the case fatality rate is the highest in Malawi, where the development level is the lowest among the three selected countries. Although all countries started vaccination around early March 2021, the vaccination rate remains low. The latest data show that the vaccination rate is the highest in Uganda and lowest in Malawi.

Interestingly, the three countries experienced different patterns of increase and decrease in COVID-19 confirmed cases. Figure 1 shows how the total number of weekly confirmed COVID-19 cases per 100,000 population changed over the period during which the data for this study were collected. Kenya was hit by three similar-sized waves during this period. Uganda seemed to succeed in preventing the spread of the virus at an early stage of the pandemic. However, it was hit by the first wave around mid-December in 2020, as well as the larger second wave in June 2021. In Malawi, the second peak was sharp, although the first peak was modest. The country also experienced a large third wave with a peak in late July 2021.

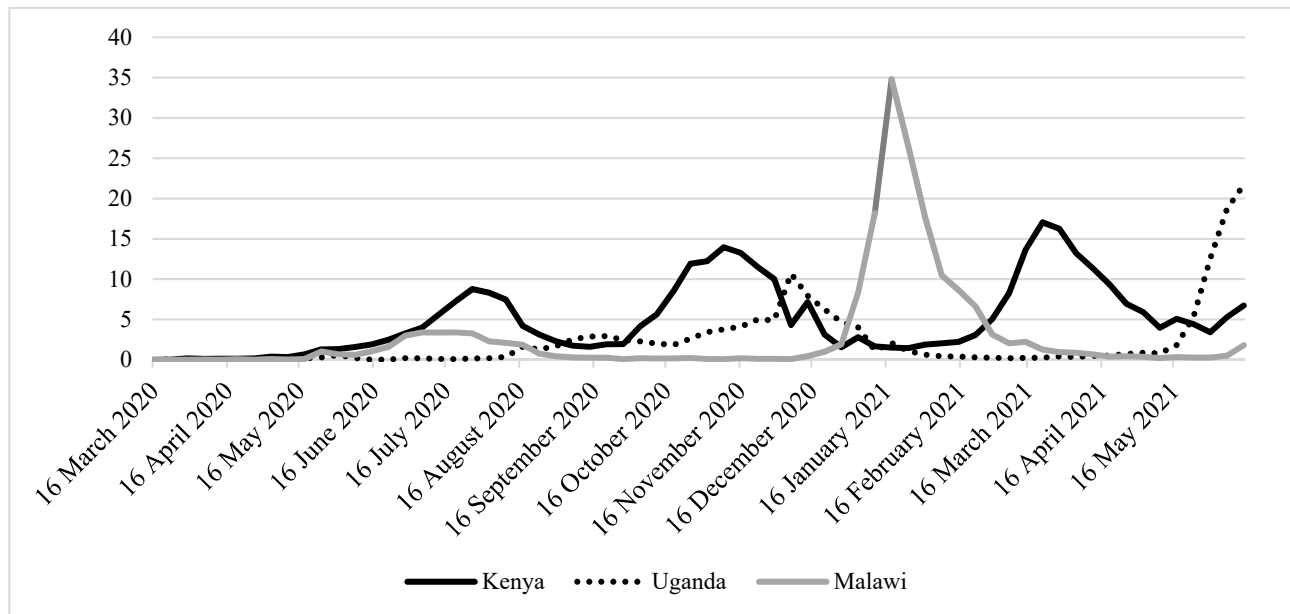


Figure 1. Total weekly confirmed COVID-19 cases per 100,000 population

Note: Total weekly COVID-19 confirmed cases is from World Health Organization (2021b). The total population in 2020 in World Bank (2021c) was used to calculate the number of cases per 100,000 population.

Source: Created by the authors based on World Health Organization (2021b) and World Bank (2021c)

3.2. Review of learning inequality and governments' early responses

According to UNESCO (2021a), as of 20 December 2021, the duration of full and partial school closures has been the longest in Uganda (83 weeks), followed by Kenya (37 weeks) and Malawi (26 weeks).³⁾ Uganda is identified globally as one of the countries which have closed schools for the longest period of time. Uganda fully reopened schools from March 2021 for a short period of time but closed them again in June 2021 in response to the harsh second wave.⁴⁾ Among the selected countries, Malawi first moved to the full reopening of schools in October 2020, which was then interrupted by the severe second wave. Schools were reclosed but fully opened again in February 2021. Kenya fully reopened schools in January 2021. The country responded to the third wave by prohibiting face-to-face classes in areas with high infection rates. A review of the available information about learning inequality and governments' early responses in each selected country is provided below.

3.2.1. School closures and responses by government

Schools were closed in the following order: Kenya, Uganda, and Malawi. In Kenya, schools were closed on 15 March 2020 after the first COVID-19 case in the country was confirmed on 12 March 2020. In Uganda, schools were closed on 18 March when no cases had yet been reported. Later, the first case was confirmed on 21 March 2020. In Malawi, schools were closed on 23 March 2020 and as in Uganda, the first case was confirmed on 2 April 2020 after the closure of schools. In Uganda and Malawi, proactive measures were taken even before the cases were confirmed, suggesting that school closure was already a global trend in preventing infectious diseases by that time. The Ugandan government has explained that this was a precautionary measure to avoid panic if educational institutions were closed after a case was confirmed and to avoid the possibility of schools contributing to the spread of the disease (Ministry of Education and Sports, Republic

of Uganda [MoES Uganda], 2020b).

Across the three countries, the governments promoted distance learning during school closures. However, from the beginning, there were concerns that online education would not reach the segments of the population that were poor. Compared with policies in other regions outside Africa, another similarity among the three countries is that interactive synchronous education is not recommended in their government policies. For example, a World Bank report on Kenya noted that the government relied primarily on one-way learning methods, such as radio and TV broadcasts and pre-recorded online lessons, rather than synchronous, interactive, and adaptive methods (Muñoz-Najar et al., 2021). Nevertheless, measures of policy in each country were announced and implemented relatively early after or even before school closures, where additional support measures for those most likely to be marginalized in distance education were considered.

In Kenya, the Ministry of Education published an initial educational response guideline on 24 March 2020 (Ministry of Education, Republic of Kenya [MoE Kenya], 2020a) and announced a more comprehensive plan in May of the same year to deal with the crisis in the basic education subsector caused by the pandemic (MoE Kenya, 2020b). The response plan, set for a period of one and a half years, was aimed at supporting learners and teachers in basic education institutions, with a particular focus on the most vulnerable and poor learners, including those with special needs and disabilities. Specifically, the plan aimed at supporting the promotion of online learning, providing teacher training to enable effective distance learning, reaching vulnerable groups, particularly girls & learners with special needs, and providing psychosocial support to school staff. In particular, for those who may find it difficult to stay in school, the plan included support such as the distribution of sanitary towels, scholarships for students in secondary schools, and mentorship programs to help boys and girls who had suffered gender-based violence to recover and continue their studies. The distribution of radios and TVs was also planned.

The learning response in Uganda mainly focused on the use of radio, rather than the less popular TV and Internet. The government announced in June 2020, that more than 10 million radio sets would be distributed to households across the country to support learning. According to MoES Uganda (2020a), four measures were identified to ensure continuous learning. These included radio lessons (with memory cards for students with special needs), printed self-study (with Braille or enlarged text for students with special visual needs), and TV lessons (with interpreters for hearing-impaired learners), which consciously show consideration for learners with special needs. Uganda's policy documents were also notable for their frequent references to refugees. It was noted that Uganda hosts 1.4 million refugees, the third highest number in the world, and the government proposed extra support for those children to access distance learning in collaboration with United Nations High Commissioner for Refugees (UNHCR) or UNICEF (MoES Uganda, 2020b; UNICEF in Uganda, 2021).

Lastly, in Malawi, in March 2020, the government announced its response policy from March to June 2020 (Ministry of Disaster Management Affairs and Public Events & Ministry of Health, Republic of Malawi [MoH Malawi], 2020). At that time, the number of infected people in Malawi had not been confirmed and schools were not closed. However, it also included information on what to do in the case of school closures. For example, the use of mass media in cooperation with telecommunication companies and the promotion of home learning, including e-learning. These included producing continuity programs to be broadcast and distributed on radio, TV, and the Internet; providing resources such as radios, textbooks, study guides, and equipment for the poorest children; ensuring that children with special educational needs and disabilities are included in continuity programs; identifying and treating the underlying factors, such as poverty and gender, which prevent children from continuing to learn; and promoting home learning. For example, the emergency radio program was broadcast to approximately six million primary school learners and ran from May 2020 until the end of the 2019/20 school year (Saka, 2021; UNICEF in Malawi, 2020).

3.2.2. Challenges caused by school closures

As described above, governments have been working to ensure learning opportunities during school closures, with the support of UN agencies. At the same time, however, concerns about the effectiveness of distance learning were raised at an early stage in the school closures (Boly-Barry, 2020; Saka, 2021). It was well anticipated from the outset that online learning could not be of use to the majority of people in areas where the online environment was not sufficiently developed. For example, according to the data on access to devices/connectivity and remote learning tools in three countries (pre-

pandemic data) presented by Barron-Rodriguez et al. (2021), even in Kenya, a country with the highest Internet penetration rate, only 17% have access to the Internet, 40% to TV, and 71% to radio. In Malawi, the country with the lowest rate, only 6% accessed the Internet, 11% had access to TV, and 33% had access to radio. In Uganda, access to the Internet (6%) and TV (17%) is as low as in Malawi but slightly higher for radio at 60%.

In Malawi, it is estimated that over 60% of primary and secondary school students did not have access to remote learning resources during school closures (Cavanagh, 2021). According to one interview conducted in Uganda, a 13-year-old student noted, “Homeschooling is not as efficient as learning in real life” (Byenkya, Ssenjobe & Ouma, 2020), and claimed “Radio classes are not specific and they do not explain the subjects well, or give examples. It is worse when it comes to self-study materials for children whose parents cannot read or write. The situation is very bad” (Byenkya, Ssenjobe & Ouma, 2020).

Aside from academic performance, there are also other concerns as a serious effect of school closure. For example, in Uganda, according to a document jointly published by several organisations on 27 March 2020, there were concerns that during periods of school closure, when children, including those with disabilities, were not provided with home learning practices as an alternative to school, they were at an increased risk of physical and sexual abuse, hazardous and exploitative work, child marriage, and early pregnancy (Catholic Relief Services et al., 2020). In particular, there was concern about the impact of domestic violence on girls. UNICEF has also noted a 20% increase in teenage pregnancies in the past 15 months and is concerned that the prolonged closure of schools has had a negative impact on other aspects of learning (UN, 2021).

To minimise this growing inequality and other negative effects caused by school closures, governments have made efforts to reopen schools. However, as schools restarted, additional problems concerning attendance and academic performance became apparent. For example, in Kenya, when schools were partially reopened in October 2020 for the first time after the initial school closure, it was mentioned that there was a difference in progress between some higher-level private schools that were working on the syllabus during school closures and public schools that were not and that students in lower-ranked private schools closed down due to school closures lost their schools to which they were supposed to return (Muchunguh, 2020; Nyamai, 2020).

Problems have also arisen with basic infection control measures, such as providing a hygienic environment and ensuring social distance. Ensuring the safety of teachers and students is a prerequisite for reopening schools, but it is not an easy task given the limited capacity of previous school facilities and class densities. In Malawi, the government was at odds with the Teachers Union, which demanded additional remuneration for working in schools at risk of infection. After two school closures, even though schools have finally reopened in February 2021, there have been problems with classes not being held due to teachers’ strikes (Cavanagh, 2021; Masina, 2021).

As outlined above, governments responded to the pandemic even before it entered the country and have been working with UN agencies and non-governmental organisations to develop distance learning during school closures. Policy documents have also repeatedly pointed to the need for additional approaches to marginalised groups. However, it is still questionable whether they have worked sufficiently in the face of existing immature learning infrastructure.

4. Method for the quantitative analysis

4.1. Data and variables

This study uses data collected through a high-frequency phone survey (HFPS) conducted by the national statistical office in each government in collaboration with the World Bank. “High-frequency” means that data is collected in the same households on a shorter cycle (monthly being the most common) than in traditional household surveys, where the surveyor visits each household. Compared to traditional face-to-face surveys, HFPS has some potential problems, including the reliability of the responses, the need to limit the number of questions taking into account the burden on the target respondents, and sampling bias which may be caused by not selecting households with no or inadequate access to a telephone (Tanner, 2021). However, with the rapid spread of mobile phones in developing countries, HFPS has already attracted attention as an efficient data collection method, especially in emergency situations where the safety of the researcher cannot be guaranteed, even before the COVID-19 pandemic. The reliability of the responses collected through HFPS has been confirmed by some empirical studies (Dabalen et al., 2016). The use of HFPS in conducting household-

level data is expanding rapidly worldwide during the COVID-19 pandemic.

Considering the burden of the respondents, HFPS only asks questions about the selected topics in each round.⁵⁾ The study only used cross-sectional data from one of the rounds, which were collected during the school closure and asked questions about education. Consequently, in analysing Kenyan data, the Round 3 data collected from 18 September to 28 November 2020, before the school was fully reopened in January 2021, were used. In analysing Ugandan data, the Round 4 data collected from 27 October to 17 November 2020, before the school was temporarily reopened in March 2021, were used. In the case of Malawi, the Round 1 data collected from 26 May to 14 June 2020, during the school closure responding to the first wave, were used. One notable limitation of this study is that the HFPS in Malawi did not collect educational data at the individual level during school closures; only household-level analysis is conducted using Malawian data. Due to this, the results of the analysis using Malawian data are presented as a reference only. We require the highest caution to simply compare the results from Malawi with those from the other two countries.

Limited types of variables are available to investigate the inequality of learning opportunities. Since the wealth variable is not available, this study only uses the variable representing the education level of the household head. The study also uses child/household characteristic variables which are commonly available and frequently used in modelling the standard demand function for schooling. The definition and summary statistics of all the variables used in this study are presented in Tables A1 and A2, respectively, in the appendix.

4.2. Estimation strategies

The linear probability model in Equation (1) is used to estimate the correlation between different individual/household factors and the probability of engaging in learning activities in Kenya and Uganda separately.⁶⁾ Here,

$$\Pr(L_{ij} = 1) = \beta_0 + \beta_E E_j + \beta_H H_j + \beta_I I_{ij} + \beta_L U_j + \varepsilon_{ij} \quad (1)$$

L_{ij} is a binomial explained variable indicating whether child i in household j engages in learning activities or not. β_0 is an intercept. E_j is a vector of dummy variables representing the highest education level completed by the head of household j , and β_E is a vector of their coefficients. H_j is a vector of the other characteristics of household j , and β_H is a vector of the corresponding coefficients. β_I is a vector of coefficients on the characteristics of child i in household j , I_{ij} , and β_L is the coefficient of household location, U_j . ε_{ij} is an error term. Clustered standard errors at the household level were calculated. The sample is restricted to primary and secondary school-aged children, who are 6-18 years old and 6-19 years old in Kenya and Uganda, respectively.

A significantly different structure of HFPS in Malawi only allows us to conduct a household-level analysis. The linear probability model is expressed as follows.

$$\Pr(L_j = 1) = \beta_0 + \beta_E E_j + \beta_H H_j + \beta_L L_j + \varepsilon_j \quad (2)$$

where L_j is a binomial explained variable indicating whether household j has a child who engages in learning activities or not. The sample is restricted to households with 6-18 years old children.

5. Findings: Inequalities in learning engagement

Descriptive statistics show that there was less serious inequality in school attendance among primary and secondary school-aged children in the three selected countries before the COVID-19 pandemic. As reported in Table A3 in the appendix, the primary school attendance rate is nearly 100% in all groups with different education levels of the household head in Kenya and Malawi, while the null hypothesis of equality is rejected in Uganda. However, descriptive statistics reveal more serious inequality in learning engagement during the pandemic. Table A3 also suggests that the learning activity gap increased in less developed countries. While a statistically significant difference was observed in Uganda and Malawi, a one-way analysis of variance test could not reject the null hypothesis of no difference in learning engagement among groups at the 5% significance level in Kenya: $F(3,708) = 1.57, p = 0.195$.

The study also descriptively analyses which primary and secondary school-aged children engaged in learning

activities during school closures. As shown in Figure A1, among those who engaged in learning activities during school closure, the highest proportion of them answered that they engaged in learning activities out of the distance learning system. In Kenya, 67% engaged in self-directed learning, and 16% engaged in learning through their parents. In Uganda, 42% engaged in learning by reviewing textbooks/notes from previous classes, and 12% engaged in learning through their parents. Although a simple comparison with the other two countries is not possible due to a different analytical unit, the result from Malawi shows that a relatively high proportion of households with children engaging in learning activities relied on the radio program. Malawian data also shows that more households obtained learning engagement opportunities through means other than interacting with teachers/tutors and/or utilising distance learning platforms.

In order to see the effect of the household head's educational level, controlling for other factors, we added the available covariates step by step. The study is also interested in investigating the extent to which the inequality in learning engagement exists when the sample is restricted to those who did not use distance learning platforms. Table 2 shows the ordinary least squares regression results from the analysis with all data (models 1, 3, and 5) and from the data restricted to those without using distance learning (models 2, 4, and 6) separately for each country.

In Kenya, the results show a statistically significant difference between children with household heads who did not complete primary education and who have completed primary education, while controlling for other factors. The coefficient remained significant at the 5% level after restricting the sample. However, the other coefficients are not statistically significant. The results from Uganda confirm a clearer inequality trend. In Uganda, compared with the base group, having a household head with partial or completed post-secondary education increased the probability of engaging with learning activities during the school closure by 0.15 points ($p < 0.001$). After dropping the sample using distance learning, this effect size decreased but was still found to be significant at the 5% level.

Table 2. The probability of engaging learning by different individual/household factors

	Dependent variable: Learning engagement					
	Kenya		Uganda		Malawi	
	Out-of-school children aged 6-18 in Round 3		Out-of-school children aged 6-19 in Round 4		Households with 6-18 years old children in Round 1	
	All	Not using distance learning tools	All	Not using distance learning tools	All	Not using distance learning tools
	(1)	(2)	(3)	(4)	(5)	(6)
Household head education level (Base: incomplete primary)						
Completed primary	0.13* (0.06)	0.12* (0.06)	0.03 (0.02)	-0.005 (0.02)	0.11*** (0.02)	0.07** (0.02)
Completed secondary	0.06 (0.06)	0.04 (0.06)	0.006 (0.06)	0.01 (0.05)	0.10** (0.03)	0.07* (0.03)
Partial or completed post-secondary	0.13 (0.07)	0.12 (0.07)	0.15*** (0.04)	0.09* (0.04)	0.27*** (0.04)	0.14*** (0.04)
Female	0.02 (0.04)	0.01 (0.04)	0.04* (0.01)	0.04* (0.01)		
Household size	0.006 (0.01)	0.008 (0.01)	-0.002 (0.005)	-0.004 (0.005)	0.005 (0.005)	0.005 (0.005)
Urban	-0.01 (0.04)	-0.01 (0.04)	0.06* (0.03)	0.02 (0.03)	0.07** (0.02)	0.06** (0.02)
Schooling before school closure (Base: No attendance)						
Government	0.16 (0.19)	0.13 (0.19)	0.31*** (0.02)	0.26*** (0.02)		
Non-government	0.01 (0.05)	0.27 (0.20)	0.36 (0.03)	0.30*** (0.03)		
Constant	0.08 (0.09)	0.12 (0.22)	0.03 (0.05)	0.12* (0.05)		
Regional dummies	No	No	Yes	Yes	Yes	Yes
R-squared	0.07	0.07	0.13	0.13	0.06	0.05
Number of observations	712	662	4,015	3,734	1,201	1,114

Note: Age dummies are included in all models. Robust standard errors are indicated in parentheses. * $p < 0.05$; ** $p < 0.01$; *** $p < 0.001$. Clustered standard errors at the household level were calculated in models 1-4.

Source: Calculated by the authors using Uganda Bureau of Statistics (2021), World Bank (2021a, 2021b)

Although the simple comparison requires careful attention, analysis using household-level data from Malawi shows a different trend, suggesting wider inequality in general. The regression results show a significant gap between households with household heads who completed primary/secondary education and household heads who did not complete primary education. A significantly larger gap is also observed between households with household heads who have completed secondary education and households in the base group. Moreover, although the effect size decreases as we restrict the sample to those who did not use distance learning platforms, the coefficients of all dummy variables are still significant at the 5% significance level.

6. Discussion and tentative conclusion

School closure has become a common policy tool used as part of social distancing measures in response to the COVID-19 pandemic across the world. To mitigate the negative impact of the learning loss caused by school closures, countries have made significant efforts, mainly by providing distance learning opportunities. In the sub-Saharan African context, countries had already been facing severe learning crises before the pandemic (Bashir et al., 2018) although they more or less had succeeded in ensuring equitable access to schooling for primary education after the introduction of universal primary education policy (Nishimura & Ogawa, 2015). This paper provides a quick snapshot of the reality of inequality of access to learning opportunities amid the COVID-19 pandemic from three countries in Eastern Africa.

Reflecting the limited ICT infrastructure in the region, a review of the policy documents reveals countries generally introduced a strategy to deliver one-way distancing learning programs, such as radio, combined with targeted support packages for vulnerable groups. Government reports, including the ones which use the evidence from the same data used in this study, tend to emphasise the importance of strengthening the distance learning infrastructure. However, even though our study used data from samples limited to households with phones and enough capacity to respond to the questions through phones, our descriptive analysis reveals a more realistic picture: only a very limited proportion of children enjoyed the online distance learning tools developed by governments. This is consistent with the previous empirical studies finding the widening learning inequality due to the digital divide during the pandemic in developing countries (Azubuike, Adegboye & Quadri, 2021; Dang et al., 2021; Hossain, 2021).

The evidence also suggests that learning engagement is more limited in less developed countries. In addition, the evidence suggests that children in more developed sub-Saharan African countries are more likely to engage in learning by relying on their self-efforts rather than on expensive distance learning tools. Moreover, the overall finding implies that the inequality in learning engagement persists among children who continue their learning utilising existing resources, while the inequality among this group is more severe in less developed countries with less educated household members.

These findings are far from conclusive and more rigorous studies should be conducted in the future. However, this paper sheds light on the realities of widening learning inequality during school closures in the sub-Saharan African context. Policies that promote distance learning seem to leave out most school-aged children. As recommended by Boly-Barry (2020), from a human rights perspective, it is suggested for the governments to mainstream and strengthen more realistic no-tech solutions, including the use of paper-based materials in regular curricula, as they address the issue of learning engagement gaps that exist among the majority who are out of both high-tech and low-tech solutions and prepare for future school closures.

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Notes

- 1) After nearly a couple of weeks, the first COVID-19 case in the sub-Saharan Africa region was confirmed in Nigeria on 27 February 2020 (Nigeria Centre for Disease Control, 2020).
- 2) These figures are calculated based on the latest data available on 20 December 2021 in WHO (2021a, 2021b). They use WHO's regional grouping of countries, which is different from that used by other UN institutions. In the WHO's grouping, countries in Africa include most of the countries in sub-Saharan Africa and Algeria.
- 3) According to UNESCO (2021a), full school closures refer to situations in which all schools were closed at the nationwide level due to COVID-19. Partial school closures refer to school closures in some regions, or for some grades, or with reduced in-person instruction.
- 4) Schools in Uganda are still closed as of December 2021.
- 5) In this study, the term "round" is used to refer to each distinct occasion when data are collected from the samples in HFPS.
- 6) Although using probit/logistic regression models has become a convention when the dependent variable is dichotomous, this study applied a linear probability model because it can offer a marginal effect, which is identical to the one obtained from probit/logistic regression models, without requiring additional complex computation, as argued by some scholars (e.g. Hellevik, 2009).

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Appendix

Table A1. Definition of variables

	Kenya	Uganda	Malawi
Learning engagement	Individual-level dummy variable indicating the child is engaged in any education or learning activities during the week before the interview in Round 3	Individual-level dummy variable indicating the child is engaged in any education or learning activity within a seven-day period before the interview in Round 4	Household-level dummy variable indicating if children in the household are engaged in any education or learning activities during the week before the interview in Round 1
Using distance learning tools	Individual-level dummy variable indicating the child has access to education/learning through “online,” “radio,” or “TV” in Round 3	Individual-level dummy variable indicating the child is engaged in education/learning by using “mobile learning apps,” watching “educational TV programs,” or listening to “educational program on radio” in Round 4	Household-level dummy variable indicating if children in the household engaged in education/learning by using “mobile learning apps,” watching “educational TV programs,” or listening to “educational program on radio” in Round 1
Household head education level			
Incomplete primary	Dummy variable indicating household head completed “no formal education” or “pre-primary” in Round 2	Dummy variable indicating household head completed “no school” or “some primary” in Round 1	Dummy variable indicating household head completed “no school” or “some primary” in Round 1
Completed primary	Dummy variable indicating household head completed “primary” in Round 2	Dummy variable indicating household head completed “primary” or “some secondary” in Round 1	Dummy variable indicating household head completed “primary” or “some secondary” in Round 1
Completed secondary	Dummy variable indicating household head completed “post-primary, vocational” or “secondary” in Round 2	Dummy variable indicating household head completed “secondary” in Round 1	Dummy variable indicating household head completed “secondary” in Round 1
Partial or completed post-secondary	Dummy variable indicating household head completed “college, middle level,” “university, undergraduate,” or “university, postgraduate” in Round 2	Dummy variable indicating household head completed “university degree,” “master degree,” “diploma,” or “certificate” in Round 1	Dummy variable indicating household head completed “university degree,” “master degree,” “diploma,” or “certificate” in Round 1
Age	Dummy variables for child’s age (base category=6 years old)		Not applicable
Female	Dummy variable for child’s gender (base category = male)		Not applicable
Household size	Number of household members in Round 3	Number of household members in Round 1	Number of household members in Round 1
Urban	Dummy variable indicating that household lives in urban area (base category= rural or refugee camp) in Round 3	Dummy variable indicating that household lives in urban or “other urban” area (base=rural) in Round 4	Dummy variable indicating that household lives in urban area (base=rural) in Round 1
Region	Not available	Dummy variables indicating that the household lives in “Central,” “Eastern,” “Western,” or “Northern” region	Dummy variables indicating that the household lives in “North,” “Central,” or “Southern” region in Round 1
Schooling before school closure			
No attendance of school before school closure	Dummy variable indicating child did not attend school before school closure from Round 4 data	Dummy variable indicating child did not attend school before school closure from Round 4 data	Household-level dummy variable indicating if any children in the household did not attend school before school closure from Round 1 data
Attended government school before school closure	Dummy variable indicating child attended “public” school before school closure from Round 4 data	Dummy variable indicating child attends “government” school before school closure from Round 4 data	Not applicable
Attended non-government school before school closure	Dummy variable indicating child attended “private,” “both” public and private school before school closure from Round 4 data	Dummy variable indicating child attended “private,” “NGO,” “religious,” or “other” school before school closure from Round 4 data	Not applicable

Note: In Kenya and Uganda, the variable on household head education level is only available in Round 2 and Round 1, respectively. In Uganda, the household size variable is only available in Round 1. In Kenya, valid information for the variable on schooling before school closure was only available in Round 4. Regional dummy variables are not available for Kenya.

Table A2. Descriptive statistics

	Kenya			Uganda			Malawi		
	Individual level			Individual level			Household level		
	Out of school children aged 6-18 years old in Round 3			Out of school children aged 6-19 years old in Round 4			Households with 6-18 years old children in Round 1		
	All	Some learning	No learning	All	Some learning	No learning	All	Some learning	No learning
Learning engagement	0.56 (0.50)			0.33 (0.47)			0.18 (0.39)		
Using distance learning tools	0.07 (0.26)	0.13 (0.33)		0.07 (0.26)	0.21 (0.41)		0.07 (0.26)	0.40 (0.49)	
Household head education level									
Incomplete primary	0.13 (0.33)	0.11 (0.32)	0.14 (0.35)	0.52 (0.50)	0.45 (0.50)	0.55 (0.50)	0.43 (0.50)	0.23 (0.42)	0.48 (0.50)
Completed primary	0.37 (0.48)	0.40 (0.49)	0.34 (0.47)	0.34 (0.47)	0.36 (0.48)	0.33 (0.47)	0.35 (0.48)	0.44 (0.50)	0.33 (0.47)
Completed secondary	0.33 (0.47)	0.31 (0.46)	0.36 (0.48)	0.04 (0.19)	0.03 (0.18)	0.04 (0.19)	0.15 (0.36)	0.18 (0.38)	0.14 (0.35)
Partial or completed post-secondary	0.17 (0.37)	0.17 (0.38)	0.16 (0.37)	0.10 (0.30)	0.15 (0.36)	0.08 (0.27)	0.07 (0.26)	0.15 (0.38)	0.05 (0.22)
Age (continuous)	11.53 (3.33)	12.16 (3.25)	10.73 (3.26)	11.38 (3.58)	11.60 (3.39)	11.26 (3.66)			
Female	0.48 (0.50)	0.48 (0.50)	0.47 (0.50)	0.51 (0.50)	0.54 (0.50)	0.49 (0.50)			
Household size	5.30 (1.95)	5.34 (1.92)	5.25 (2.00)	7.20 (2.75)	7.08 (2.63)	7.26 (2.81)	5.81 (2.07)	5.91 (2.19)	5.79 (2.04)
Urban	0.50 (0.50)	0.50 (0.50)	0.51 (0.50)	0.19 (0.39)	0.26 (0.44)	0.15 (0.36)	0.35 (0.48)	0.50 (0.50)	0.32 (0.47)
Schooling status before school closure									
No attendance	0.006 (0.08)	0.003 (0.05)	0.010 (0.10)	0.09 (0.29)	0.004 (0.07)	0.13 (0.34)	0.00 (0.00)		
Attended government school	0.90 (0.30)	0.89 (0.31)	0.91 (0.29)	0.53 (0.50)	0.51 (0.50)	0.54 (0.50)			
Attended non-government school	0.10 (0.29)	0.11 (0.31)	0.083 (0.28)	0.38 (0.49)	0.48 (0.50)	0.33 (0.47)			
Number of observations	712	397	315	4,015	1,342	2,673	1,201	218	983

Note: Standard deviations are in parentheses.

Source: Calculated by the authors using Uganda Bureau of Statistics (2021), World Bank (2021a, 2021b)

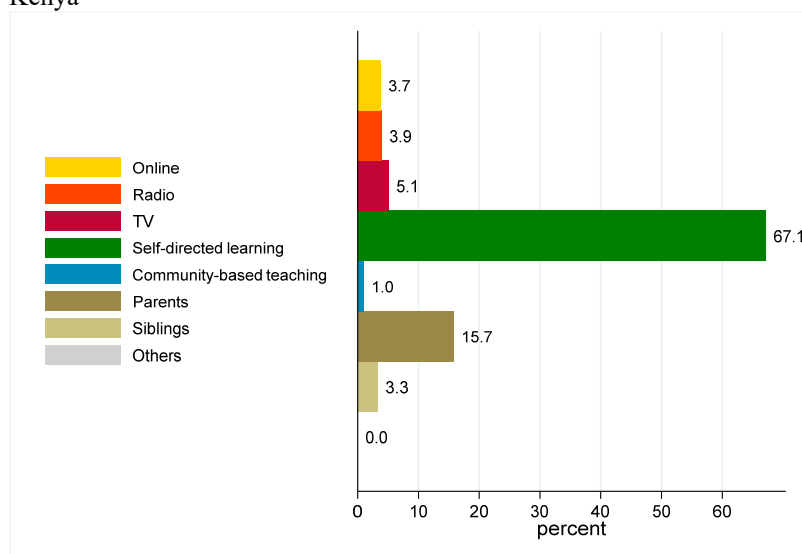
Table A3. Children's access to schooling/learning by household head education level

	Household head education level				<i>P</i> -value
	Incomplete primary	Completed primary	Completed secondary	Partial or completed post-secondary	
Access to schooling before school closure					
Kenya	1.000	0.996	0.992	0.992	0.760
Uganda	0.875	0.944	0.938	0.954	0.000
Malawi	1.000	1.000	1.000	1.000	
Access to learning amid school closure					
Kenya	0.500	0.602	0.521	0.575	0.195
Uganda	0.292	0.355	0.310	0.488	0.000
Malawi	0.098	0.227	0.218	0.393	0.000

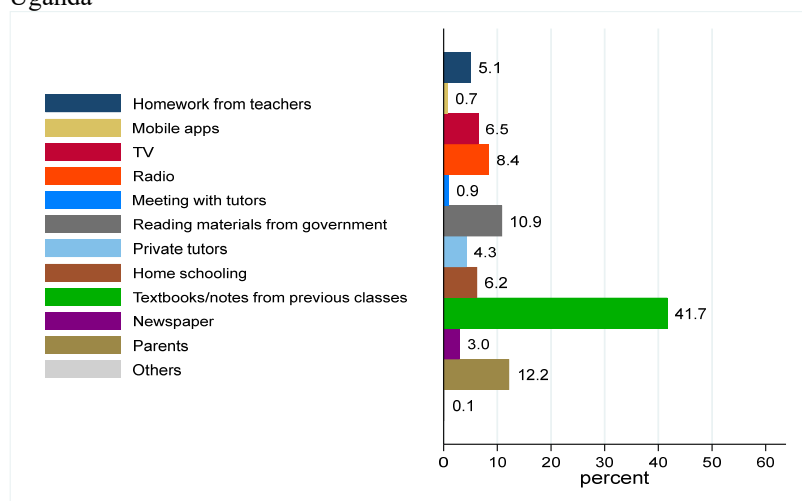
Note: In Kenya and Uganda, the ratio of children attending school and the ratio of children engaged in learning are reported using individual data. In Malawi, the ratio of households with children attending school and the ratio of households with children engaged in learning are reported using household data. *P*-value is for the *F*-test of equality for all four groups.

Source: Calculated by the authors using Uganda Bureau of Statistics (2021), World Bank (2021a, 2021b)

Kenya



Uganda



Malawi

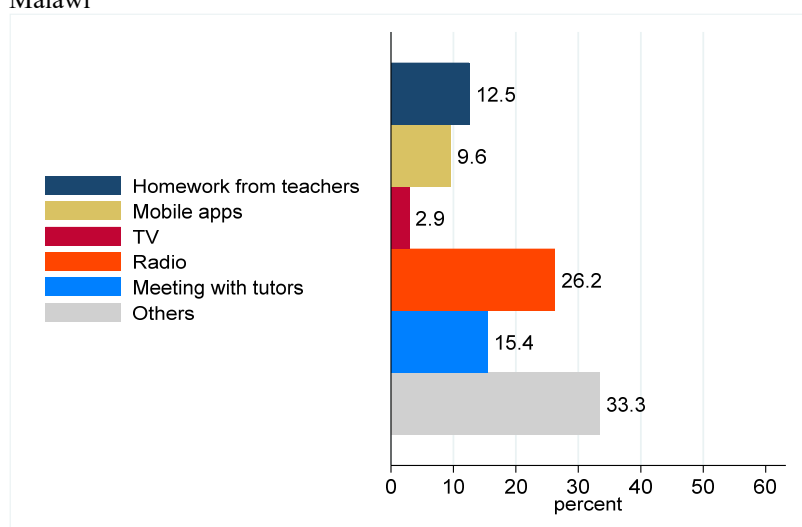


Figure A1. Percentage of children engaging learning by different means

Note: In Malawi, the ratio of households with children engaging in learning in each mean is reported using household data.
 Source: Calculated by the authors using Uganda Bureau of Statistics (2021), World Bank (2021a, 2021b)

The Prospect of Education Universalisation and Inequality in African Countries Aspiring to Be
Middle-Income Countries:
A Comparative Study of Thailand, Kenya, and Uganda

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Abstract

This paper aims to formulate a challenging comparative study of three countries at different stages of economic growth—Thailand, Kenya, and Uganda—with regards to: (1) the current state of education universalisation and inequality, (2) the direction of each of their national visions and education policies, and (3) each of their efforts to reduce inequalities. The results of this study indicate the following: (1) While the universalisation of primary education has been commonly achieved, there are major gaps in the degree of universalisation in secondary and tertiary education progression, and regional education inequality prevails in the three countries. (2) All three countries aim to develop into high- or middle-income countries, as a measure of economic growth. In the case of Thailand, education is divided between extending education for children from middle- and higher-income groups and education for children experiencing hardships. Meanwhile, in Kenya and Uganda, it was found that bottom-up measures, such as improving access to education, equity, and literacy, were being undertaken, along with a simultaneous emphasis on science, technology, innovation, and human resource development in the technical and vocational education and training (TVET) field, reflecting the priority industries of each country. (3) While it was evident that each country developed tailored programs for key areas to correct educational inequalities, organising entities were established in all of them in the following chronological order: Uganda, Kenya, and Thailand. These can be thought to reflect differences in the perception of such inequalities. While Thailand accepts disparities as given, Kenya aims to ensure access and equity in education, whereas Uganda guarantees access to education and literacy, specifically focusing on equity.

Keywords: International comparison, universalisation, inequality in education, TVET

1. Introduction

1.1. Aim

This study conducts a comparative investigation of three countries at different stages of economic growth, comparing how education, especially secondary and tertiary education, is positioned within each country's economic growth policy and national vision. The purpose is to examine the future of education universalisation and inequality among African countries aiming to become middle-income countries.

Sato's (2016) comparative analysis of countries caught in the middle-income trap (Thailand, Malaysia, Mexico, Argentina, Chile, and Brazil) with countries that avoided this trap to become high-income countries (Japan, Korea, and Singapore) revealed the importance of increasing the proportion of the population with secondary or higher education levels and the accumulation of human capital. For example, considering its improvement and expansion of higher education, Thailand has been experiencing difficulties in balancing expanding opportunities for higher education with countering income inequality, such as the economic power of the household. In Thailand, measures to correct income inequalities are a factor leading to societal divisions and long-term political instability (Oizumi, 2014). Additionally, measures have been taken since 2018 to directly correct prevailing educational inequality.

This study examines the prospect of education universalisation and inequalities in African countries seeking to become middle-income countries, that is, Kenya, a lower-middle-income country, and Uganda, which continues to be a low-income country, through a side-by-side comparison with Thailand, an upper-middle-income country (Bereday, 1964;

Manson, 2014). Specifically, a comparison table for the three countries is created around four points of comparison: (1) the current situation of education universalisation and inequality, (2) national vision, (3) secondary and tertiary education reform trends, and (4) organisations responsible for correcting education inequalities. Following this, a comparative analysis and discussion are carried out. Furthermore, abstraction is performed in the comparative analysis and discussion. As such, there may be some cases of insufficiently relevant context for each of the three countries. Conversely, without any abstraction, a true comparative analysis would not be possible, and the conclusion would merely be that the three countries are different. Although comparative analysis remains a rough measure, the purpose of the study is sufficiently fulfilled if it provides a viewpoint from which to study other African countries aiming to become middle-income countries.

1.2. Overview of the countries studied

Thailand (also known as the Kingdom of Thailand) is the only country in Southeast Asia that has survived colonisation and maintained its independence. Situated in a savannah climate region, Thailand experiences a tropical climate, with rainy and dry seasons. It has 66.41 million people living on an area of land approximately 1.4 times larger than Japan (Ministry of Foreign Affairs, 2020). Its pro-American, anti-communist development system (developmental dictatorship) has been in place since the late 1950s, and with abundant support from the United States, has promoted ‘top-down societal transformation’ (Suehiro, 1993, p. 36), involving broad non-autonomous national development, including economic, regional, educational, agricultural, and logistic development (Suehiro, 1993). Previously, as an agricultural country, it was called a ‘rice-planting nation’ (Yano, 1975, p. 112–114). However, since the 1985 ‘Plaza Agreement’ (the accord among the G-5 nations, France, Germany, the United States, the United Kingdom, and Japan, to manipulate exchange rates), the expansion of Japanese companies and Asian newly industrialised economies (NIEs) has accelerated, enabling the transition of Thailand from an agricultural to an industrial country (Suehiro, 2009). In 2020, the ratio of real gross domestic product (GDP) by industry was 8.6% in agriculture, forestry, and fisheries and 25.2% in the manufacturing industry (IDE-JETRO, 2021, p. vi), with the main focus being manufacturing (automobile industry) (Funatsu and Tsukada, 2021).

In terms of school education, primary education has expanded quantitatively since the ‘Era of development’ (a period of authoritarian regimes lasting from 1958 to 1972) (Notsu, 2005; Suehiro, 2000). Secondary education, which had previously been sluggish, soared from 39.7% to 74.2% during the short period of 1990–1997, with the introduction of a lower-secondary curriculum attached to primary schools, alongside awareness campaigns for parents and children regarding free tuition, textbooks, school lunches, and scholarships (Minoura and Notsu, 1998). Higher education has expanded from open universities (i.e., universities with open admission that do not require an entrance exam) established in the 1970s and is progressing towards mass and universal access (Suzuki and Kampeeraparb, 2018).

Kenya (also known as the Republic of Kenya [RoK]), an East African country, declared independence from British occupation in 1963. Its first census after independence showed that its population was approximately 10,900,000 in 1969. According to the latest Population and Housing Census, its population is approximately 47,564,300 people, with a population density of 82 people per square kilometre (RoK, 2019c), indicating a noticeable increase. Located directly below the equator, the coastal region experiences the savannah climate, while the central and northern areas are arid and semi-arid regions. At the time of independence, it was poorer than other African countries, with a per capita GDP of approximately 55% of the African average. Its GDP rose sharply in the 2000s. However, even in 2007, its GDP per capita was around 76% of the African average. Agriculture is the major industry in Kenya, accounting for about one-third of the economy. While the service industry is experiencing growth, the agriculture, forestry, and fishery industries retain a large share of its economy (RoK, 2020). In 2017, Kenya reached the African average, and has surpassed it since 2018 (World Bank database). While Kenya is experiencing economic growth, it has a high level of domestic inequality compared to other countries. According to a report released in the 1990s, its Gini index (a measure of statistical dispersion representing income inequality) at that time was between 48 and 70, a higher level than that of the neighbouring countries Uganda (26.6–43.9), and South Africa (48–62), a country renowned for great inequality (Society for International Development [SID], 2010). However, prior to the millennium, the idea that economic growth and inequality would co-exist (waiting for the trickledown effect) was not highlighted as a major issue. Since the 2000s, the Kenyan government has also begun to focus on the issue of inequality (SID, 2010).

Regarding school education in Kenya, in 2018, the gross and net enrolment rates for primary education was 104.0% and 92.4%, respectively, and that for secondary education was 70.3% and 53.2%, respectively (RoK, 2019a). When compared with the African average for the same year, it is clear that education universalisation was becoming more prevalent during this time (Ogawa, 2020). The gross enrolment rate for tertiary education was 4.2% in 2003 and 6.6% in 2008; then, it increased to 12.7% in 2014 (The UNESCO Institute for Statistics [UIS] database), and the number of enrolments increased from 190,000 (in 2005) to 710,000 (in 2015) (Kenya National Bureau of Statistics [KNBS], 2018). The freedom to participate in competitive education and the sluggish agricultural, fishery, and cattle industries are rapidly elevating access to tertiary education levels. However, economic growth is not necessarily simultaneous, and unemployment of tertiary-education graduates, like the case in India, can occur. For example, the employment rate of graduates from the University of Nairobi, which is one of the most popular universities in Kenya, was less than 40% of the 2019–2020 academic year (University of Nairobi [UoN], 2020). Launched in 2008, ‘Kenya Vision 2030’ has positioned scientific and technological innovation as a crucial element (Nakata and Tanaka, 2012) in the mission ‘to transform Kenya into a newly industrializing, middle-income country providing a high quality of life to all its citizens by 2030 in a clean and secure environment’.

Uganda (also known as the Republic of Uganda), like Kenya, was a British colony which declared independence in 1962. In 1922, during the colonial period, the first technical school, the predecessor of Makerere University, was established as the only higher-education institution in East Africa at the time (Oloka-Onyango, 1992). The capital, Kampala, was also the centre of the area’s academic studies; however, it endured significant long-term domestic turmoil due to repeated coups d’état, civil war, and the war with Tanzania (Sejjaaka, 2004). In particular, during the 1970s, under the military dictatorship regime of Idi Amin, as many as 300,000 people, including intellectuals and educators, were killed (Amnesty International, 1979). Finally, the National Resistance Movement, led by President Yoweri Museveni, stabilised the political conditions after gaining power in 1986. In 1997, Uganda became the first country, worldwide, to qualify for the Heavily Indebted Poor Countries Initiative—the first global response initiative to offer comprehensive debt relief to developing countries with high levels of poverty, launched by the International Monetary Fund and the World Bank in 1996 (World Bank, 2004); thus, development policies based on Uganda’s ‘Poverty Reduction Strategy’ were adopted; however, it remains a low-income country. More than 75% of the population are young people, under the age of 30 years, and this percentage is continuing to rise (Uganda Bureau of Statistics [UBOS], 2021).

In comparison to Kenya, Uganda’s Universal Primary Education policy—launched in 1997—was one step ahead, resulting in relatively high performance in access to this education level; as of 2016, the gross enrolment rate for primary education was 115%, with a net enrolment rate of 96% (Ministry of Education and Sports [MoES], 2017). In contrast, the gross secondary enrolment rate was 27.1%, with a net enrolment rate of 24% (MoES, 2017). This remains low even after the adoption of the Universal Secondary Education policy in 2007. The agricultural sector is consistent and reliable across the country, except for some sub-regions, ensuring a certain standard of living. This may partly explain the lagging industry modernisation and productivity growth. Its education inequality has been widening, as indicated by the significant growth of private schools in urban areas (Härmä et al., 2017) and the stagnation of rural areas and other specific regions (northern and eastern) (Nakabugo, 2015; Sakaue, 2014). Moreover, these educational inequalities are rooted in the various inequality issues that are entrenched within its society.

2. The current state of education universalisation and inequality

In this section, we review the current state of education universalisation and inequality in Thailand, Kenya, and Uganda, presenting some descriptive statistics. Figure 1 shows the change in the gross enrolment rate by level of education: primary, secondary, and tertiary education. Although the gross enrolment rate is used, it clearly indicates that the primary education stage in all three countries is almost universal. Meanwhile, there is a large gap between Thailand and Kenya, and between Kenya and Uganda, concerning secondary education. Furthermore, although Kenya has exhibited significant growth at the tertiary education stage in recent years, large differences are evident between Thailand and Kenya and Kenya and Uganda.

Next, educational inequality, and regional disparity in particular, are verified through the examination of the household educational composition according to region. Due to data-related difficulties in creating a combined display, each

country's data is presented individually. Figure 2 illustrates households in Thailand, which have been organised by level of completed education and region.

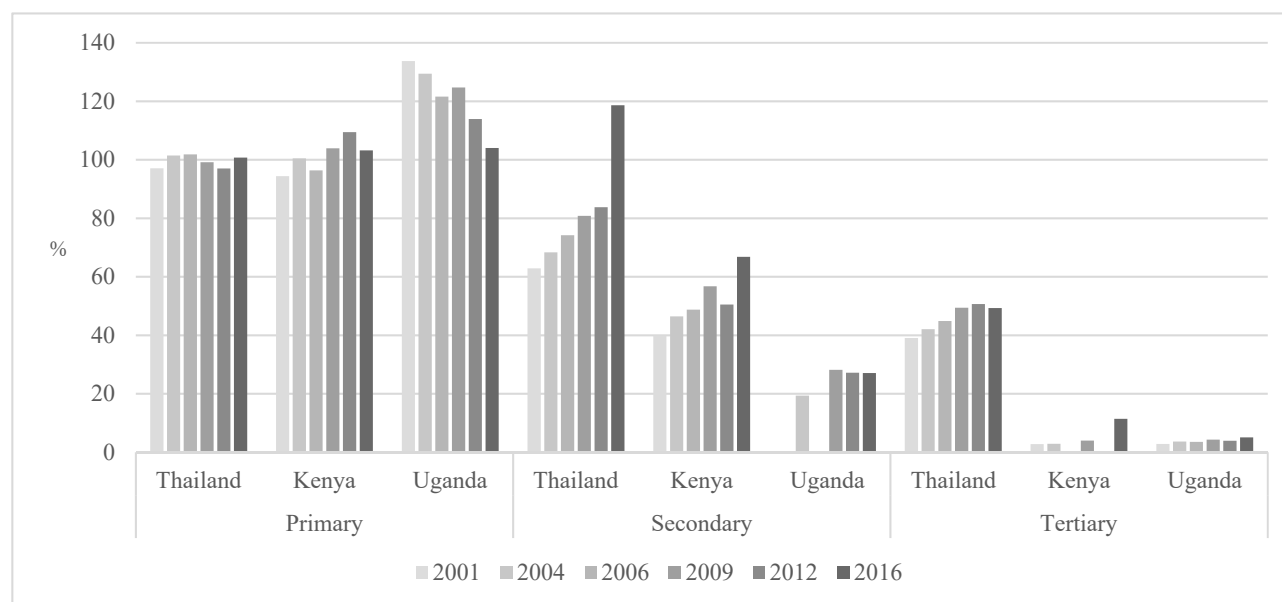


Figure 1. Gross enrolment rate by education level in Thailand, Kenya, and Uganda

Notes: Gross enrolment rate of secondary education in 2012 and 2016 in Kenya is from the Ministry of Education (2017). Gross enrolment rate of secondary education in 2009, 2012, and 2016 is from MoES (2017). All the other statistics are from the World Bank database.
Source: Created by the authors based on Ministry of Education (2017), MoES (2017), and the World Bank database

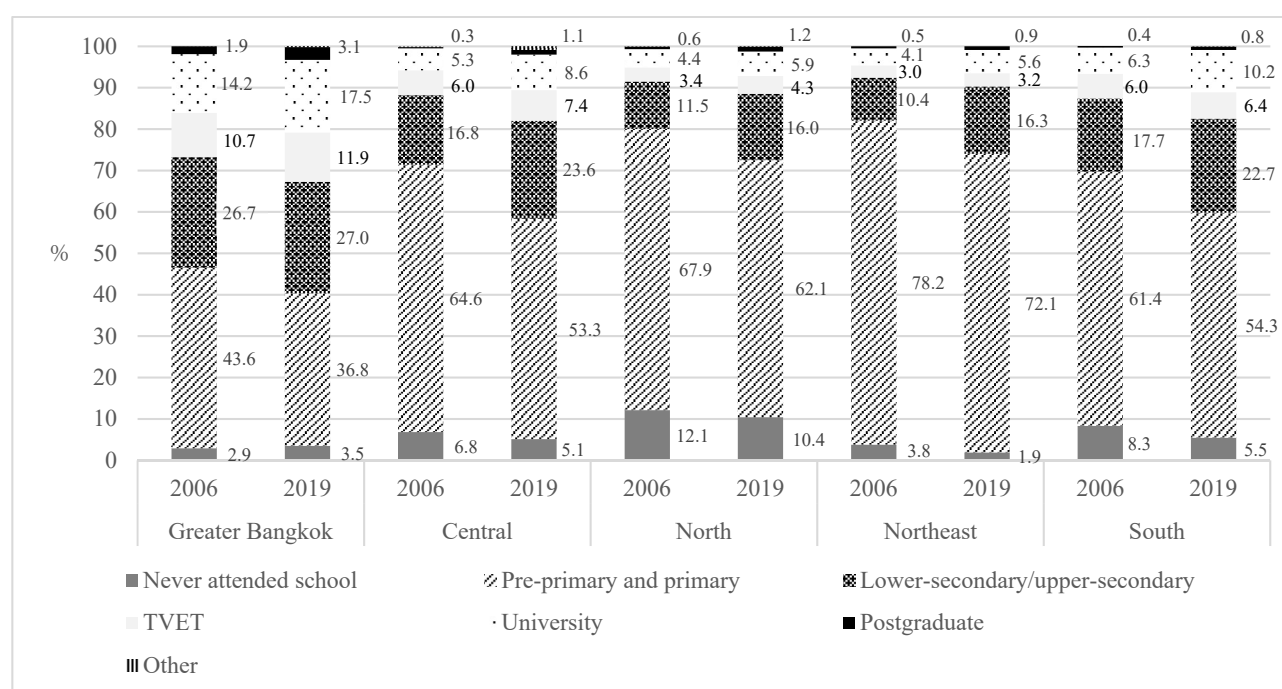


Figure 2. Percentage of households by level of completed education and region in Thailand

Notes: TVET = technical and vocational education and training

Source: Created by the authors based on National Statistical Office (NSO) (2010) and NSO (2020)

The case of Thailand clearly illustrates the so-called ‘primate city’ of Bangkok. For example, the majority of Bangkok households have completed an educational degree above the secondary level. Moreover, in 2019, the number of

households with education attainment above a secondary level can be seen to increase in the central and southern regions at a rate nearing a majority. In the northern and north-eastern regions, 60 to 70% of students have completed their primary education, which is significantly different from the case in Bangkok. Next, we consider Kenya (Figure 3). The Kenyan data is characterised by the broad distinction between urban and rural areas.

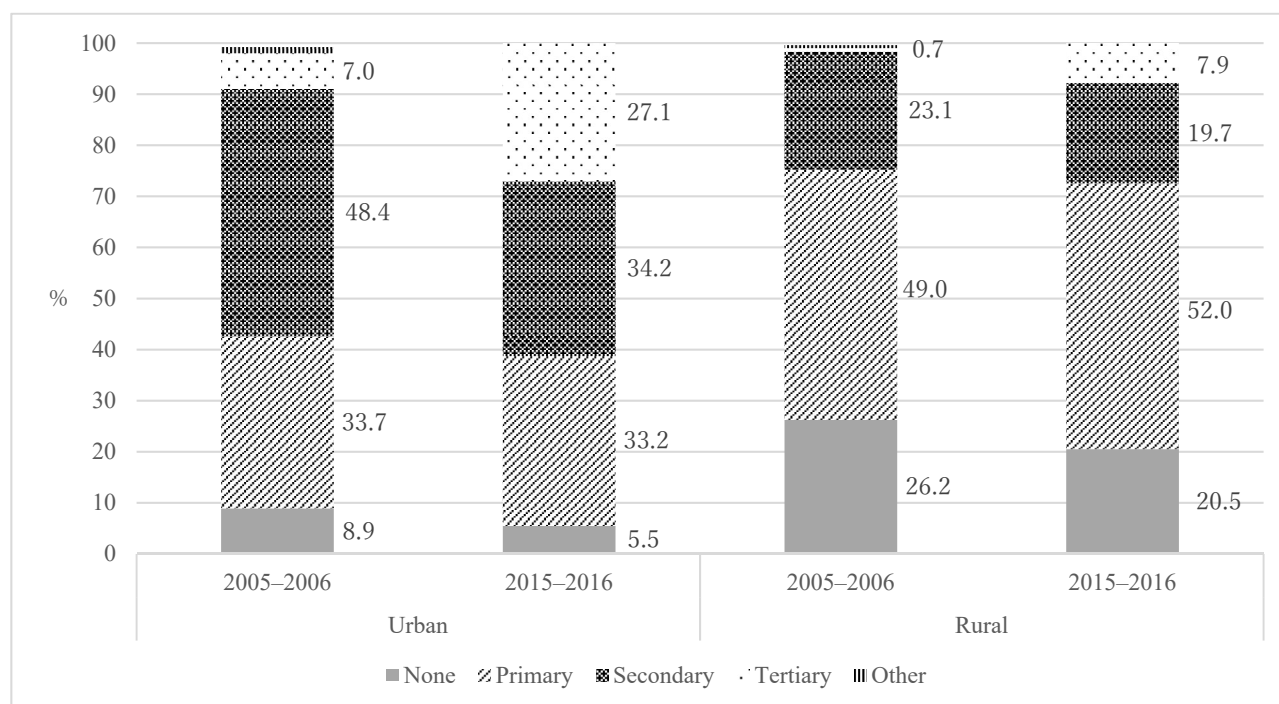


Figure 3. Percentage of population by location and the household head's education level in Kenya

Notes: Percentage of households with heads who completed university is presented for 2005–2006 data.

Source: Created by the authors based on KNBS (2007) and KNBS (2018)

The characteristics of urban households have not changed significantly in terms of the percentage of those headed by individuals with primary education. However, during 2005–2006, the percentage of households headed by those with secondary education was close to 50%, and as of 2015–2016, this percentage had decreased, while the percentage of households headed by those with tertiary education increased. Meanwhile, in rural areas, the majority of households are headed by individuals with primary education, followed by those who received secondary education, or those who are uneducated. Moreover, the percentage of households headed by individuals with tertiary education has increased from 0.7% to 7.9%, and the current surge in students pursuing their tertiary education is being observed in rural areas.

Finally, the situation in Uganda has been examined (Figure 4). Like Kenya, Ugandan data is broadly separated into urban and rural areas. In urban areas, as is the case in Kenya, there is a large percentage of individuals who received secondary and/or primary education, and as of 2016–2017, the percentage of individuals with a post-secondary education was on the rise among the population aged 15 years and above. An examination of rural data indicates that adults with primary education are found to be the most common, followed by those with secondary education, those with no formal schooling, and those with a post-secondary education. Compared to Kenya, the proportion of adults with no schooling and those with post-secondary education is slightly lower, and the gap may be considered smaller than that of Kenya.

This section has verified the current status of education universalisation and regional disparities in Thailand, Kenya, and Uganda, based on descriptive analysis. In all three countries, at least some primary education is almost universal. Meanwhile, large differences were found regarding secondary and tertiary education between Thailand and Kenya and Kenya and Uganda. Regional disparities in education were common, with large gaps evident between urban and rural areas in all three countries. Gaps were found to exist for secondary and tertiary education. Based on the current situation of education universalisation and inequality, the following section examines the national and societal vision, and the direction of educational policies and measures of the three countries.

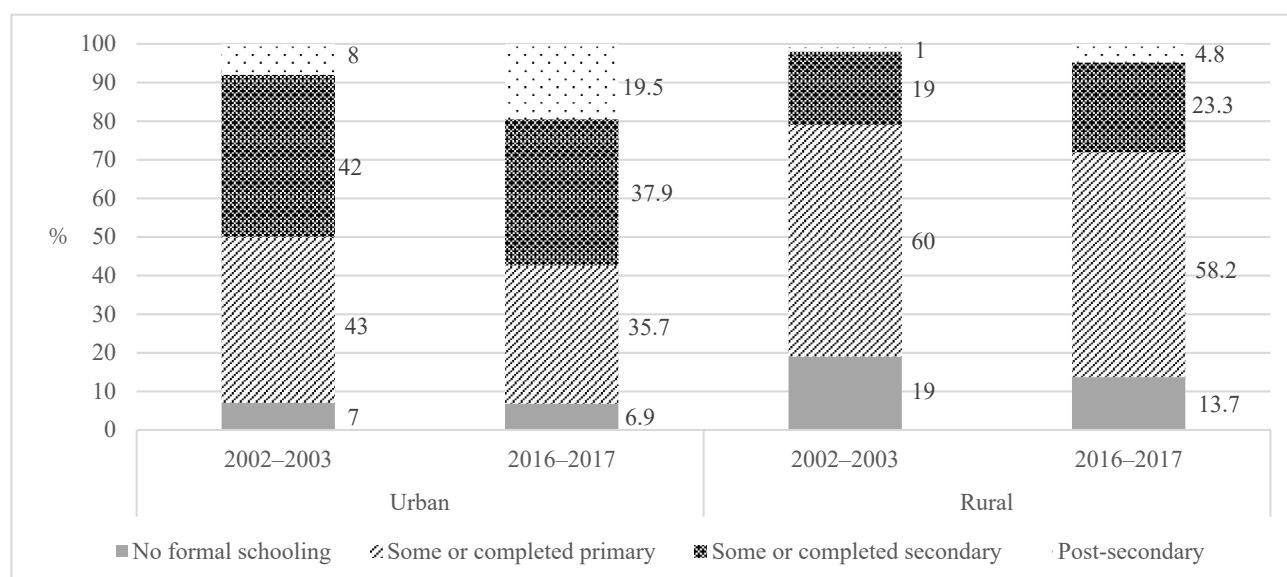


Figure 4. Percentage of the population aged 15 years and above by educational attainment and location in Uganda

Source: Created by the authors based on UBOS (2003) and UBOS (2018)

3. The national/societal image and the direction of educational policies/measures

The current section compares the following: (1) national and societal image and (2) the direction of educational policies and measures of the three countries through content analysis of related documents describing the national vision.

3.1. National and societal images of the three countries

Thailand's national vision is described in its five-year National Economic and Social Development Plan (Suehiro, 1993), which has been continuously reformulated since 1961. However, considering its ongoing political instability since 2006, the current Prayut administration formulated a 20-year, long-term plan, the 'National Strategy (2018–2037)', in 2018 (Oizumi, 2017). In Kenya, 'Vision 2030' was formulated in 2008, and in 2013, Uganda formulated 'Vision 2040'.

Thailand's 'national strategy' comprises 71 pages, Kenya's 'Vision 2030' spans 180 pages, and Uganda's 'Vision 2040' is 136 pages long; all sizeable documents with differing content. Notably, a perusal of their table of contents indicates where they detail their visions; for Thailand, it is in 'Thailand's Vision', for Kenya, it is included in the 'Executive Summary', and for Uganda, it is outlined in '1.3 The Vision'. Each of these visions has been worded to highlight the future of the respective nation across key areas such as politics, economy, and society. Table 1, created from the aforementioned documents, shows which industries are the focus for each country. Focusing on priority areas and industries is generally believed to aid comprehension of the somewhat abstract future image of middle-income countries.

The following points of significance arise upon a perusal of the comparison set out above. First, all three countries, Thailand, Kenya, and Uganda are developing ultra-long-term plans. Various domestic as well as international factors are considered relevant to the development of these plans. Examples include domestic political instability, as seen in Thailand since 2006 (Oizumi, 2017) and Kenya's references to Malaysia's 'Vision 2020' (established in 1991) (Fourie, 2014). Uganda proposed its 'Vision 2025' in 1999 and 'Vision 2035' in 2007, but both were abandoned; the current 'Vision 2040' is its first national vision (National Planning Authority, 2013, p. 3). Moreover, as was the case in Kenya, Uganda has specifically mentioned Asia, including countries such as Malaysia, Singapore, South Korea, and Thailand.

Second, an examination of Thailand's national and social image states that 'Thailand becomes a developed country with security, prosperity, and sustainability in accordance with the Sufficiency Economy Philosophy' (National Economic and Social Development Council [NESDC], 2018, p. 5). Kenya is committed to transforming itself into an 'industrialized upper middle income economy offering a high quality of life to all its citizens by 2030' (RoK, 2018b). Likewise, Uganda pledges its transformation in the future from 'a peasant to a modern and prosperous country within 30 years' (National

Planning Authority, 2013, p. 4). While Thailand is aiming to be a developed country with high-quality living standards, both Kenya and Uganda are aiming for rapid industrialisation and modernisation.

Table 1. Comparison of national documents from Thailand, Kenya, and Uganda: societal image, focus areas, and priority industries

Comparison Point	Thailand	Kenya	Uganda
Document, year of creation	National Strategy, 2018–2037, 2018	Vision 2030, 2008	Vision 2040, 2013
National and societal image	‘Thailand becomes a developed country with security, prosperity and sustainability in accordance with the Sufficiency Economy Philosophy’	‘an industrialized upper middle income economy offering a high quality of life to all its citizens by 2030’	‘a peasant to a modern and prosperous country within 30 years’
Focus area	<ol style="list-style-type: none"> 1. Well-being of Thai people and society 2. National competitiveness, economic growth, and income distribution 3. Development of human capital 4. Social equality and equity 5. Sustainability of national biodiversity, environmental quality, and natural resources 6. Government efficiency and better access to public services 	<ol style="list-style-type: none"> 1. Economic pillar 2. Social pillar 3. Political governance pillar 	<ol style="list-style-type: none"> 1. Macroeconomic strategies 2. Harnessing opportunities 3. Social transformation 4. Governance
Priority industry	<ol style="list-style-type: none"> 1. Next-generation cars 2. Smart electronics 3. Medical and health tourism 4. Agriculture and biotechnology 5. Future food products 6. Robotics industry 7. Aviation logistics 8. Biofuels and biochemistry 9. Digital industry 10. Medical hub industry 	<ol style="list-style-type: none"> 1. Tourism 2. Agriculture (livestock and fisheries) 3. Wholesale and retail trade 4. Manufacturing 5. Business process outsourcing/offshoring 6. Financial services 7. Oil and other mineral resources 	<ol style="list-style-type: none"> 1. Tourism 2. Agriculture 3. Oil and gas 4. Minerals 5. Abundant labour force 6. Industrialisation 7. Knowledge and ICT sector 8. Geographic location and trade opportunities 9. Water resources 10. Human resources 11. Transport infrastructure and service 12. Energy 13. Science, technology, engineering, and innovation 14. Urban development 15. Land 16. Peace, security, and defence

Notes: Shaded texts were added in Kenya’s second Medium Term plan 2013-2017. ICT = information and communications technology
Source: Created by the authors with reference to the aforementioned documents and Ito (2018)

Third, in terms of the order of priorities, Thailand is prioritising the happiness of Thai nationals and Thai society, followed by national competitiveness, economic growth, and income distribution, whereas the economy is the priority for both Kenya and Uganda. In addition, all three countries highlight the importance of governance, improving government efficiency, and access to public education services. This can be regarded as reflected in their rankings below the 100th

place mark on the Global Corruption Perceptions Index. For example, as of 2020, Thailand scored 36, and is placed at 104; Kenya scored 31 and is placed at 124, and Uganda scored 27 and is placed at 142 (Transparency International, 2021).

Fourth, considering crucial industry areas, in the case of Thailand, items (1) to (5) comprise primary S-curve industries (a curve showing technological development as the letter S), while items (6) to (10) are secondary S-curve industries (S-curve showing the development of the next technological system) (Oizumi, 2017). In Thailand, during the 2000s, the emphasis was on industries that utilised products characterised by their ‘Thainess’, such as cassava, sugar cane, palm oil, and cosmetics containing Thai-produced herbs, that is, industries which formed the basis of item (4), agriculture and biotechnology (Ito, 2018). Kenya is aiming for industrialisation but emphasises a range of areas, such as tourism, agriculture, wholesale and retail, manufacturing, business process outsourcing, finance, and oil and natural resources. As illustrated earlier, this is likely due to the large market share held by the primary industries such as agriculture, forestry, and fishery, despite the country aiming for industrialisation. Significantly, in Uganda, tourism and agriculture are the first items mentioned, followed by items including oil and gas, mineral resources, a young labour force, industrialisation, knowledge, and information and communications technology (ICT).

Thailand’s national vision, also known as ‘Thailand 4.0’, is depicted as an extension of agriculture (Thailand 1.0), light industry (Thailand 2.0), and heavy industry (Thailand 3.0). Considering Thailand’s trajectory, Kenya and Uganda are looking to pivot from agriculture to the light and heavy industries. They appear to be aiming to become middle-income countries. With this understanding of national vision, the following section details the educational vision and the direction of government policies and measures.

3.2. The educational vision of the three countries and the direction of their educational policies and measures

It is important to recognise that how human resource development and education are envisioned forms the basis of the realisation of the national vision work (Sawamura, 2005). Table 2 summarises the educational vision, aims and objectives, as well as the direction of policies and measures, using the same policy documents as the preceding table.

First, Thailand’s educational vision seeks 21st-century skills, Kenya’s highlights the ability to develop global competitive human resources, and Uganda’s outlines access to high-quality education and the provision of a world-class education. Second, in the case of Thailand, the direction of education policies and measures is multifaceted, including the transformation of social values and culture, the development in each lifecycle stage, and the happiness of Thai people. In contrast, Kenya is committed to providing access to education, quality of education, equity in education, science, technology, and innovation. Meanwhile, Uganda has a simple focus on human resources, education, and literacy.

The difference in terms used by each country is important, but in general, the educational vision reflects global trends such as developing 21st-century skills (Thailand), establishing global competitiveness (Kenya), and being world-class (Uganda). For example, in Thailand, the importance of scientific knowledge, methods of inquiry, technological applications, engineering-based problem solving, and the role of the teacher as a ‘learning facilitator’ or the ‘coach’ in acquiring 21st-century skills is cited. An improvement in enrolment rates for pre-primary education and the incorporation of science and technology innovation into the curriculum, the stipulation of compulsory science subjects in secondary education, the establishment of science laboratories in all secondary schools, and promotion of e-learning at technical and vocational education and training (TVET) institutes and universities are among the key features of Kenya’s policies. In Uganda, the policies are quite specific, such as inviting universities in developed countries, including the United States of America and the United Kingdom, to set up their campuses, and the expansion of educational investment in science, technology, engineering, and innovation, and research and development (R&D). Additionally, partnerships with companies such as Shell Oil, Siemens, and Microsoft are sought. Although various efforts are being made by each country, it is clear that all three countries place importance on science education. This aligns with their shared industrialisation aims.

Meanwhile, education universalisation is reflected in Kenya’s commitment to educational access and equity and Uganda’s focus on education and literacy, which are not directly related to fostering global competitiveness. In the case of Thailand, equality and equity with respect to education are indicated in a separate category of social equality and equity, as a distinct aim of the educational vision. To this end, issues of educational inequality can be considered part of social

issues such as regional inequality. While the well-established policies detailed in the educational vision cater to the upper and middle classes, they can be considered separate from the education of children experiencing hardships, that is, ‘education as welfare’ (Maki and Omori, 2020).

Table 2. Comparison of the three countries’ educational vision and direction of educational policies and measures

Comparison Point	Thailand	Kenya	Uganda
Educational Vision (aims and objectives)	<ol style="list-style-type: none"> 1. Thai people are skilled, righteous, and equipped with qualities required for the 21st century. 2. Thailand has adequate social surroundings suitable for life cycle development. 	Kenya aims to have globally competitive quality education, training, and research for sustainable development.	<ol style="list-style-type: none"> 1. Ugandans desire to have access to affordable quality health and education services. 2. Uganda will build a modern, world-class education system that provides students with a first-rate education, comparable to that offered by developed and emerging economies.
Direction of policy and measures	<ol style="list-style-type: none"> 1. Transforming social values and cultures 2. Promoting life cycle development 3. Promoting learning process reform in order to accommodate 21st-century changes 4. Realising multiple intelligences 5. Enhancing well-being among the Thai people 6. Promoting human capital development-friendly surroundings 7. Strengthening capacities in sports to generate social values and promote national development 	<ol style="list-style-type: none"> 1. Access 2. Quality 3. Equity 4. Science, technology, and innovation 	<ol style="list-style-type: none"> 1. Human resources 2. Education and literacy

Source: Created by the authors with reference to the aforementioned documents

Based on the national and educational visions outlined above, all three countries clearly aim to develop on a scale of economic growth, similar to high-income and middle-income countries. Furthermore, their direction of education policies differs. In Thailand, education is divided between education extended to the upper and middle classes, and that for children experiencing disadvantages. Uganda focuses on ensuring access to education, while Kenya emphasises remedying the lack of equity while increasing access to education. This indicates differences in the level of development of each country; Uganda needs to ensure access to education, Kenya emphasises the importance of educational equity alongside access, and Thailand aims for equity after achieving universalisation. Moreover, the emphasis on science, technology, and innovation in all three countries indicates their focus on the importance of science education. The next section discusses specific education-related initiatives that differ according to the level of education.

4. The development of educational policies and measures in the three countries

This section attempts to outline recent measures and initiatives in all three countries according to education level, using numerous materials such as policy documents, government websites, and related papers. To this end, the focus is on vocational-technology education training fields—closely related to the aforementioned secondary and tertiary education—and industrialisation. In Thailand and Kenya, certain measures have been taken considering the importance of pre-primary education (Ikemoto, 2011). Table 3 summarises the unique efforts of all three countries in the areas of

secondary education, TVET, and higher education, as outlined in various related materials.

Table 3. Comparison table of development measures in the secondary, vocational, and higher education sectors

	Thailand	Kenya	Uganda
Secondary education	<ol style="list-style-type: none"> 1. Introduction of the English Program^a 2. Establishment of the Princess Chulabhorn Science School^b 3. Creation of the Education Innovation Area^c 	<ol style="list-style-type: none"> 1. Free Day Secondary Educationⁱ 2. Secondary school bursaries^j 	Introduction of competency-based education courses for the Uganda Professional Qualification System ^u
Vocational technical education training	<ol style="list-style-type: none"> 1. Introduction of the National Institute of Technology Education Model (KOSEN)^d 2. TVET Carrier Centre^e 	<ol style="list-style-type: none"> 1. Establishment of public technical training institutions in all counties^k 2. Enhance employability of TVET graduates in partnership with industry^l 3. Construct technical vocational centres in all constituencies^m 4. Establish national polytechnics in each countyⁿ 5. Establish four new technical trainer colleges^o 6. Establish and strengthen 94 enterprise development incubators in TVCs and vocational training centres^p 	<ol style="list-style-type: none"> 1. Establishment of the Advanced Research Institute (COE)^v 2. Expansion of short-term vocational training opportunities^w
Higher education	<ol style="list-style-type: none"> 1. One Tambon One University^f 2. Thai MOOC^g 3. Future Skill & New Career Thailand^h 	<ol style="list-style-type: none"> 1. Streamlining and fast-tracking of postgraduate programmes^q 2. University loans, bursaries, and scholarships^r 3. University-Industry Linkage^s 4. Strengthening human capital development for science, technology, and engineering courses by training faculty at PhD and master's level^t 	National Research and Innovation Program ^x

Notes: COE = centre of excellence, MOCC = massive open online course, TVC = Technical Vocational Centre, TVET = technical and vocational education and training

Source: Created by the authors with reference to Sources a-x (listed in Appendix A)

First, considering the priority industry sectors outlined in the previous section, the contents of measures being developed in secondary education, TVET, and higher education are very different in Thailand, Kenya, and Uganda. In Thailand, the English program (taught by foreigners, with English as the medium of instruction), and Princess Chulabhorn Science High Schools—covering English and science education akin to Japan's super-science high schools—cater to the upper and middle classes from secondary school, and have been developed to promote the development of science, technology, and engineering human resources. Meanwhile, Kenya is providing bursaries for vulnerable groups such as girls and people residing in slums or arid and semi-arid lands (ASAL). In Uganda, educational programmes are being introduced to correspond with vocational qualifications.

Second, in the field of TVET, Thailand has transplanted the Japanese National Institute of Technology Education Model (KOSEN) through official development assistance loans, and a centre has been established to provide human resources to the Eastern Economic Corridor (with a view to develop the vital industries in the eastern region of the capital city of Bangkok). The Princess Chulabhorn Science Schools are closely linked with the KOSEN (Maki, 2020), promoting student exchange at Japan's National Institute of Technology. In contrast, both Kenya and Uganda show a clear commitment to expanding the TVET field with a view to promote industrialisation.

Third, regarding higher education, Thailand is promoting regional economic efforts such as with 'One Tambon One University', as seen in Oita Prefecture's 'One Village, One Product' movement, providing learning opportunities for future industries, such as smart agriculture, care workers, smart tourism, digital data, and future food, as well as supporting the

development of recurrent education and career progression. In Kenya, graduate school education is being emphasised to strengthen the fields of science, technology, and innovation, and improve the quality of higher education. In Uganda, the Ministry of Science, Technology and Innovation (MOSTI) has been providing intensive support for R&D in research organisations that promote the transformation of the Ugandan economy to a knowledge economy through the National Research and Innovations Program. Conversely, the Higher Education Department of the MoES, which oversees higher education, and the National Council for Higher Education (NCHE), which is the semi-autonomous government agency undertaking university accreditation, do not mention initiatives relating to the promotion of science and technology in their strategy documents¹⁾. This can be considered to have resulted from the fact that the MOSTI was newly established, as recently as 2016, and is unaligned with the MoES. Moreover, even recent higher-education-sector reviews by the EU Erasmus+ Programme, under the Accelerating Higher Education Expansion and Development project, indicate the absence of research support from the NCHE as one of the challenges faced by higher education institutions in Uganda, citing the NCHE's 'State of Higher Education Report' (Mulumba et al., 2018).

Additionally, in Kenya, an amount of 22,244 Kenyan Shillings (KES) per student is provided annually in line with the free secondary education policy; however, students attending special secondary education receive a grant of 57,974 KES annually. Moreover, additional funding and material assistance are provided to the country's six TVET institutions and three teacher training schools, thereby enabling students with disabilities to attend. Furthermore, specialised institutions, such as the Kenya Institute for the Blind and the Kenya Institute of Special Education, have been established to create educational materials for students with special needs (RoK, 2018a).

5. Development of measures to correct educational inequalities

As outlined above, while these three countries are aiming to become middle- and high-income countries focused on education universalisation, they are also facing the issue of educational inequality. Furthermore, as seen in Section 4, efforts regarding secondary and tertiary education are being undertaken in line with the national vision; however, it is necessary to first correct educational inequality, by taking measures such as improving educational access.

Therefore, this section considers this study's main theme of the future of education universalisation and inequality, discussing efforts to reduce the educational inequalities in the three countries. Various organisations are involved in correcting the education inequalities of each country. The Thai Equitable Education Fund (EEF), National Council for Nomadic Education in Kenya (NACONEK), and the Uganda Equal Opportunities Commission (EOC) are discussed as illustrative examples of this point. These details are outlined in Table 4. The Ugandan EOC differs in nature from the Kenyan NACONEK and Thailand's EEF. It is an organisation that monitors inequality correction efforts across all sectors nationwide. As such, program content unique to the EOC does not exist.

First, all three countries have established organisations to counter education inequality in the chronological order of Uganda, Kenya, and Thailand. This can be considered to reflect the socio-political situation of each country. For example, in the case of Thailand, the current Prayut administration established an EEF. In Kenya, NACONEK was established due to the opportunity presented by goal 4 of the Sustainable Development Goals—quality education for all. In Uganda, discrimination, alienation, and inequality can be traced back to the era of British colonialism. Uganda has continued facing various problems even post-independence, such as conflict, worsening safety, and poverty. The committee was established under the long-term administration of Museveni, which has continued since 1986 (EOC, 2020).

Second, an examination of each of their principles and missions indicates that Thailand is focusing on children, youth, and the general public, while Kenya is targeting nomadic people in ASAL areas. Similar to Thailand, Uganda has actively established policies to eliminate discrimination across society. It aims to equalise every opportunity in daily life and is not limited to education. For example, it covers a range of areas, gender, ICT, health, education, and agriculture. In the education sector, the focus is on all-inclusive education (EOC, 2020).

Third, Thailand's efforts are characterised by its mid- to long-term, wide-reaching programs, which comprises basic education, including pre-primary and compulsory education, school management, vocational education, and rural teacher education. In Kenya, the effort consists of ensuring access to teacher training colleges and middle-level colleges, as well as increasing bursary allocation to students attending middle-level technical colleges to enable sufficient access to tertiary education in the ASAL regions (RoK, 2013). These have been developed against the background of widening regional

inequalities, especially in secondary education and beyond. For example, a 2019 report indicates that secondary education completion rates in the ASAL regions are three times lower than that of the central areas and Nairobi, with more than seven out of ten students failing to complete secondary education. The issue has been identified as being more pronounced than primary education regional differences, given that many of those students are girls (RoK, 2019b).

Table 4. Comparison of inequality correction organisations and program descriptions

	Thailand	Kenya	Uganda
Organisation name	Equitable Education Fund (EEF) ^a	National Council for Nomadic Education in Kenya (NACONEK) ^b	Uganda Equal Opportunities Commission (EOC) ^d
Year of Establishment	2018	2015	2007
Principle	Children, young people, and all the citizens who are not financially privileged or have limited opportunities will be provided access to high-quality education and be enabled to develop according to their potential.	A well-educated population in the ASAL areas, pockets of poverty regions, and urban informal settlements proactively engaged in the transformation of Kenya.	A just and fair society where all persons have equal opportunity to participate and benefit in all spheres of political, economic, social, and cultural life.
Mission	<ol style="list-style-type: none"> 1. Assistance for the target group, investment in a knowledge base that contributes to value creation 2. Consolidation of resources through creative participation by all sectors 3. Suggestions for policy improvement 	To coordinate and strengthen the management, administration, and delivery of quality basic education to populations in the ASAL areas, pockets of poverty regions, and urban informal settlements of Kenya.	To give effect to the state's mandate to eliminate discrimination against any individual or groups of persons by taking affirmative action to redress imbalances and promote equal opportunities for all in all spheres of life.
Program description	<ol style="list-style-type: none"> 1. Provision of Conditional Cash Transfer 2. Improvement in the quality of teachers and schools 3. Development of thought, analysis, and creativity to support Thailand 4.0 4. Child Development Support Centre Model School Development 5. Rural Teacher Education Project 6. Scholarship for the development of high-level professionals 7. Provision of vocational training opportunities 8. Vocational education scholarship 9. Area-based education management 	<ol style="list-style-type: none"> 1. Establishing and operationalising the National Council on Nomadic Education in Kenya (NACONEK) 2. Improving 100 existing mobile schools 3. Equipping 600 low-cost boarding schools in 14 arid and pastoral counties 4. Constructing 15 feeder schools in each of 14 arid and pastoral counties^c 	<ol style="list-style-type: none"> 1. Usual efforts are being undertaken to enhance quality and access to the basic education stage^e 2. Payment of capitation grants to BTVET agencies^f 3. Financial assistance for non-formal BTVET programme participants 4. University entrance scholarships by district 5. Student loans 6. Scholarship payments to high-achieving high school graduates

Notes: ASAL = arid and semi-arid land. BTVET = business, technical, vocational education and training

Source: Created by the authors with reference to Sources a-f (listed in Appendix B)

As described above, Uganda's EOC differs from Thailand's EEF and Kenya's NACONEK. As a nationwide organisation that monitors the efforts of all sectors to correct inequalities, it has not developed its own programs. The usual efforts by donors and the MoES to enhance educational access and quality centred on basic education are positioned as measures to reduce educational inequality. In addition, the MoES's annual report includes measures to correct

inequality in TVET and higher education.

6. Conclusion

This section discusses the future of education universalisation and inequality in African countries aiming to become middle-income countries, summarising the discussion thus far. First, while primary education universalisation has almost been achieved across all three countries, differences were found in the higher educational stages of secondary and tertiary education between Thailand and Kenya and between Kenya and Uganda. According to regional data on educational achievement by household, gaps exist between urban and rural areas in all three countries (as described in Section 2).

The subsequent analysis of national policy documents illustrates that governments were aiming for development on a scale of economic growth, akin to that of high- and middle-income countries. Furthermore, the examination of the direction of education policies indicates that in Thailand, education is divided between education extending to the upper and middle classes and that for children experiencing disadvantage. In contrast, Kenya and Uganda are shown to be working from the bottom up in terms of improved access to education, equity, and literacy, while also placing importance on human resource development in science, technology and innovation (as elucidated in Section 3).

Moreover, as noted above, the concrete educational policies and measures developed by each country reflect its priority industries: S-curve industry in Thailand; light and heavy industries in Kenya and Uganda. However, the content of measures being developed in the fields of secondary, higher, and technical vocational education differ significantly in Thailand, Kenya, and Uganda (Section 4).

Finally, the investigation of measures to counter educational inequality indicates the priority industries of each of the three countries; however, it also illustrates that when viewed from the successes and failures of education universalisation and economic growth, the establishment of the implementing entities occurred in the chronological order of Uganda, followed by Kenya, and then Thailand. This may be due to the establishment of the respective implementation entities, but may also be seen as indicative of the differences in inequality perception; this is envisioned as inequality in Thailand, while in Kenya, the aim is to ensure educational access and equity, and in Uganda, it is viewed in terms of equity which can be promoted after ensuring basic literacy and educational access (as explained in Section 5).

Although there are differences in degree and quality among the countries being compared, they are all facing issues of stagnation and inequality. In Thailand, the idea of ‘knowing one’s place’ stems back to the social hierarchy system of the Ayutthaya period (Holmes et al., 1995), and was proactively avoided by the Thai principle of ‘philosophy of sufficiency economy’, proposed by a former king. However, recent years have seen the decline of the influence of the royal family and continued political instability. Kenya has become quite open to education opportunities. However, progression in secondary education is largely limited by academic and economic capability. Additionally, economic capability ensures progression to highly ranked schools in higher education, even in the absence of academic prowess, so the equity of the system is questionable. In Uganda, the history of dictatorship and civil war has finally given way to peace, and this experience, combined with the generous national character due to the warm climate, has acted as a buffer. However, President Museveni, who has been leading the nation for more than 35 years since 1986, has reached 77 years of age and is now facing a critical stage in his leadership of the country. From the perspective of Thailand, it will be interesting to observe whether Kenya, Uganda, and other African countries looking to become middle-income countries will continue to move forward and rise while maintaining their spirit of conviviality (Sawamura, 2020).

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Notes

- 1) There is also the issue of a mismatch between higher education and the demands of the labour market in Uganda (United Nations, 2020, p. 57). However, the major issue is that the policy for the promotion of science and technology driving Vision 2040 appears unlinked with the MoES's higher education policy (or is yet to be outlined as such). In contrast, education sectors other than higher education are seen to be oriented towards the policy for the promotion of science and technology.

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Appendix A: Sources related to Table 3

^aSource: Maki (2020)

^bSource: Maki (2020)

^cSource: Kongsanoh (2018)

^dSource: Shimoda (2020)

^eSource: Office of the Vocational Education Commission (OVEC) (n.d.) TVET Career Center. <http://tvvet.vec.go.th/>. Retrieved August 14, 2021.

^fSource: MEHESI (2020)

^gSource: Yoshimine (2020)

^hSource: MEHESI (2021)

ⁱSource: RoK (2008)

^jSource: RoK (2008)

^kSource: RoK (2013)

^lSource: RoK (2013)

^mSource: RoK (2018b)

ⁿSource: RoK (2018b)

^oSource: RoK (2018b)

^pSource: RoK (2018b)

^qSource: RoK (2008)

^rSource: RoK (2008)

^sSource: RoK (2008)

^tSource: RoK (2013)

^uSource: National Development Curriculum Centre (NDCC) (2020) *Role of the New Curriculum in Transforming Uganda to a Middle-Income Status (The Curriculum Tree 2nd issue)*. Kampala: NDCC.

^vSource: Ministry of Education and Sports (MoES) (2021) Uganda Skills Development Project (USDP). Kampala: MoES. <https://www.education.go.ug/uganda-skills-development-project-usdp/> Retrieved September 23, 2021.

^wSource: MoES (2021)

^xSource: Ministry of Science, Technology and Innovation (MOSTI) (2019) National Research and Innovation Program (NRIP) Framework. Kampala: MOSTI. <https://mosti.go.ug/sites/default/files/publication/2021/04/National%20Research%20%26%20Innovations%20Program%20Framework.pdf>

Appendix B: Sources related to Table 4

^aSource: Maki and Omori (2020). Refer to this paper for year of establishment, principal, mission, and program description.

^bSource: National Council for Nomadic Education in Kenya (NACONEK) website <https://www.naconek.go.ke/> Retrieved August 15, 2021. Refer to this website for year of establishment, principal, mission, and program description.

^cSource: RoK (2013)

^dSource: Equal Opportunities Commission (EOC) website <https://www.eoc.go.ug/> Retrieved August 15, 2021. Refer to this website for year of establishment, principal, mission, and program description.

^eSource: EOC (2020, pp. 92–94)

^fSource: Items 2 - 6 are from MoES (2020)

The Nexus Between Policy and Practice of Inclusive Education: A Study of Malawi and Ethiopia

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Abstract

The purpose of this study is to explore the *process* of addressing inclusive education policies in Malawi and Ethiopia. The study particularly focuses on children with disabilities and how the actual process intends to meet their needs. While countries in the global North have accumulated rich experiences and lessons from both special and mainstream education, countries in the global South have not. Amid the global COVID-19 pandemic and travel restriction, online semi-structured interviews were conducted with officials in charge of inclusive education in both countries' ministries of education. Findings reveal that while both countries face scarcity of human and financial resources, each of them adopts different approaches for inclusion. Whereas Malawi tends to close special schools for children with visual impairments, Ethiopia converts special schools for children with hearing impairments into regular schools. The study argues that merely introducing inclusive education without resources and teacher education may not necessarily be beneficial for all learners as they seem not to have sufficient support for quality education. The study concludes that under 'inclusive education', learners should not be left without adequate support.

Keywords: inclusive education, children with disabilities, special education, resource room/center, teacher education

1. Introduction

Children with disabilities are among the world's most vulnerable and excluded from schooling. Despite significant gains in schooling after Universal Primary Education (UPE) in sub-Saharan Africa (SSA), gaps in education outcomes between children with and without disabilities remain large and in fact, have increased over time (Wodon et al. 2018). According to a study of 11 countries in SSA, while primary completion rates of children with and without disabilities have increased over the last few decades, the gain was much larger in the latter group, resulting in growing gaps at 13 percentage points for boys and 10 for girls, and girls with disabilities remain among the lowest (ibid., pp.7–8). In terms of enrollment, the patterns observed are similar but they show that many children with disabilities face significant challenges at an early stage of schooling. While both children with and without disabilities at 12 years old have increased schooling experiences over time, the likelihood of having ever enrolled in school is 10 percentage points lower for the former group (ibid., p.9). Thus, despite large gains in primary education outcomes across SSA, it is obvious that such gains are not equally enjoyed among different groups, and children with disabilities have least benefited from UPE.

In order to tackle such disparities, the international community has agreed to eliminate inequalities and disparities. Goal 4 of the Sustainable Development Goals (SDGs) particularly focuses on inclusive and equitable quality education for all. More specifically, target 4.5 of the goal promises to eliminate gender disparities in education and ensure access to all levels of education and vocational training for the vulnerable, including persons with disabilities. In addition, 4.A of the goal, which presents the means for the actualization of the targets, indicates the building and upgrade of education facilities that are child, disability, and gender sensitive and provide safe, nonviolent, inclusive, and effective learning environments for all (UNESCO 2020). It is also stated that it is the onus of the international community to meet these goals and targets.

Inclusive education is an approach that aims to eliminate inequality and disparities in education. Although the newly globalized discourse of this term has different meanings and historical evolvments between the global North and South

(Armstrong et al. 2011) and there is no universal consensus on the definition (Winter & O’Raw 2010), countries in SSA are in the process of incorporating it in their education policies, often with much pressure from the global North. Moreover, as Armstrong et al. (2011) point out, countries in the global South are often under pressure to implement policies that are constructed as universal knowledge by the global North.

The purpose of this study is to explore the process of implementing current policies on inclusive education in two African countries—Malawi and Ethiopia. The study pays particular attention to the perspectives expressed by administrators in charge of inclusive education at the Ministry of Education (MoE). The reason for targeting administrators is because there is still an unaddressed research area; that is, how systems and population-specific approaches interact (Schuelka et al. 2019, p.xxxiv). Accordingly, we judged that with the worldwide travel restriction caused by the COVID-19 pandemic, interrogating how administrators see the process of addressing inclusive education was useful as on the one hand, they are in the position of pressure from the global North—specifically donors—to implement policies, on the other hand, they also attract pressure and criticism from teachers and parents for inadequate funding and support. Thus, this study explores the extent to which they address inclusive education.

The next section sets out the contexts of inclusive education in general and SSA in particular before moving on to the specific context of Malawi and Ethiopia. The paper then briefly explains data collection and presents the findings. The final sections discuss current challenges of implementing inclusive education before briefly concluding with areas for future research.

2. Inclusive education in sub-Saharan Africa

2.1. A brief history of inclusive education

The concept of inclusive education “did not emerge *de novo* in response to egalitarian, desegregate concerns rooted in social justice” (Schuelka et al. 2019, p.xxxi). As noted by referring to earlier studies, it is rooted in special education. Looking as far back as the 19th century, children with disabilities were seen as having a biological impairment (OECD 1999). Excluded from public education systems, it was local churches and charities that looked after their education in order to protect them from exploitation (ibid.). At the same time, one of the significant means of categorizing children was the development of IQ tests and myths related to intellectual ability (Schuelka et al. 2019, p.xxxii; Tomlinson 2019, p.18). Children with disabilities were thus placed in separate schools (Winter & O’Raw 2010). Basically, special education refers to the provision of education for children with disabilities who are separated from ordinary education systems with special materials and resources provided for them. Teachers are also trained according to types of disability and children learn based on similar categorization (Kuroda et al. 2017).

However, with the dissatisfaction of such a model and to oppose the diagnostic category, the term ‘special educational needs’ (SEN) was developed and became widely accepted in order to shift attention away from individuals to social interaction between the child and his or her environment (e.g. Wedell 1980, 1997, cited in OECD 1999, p.19). It was not until the 1970s that parental pressure in the United Kingdom, the civil rights movement in the United States, and the normalization movement in Scandinavian countries pushed forward from segregated education to integrated education (OECD 1999). From a human rights perspective, integrated education gradually took the form of a new direction for educating children with disabilities in the 1970s to 1980s (Kuroda et al. 2017).

Yet, the concept of integrated education was also subject to criticism. This is because children with disabilities were forced to fit in with ordinary school systems. “Its emphasis was on providing support to individual students to enable them to ‘fit in’ to the mainstream programme without any changes being made to that programme” (Winter & O’Raw 2010, p.12). Thus, the idea of inclusive education has evolved from these historical backgrounds.

Basically, inclusive education shifts focus from the child to the school and requires changes in school systems (OECD 1999; Alur & Timmons 2009; Winter & O’Raw 2010). UNESCO defines inclusive education as “an approach that looks into how to transform education systems and other learning environments in order to respond to the diversity of learners” (2005, p.15). It also states “inclusion is seen as a process of addressing and responding to the diversity of needs of all learners through increasing participation in learning, cultures and communities, and reducing exclusion within and from education” (ibid., p.13). Furthermore, Slee (2009, p.94) emphasizes that it is necessary to see inclusive education as “a

rallying point for the analysis of unequal and oppressive power relations” in education systems.

Apart from a conceptual understanding, it is also important to allude to international declarations and treaties. According to Ciyer (2010), the term ‘inclusive education’ became popular after the World Conference on Special Needs Education (SNE)¹⁾ which was held at Salamanca, Spain in 1994. Calling upon the previously agreed international commitment of education for all (EFA) in 1990 and the United Nations Standard Rules on the Equalization of Opportunities for Persons with Disabilities in 1993, the conference adopted *the Salamanca Statement and Framework for Action on Special Needs Education* in order to ensure equal educational opportunities for children with disabilities (UNESCO 1994). Dyson (1999) notes that the Salamanca Statement connotes both rights and ethics rationales as well as efficacy rationales as it advocates combating discrimination to build an inclusive society on one hand and emphasizes the cost-effectiveness of the approach on the other. In addition, Article 24 of *the Convention on the Rights of Persons with Disabilities (CRPD) and its Optional Protocol* adopted by the United Nations in 2006 endorses that state parties shall ensure an inclusive education system at all levels (UN 2006). In fact, the CRPD is the first international law that articulates the concept of inclusive education (USAID 2020, p.6). Together with other international treaties and declarations based on human rights²⁾, it has become the aim of the international community to address inclusive education.

Yet, one needs to be wary of the term ‘inclusive education’ and how it is contextualized in each country. Schuelka et al. (2019, p.xxxiii) caution that “inclusive education is meaningful only when embedded in understandings about community and communality; only when seen as both reflective of, and as creating, inclusion in society”. In other words, as Allan and Slee (2019, p.10) make explicit, “[d]isability is not of the individual, but is constructed through the assemblage of oppressive social relations”. Indeed, despite accumulated studies on inclusive education (Daniels & Garner 1999; Alur & Timmons 2009; Schuelka et al. 2019), there remains a research gap in terms of how education systems and structures interact with children with disabilities who have been historically oppressed and excluded by these systems and structures. In this regard, studies in the global South are still limited. Thus, it is imperative to interrogate how children with disabilities have been historically identified in education systems and what policy strategies are put in place to overcome such challenges.

2.2. Inclusive education in SSA

Historically, modern education systems in SSA were developed by former colonial governments who provided education mostly for Europeans and Asians, and a limited number of local Africans were educated to work for colonial governments (Kiyaga & Moores 2003). Just as the history of the United Kingdom shows, children with disabilities in SSA were excluded from modern education systems, and it was church organizations, missionary bodies, and local and international non-governmental organizations (NGOs) that provided education for them (Kiyaga & Moores 2003; Abosi 2007; Braun 2020).

For instance, according to Kiyaga and Moores (2003), the founder of modern education for children with hearing impairments in Africa was Andrew Foster (1927–1987), who was an African American missionary. When he travelled to Accra, Ghana in 1957, he found that there were only 12 schools for children with hearing impairments across the continent (Moore & Panara 1996, p.216, cited in Kiyaga & Moores 2003, p.20). Given the reality, he established schools for children with such impairments in Ghana and later on in Nigeria and introduced sign languages. Unlike today, communication for people with hearing impairments was limited to speaking and it was only after the introduction of sign languages by Foster that they became the language of instruction (ibid.). It seems that until recent times, sign languages were forbidden in some parts of Africa, and those who introduced them (mostly Westerners) used their own native sign languages without considering local cultures (Kiyaga & Moores 2003).

Many countries in SSA have signed, ratified, or adopted the CRPD as well as its optional protocol (USAID 2020, p.9). Countries such as the Democratic Republic of Congo, Ethiopia, Kenya, Malawi, Mozambique, South Africa, South Sudan, Uganda, and Zambia have Constitutions that include the right to education for children with disabilities (ibid.). Furthermore, many countries have educational policies and strategies that specifically target particular issues for learners with disabilities. These include physically accessible educational facilities (e.g. Ghana, Kenya, Madagascar, Nigeria, South Africa, Uganda), communication accommodations such as Braille, sign language, and audio libraries (e.g. Ghana, Kenya, Nigeria, Senegal), teacher training in special needs education (e.g. Madagascar, Nigeria, Rwanda, Tanzania, Uganda), adapting the curriculum to meet the needs of learners with disabilities (e.g. Kenya, Senegal, Uganda), and

financial assistance or tuition reduction for learners with disabilities (e.g. Malawi, Senegal) (USAID 2020, p.6). These examples indicate the fact that many countries are in the process of implementing inclusive education although the approach and means vary from country to country.

Despite such commitment, as this paper notes at the beginning, there are still a large proportion of children with disabilities who are excluded from education systems in SSA. There are several factors that exclude them. These include lack of technical teacher education, unfriendly school facilities, school locations, shortages of learning aids and materials, and discrimination in society (Franck & Joshi 2017; Ackah-Jnr & Danso 2019; Adewumi & Mosito 2019; Alemayehu 2019; Braun 2020). Particularly, many studies emphasize the lack of teacher education. This is the case for Botswana (Abosi 2007), Ethiopia (Franck & Joshi 2017; Alemayehu 2019; Tonegawa 2019), Kenya (Ohba & Malenya 2022), Tanzania (Braun 2020), and South Africa (Adewumi & Mosito 2019) to list a few. In fact, according to data produced by PASEC³), only 8.2% of grade 2 teachers and 7.6% of grade 6 teachers in 10 African countries responded that they had received some form of training for inclusive education in in-service programs (Wodon et al. 2018).

While teacher education is one of the critical dimensions for promoting inclusive education, as one study in Cambodia shows, this does not necessarily mean teachers actually implement it (Kartika & Kuroda 2019). The study found that, with the cascade training system whereby selected teachers were trained to transfer knowledge down through the system, trained teachers failed to transfer the knowledge at their own schools due partially to limited resources or support. Accordingly, the study suggests that providing schools with a post-training budget to implement the knowledge is indispensable. The same study also argues that a school environment open to the support of such implementation is crucial if it is to be actualized. Thus, unlike studies in developed countries whereby in-service teacher training has a positive attitude towards inclusion of children with disabilities (Dickens-Smith 1995; Avramidis & Norwich 2002), the study by Kartika and Kuroda (2019) cautions that the context matters for teachers in developing countries when it comes to attitude change. Since context matters for the implementation of inclusive education, we now turn to the cases of Malawi and Ethiopia.

3. Contexts of inclusive education in Malawi and Ethiopia

3.1. Malawi

Formal education in Malawi began with missionaries in 1875, but education for children with disabilities was not provided until the early 1950s whereby Scottish and South African missionaries started education for visually impaired children (Chavuta et al. 2008). Thereafter, education for children with hearing impairments was started by the Church in 1968, and education for children with learning difficulties was introduced by the government in 1996 (ibid.).

In terms of laws and policies, Section 20 of Chapter IV of the 1994 Constitution (with amendments in 2017) and the Disability Act in 2012 prohibit any form of discrimination against participation practices and the latter clearly states the importance of inclusive education (Malawi MoEST n.d., p.18). In terms of policies, the 2006 National Policy on Equalisation of Opportunities for Persons with Disabilities shows government support for inclusive education (Malawi Ministry of Persons with Disabilities and the Elderly 2006, Section 4.6). Furthermore, the national policy on special needs education in 2007 and its implementation guidelines developed in 2009 became a benchmark for a strong commitment to education for learners with disabilities (UNESCO 2021a).

According to a policy document, the government defines inclusive education as “a learning environment that provides access, accommodates, and supports all learners” (Malawi MoE 2009). The National Education Policy in 2016 states this in more detail as follows:

[It is] [p]ractice within a system of education which responds to a wide range of diversity of learners’ needs mostly arising from exclusion factors such as (but not limited to) disability, race, religion, poverty, psycho-social issues, and other difficult circumstances (Malawi MoEST 2016, p.8)

A further recent government document defines inclusive education “as a process of reforming the education system, cultures, policies and practices to address and respond to diverse needs of all learners” (Malawi MoEST n.d., p.15). The same document identifies 20 different groups of children who are most likely to be excluded from the current education

system, and disability is recognized as one of the groups. While the above indicates the political will to address education exclusion, Kawaguchi and Niwa (2020, p.66) remind us that not all initiatives are rooted in the local government, rather, donor agencies often influence and shape directions.

Basically, there are two approaches to education for learners with disabilities in Malawi. Those who have physical impairments, hearing impairments, and/or emotional and/or learning difficulties tend to learn at special schools or resource centers (RCs, also called resource rooms) within regular schools, and those who have mild disabilities such as visual and physical impairments learn in regular classrooms (UNESCO 2021a).

As of 2016, the number of learners with SEN was 120,007 in primary education, of which 57,655 (48%) were girls, and they represent 2.4% of the total enrolment in primary education (Malawi MoEST n.d., p.14). In terms of secondary education, the proportion of learners with SEN was estimated to be 1.5% (ibid., p.14). In terms of learners with disabilities, one study reveals that girls with disabilities are more likely than their male counterparts to have more years of schooling at the primary level. Yet, in all categories of disabilities, urban residents are more likely than their rural counterparts to have school experience (Kawaguchi & Niwa 2020). When disaggregated by type of disability, children with visual and hearing impairments of both sexes are more likely to be enrolled in school than those with intellectual difficulties or physical impairments (ibid.). These intersectional challenges show that children are disadvantaged not only by disabilities but also by other socioeconomic factors.

3.2. Ethiopia

Ethiopia has a unique history because despite the temporary invasion by Italy between 1936 and 1941, the country remained independent. Even before the introduction of modern education by missionaries, as far back as the fourth century CE, children with visual and physical impairments were provided with education by traditional church groups, and persons with disabilities participated in such education as learners, priests, singers, preachers, and teachers (Alemayehu 2019, p.128). However, it seems that children with other forms of disabilities or impairments were excluded (ibid.).

Modern education was initially introduced for children with visual impairments by the Church in 1925 (Ethiopia MoE 2012a) but seems to have been closed down due to the invasion by Italy. In the 1950s and 1960s schools for children with visual and hearing impairments were established by missionaries and Western NGOs (Alemayehu 2019). Because of wars and conflicts during the military regime, it was not until 1994 that the first education and training policy was produced under the current federal democratic government. Education for learners with disabilities is briefly mentioned in the document (Federal Democratic Republic Government of Ethiopia 1994). In fact, the Constitution, which was developed in 1994, does not mention free and compulsory education and there is no Education Act to date. However, Article 41 of the Constitution ensures equitable educational opportunities for all children including those with disabilities (Ethiopia MoE 2012b). The Constitution states that it is the state's obligation to provide necessary support for persons with disabilities. It is education policies and strategic papers that serve as a framework for implementation (UNESCO 2021b).

In terms of policies for learners with disabilities, the government developed the *Special Needs Education Program Strategy* in 2006 to cater for the learning needs of children with disabilities. The revised version of the *Special Needs/Inclusive Education Strategy* in 2012 critically reviewed the previous one and set up inclusive education systems in order to ensure equal access to and quality of education, which eventually led to full participation in the socio-economic development of the country (Ethiopia MoE 2012b). A recent government policy defines inclusive education as “an education system that is open to all learners, regardless of poverty, gender, ethnic background, language, disabilities and impairments” (Ethiopia MoE 2019, p.67). Teacher education is also fairly recent as it was in 2003 that teacher training colleges started courses for SNE (Alemayehu 2019).

Currently, there are two types of special school: day school and boarding school. In addition, there are special units attached to regular schools where children with moderate to severe disabilities learn. It seems that whether children with disabilities attend special schools or units differs from region to region (UNESCO 2021b). One peculiar strategy adopted by Ethiopia is the presence of the cluster system whereby all public schools are categorized as either core schools or satellite schools to form a cluster, which consists of one core school with about 3 to 35 satellite schools, depending on regions (Tonegawa 2019). One of the main purposes is to “provide support to neighboring schools and teachers to include all children, including those with special needs in their classrooms” (Ethiopia MoE 2015, p.15). This is further discussed in the findings of the present study.

In terms of pre-service teacher education, special needs educators are being prepared in 18 teacher colleges at diploma level, 12 universities at degree level, eight universities at master's level, and one university at doctoral level (UNESCO 2021b). Yet, teacher education is highly theoretical with little practical knowledge provided (Franck & Joshi 2017; Tonegawa 2019). Accordingly, some teachers and parents with learners with disabilities consider that separate education is better for them as they get attention in smaller classes by professionally trained teachers (Tonegawa 2019).

As of 2017/18, the proportion of learners with disabilities was 11% in primary and 2.8% in secondary (Ethiopia MoE 2019). In terms of types of disability in primary education, of 277,165 learners with disabilities, the highest number was partial learning difficulties at 45,576 pupils, followed by partial visual impairment at 41,244 (Ethiopia MoE 2018, p.85). There is a wide gap in enrolment of children with disabilities amongst regions, the Harari region having the highest enrolment rate at 29% compared with the Afar region being the lowest at merely 0.3% (ibid., p.85). Thus, substantial gaps exist amongst regions as well as levels of education.

4. Data collection

This study employed a case study approach as its purpose was to explore the process of implementing inclusive education from the administrative point of view in headquarters. Amidst the COVID-19 pandemic and travel restrictions worldwide, we decided to conduct online interviews via ZOOM. This approach was considered to be appropriate as participants in respective countries were familiar with the tool and previously had online interview experience. Semi-structured interviews were conducted in August 2021 with officials in charge of inclusive education at the MoE. The number of participants was one for Ethiopia and two for Malawi. Interviews were conducted separately and were recorded with the participants' permission and took around two hours for Ethiopia and one hour for Malawi. All interviews were transcribed. Due to the limited number of interviewees, findings are not generalizable; rather, they illustrate how participants try to actualize inclusive education.

5. Perspectives of addressing inclusive education

5.1. Malawi

A summary of findings for respective countries is presented in Table 1. Malawi adopts a moderate inclusion system whereby children with moderate disabilities are included in regular classes while those with severe disabilities study at special schools except for learners with visual impairments who basically study in regular classes. This is because in Malawi, people with visual impairments are not considered to be disabled (Kawaguchi & Kuroda 2013).

In terms of teacher education, there is a three-year pre-service diploma teacher education program and a one-year in-service certificate teacher education program. When students complete their respective courses, the ministry deploys them to RCs in the case of the former and they request teachers to return to their school in the case of the latter. However, it seems that pre-service teacher education does not pay much attention to inclusive education. Accordingly, many teachers who teach regular classes do not have adequate skills for meeting the needs of learners with disabilities in such classes. One interviewee responded to this issue:

Even if teachers identify a learner with a disability, how to support the learner in terms of pedagogies is a challenge for them... For example, suppose we have a learner with a hearing impairment. Most teachers do not have knowledge and skills for communicating with such learners by using a sign language or assistive device.

As in the above extract, since teacher education is limited to pre-service education targeting for SNE, regular class teachers feel they are unprepared for accommodating children with disabilities.

With regard to resource rooms, they are situated in selected regular schools and while some learners with severe disabilities study there, others study in both the resource room and regular classroom. Interestingly, while special schools provide education for learners with severe disabilities, such schools for learners with visual impairments tend to be closed down due partly to the notion of inclusive education. As mentioned above, this is because people with visual impairments are not considered to be disabled. In Malawi, based on their custom, learners with visual impairments tend to be expected to become a teacher or priest and their schooling is supported for the direction, as opposed to learners with hearing

impairments, for example, whose career paths are expected in relation to vocational training or apprenticeships (Kawaguchi & Niwa 2020). But the latter schooling is less supported.

It seems that people with visual impairments are historically in an advantageous position as compared to people with other types of disabilities. Interviewees suggested this might be the result of traditional education that was conducted orally. In contrast, children with intellectual and emotional difficulties or autism tend to be least included in school to date. In fact, one interviewee asserted that “I’ve seen those with the intellectual disability really do not get much support as compared to those with visual impairments.” Another interviewee echoed this and alluded to pre-service teacher education which tended to have programs targeting certain types of disability such as visual, hearing, or physical impairments. Accordingly, teachers have little knowledge about children with intellectual and emotional difficulties or autism and are unskilled in terms of responding to their needs. Such viewpoints seem to be reflected in employment opportunities. Both interviewees had the same opinion that historical context seems to have some influence on sociocultural outcomes.

In terms of challenges for implementing inclusive education, one interviewee emphasized limited resources for supporting learners with disabilities.

The biggest challenge is the resources that we have to use for our students at primary and secondary schools. You know, devices that support learning are quite expensive. In most cases, we do not have enough resources. For example, those learners with visual impairments may not have textbooks with Braille, and yet, schools don’t have machines to produce such textbooks. Likewise, devices for learners with hearing impairments are limited. So, I think the most challenging thing is the resources that we are supposed to prepare for learners who need them.

The above extract corresponds to another interviewee who underscored inadequate funding to fully support learners with disabilities. Thus, this seems to be a critical condition for implementing inclusive education. As both interviewees noted, schools lack basic means such as Braille textbooks, devices for learners with hearing impairments, or a friendly school environment for learners with physical impairments. They also underscored that Malawi was largely short of teaching staff and classrooms to provide quality education. Accordingly, they pointed out that regular classes were large and it was often difficult to pay attention to individual needs. By referring to such circumstances, an earlier study ironically expressed Education for All in Malawi equates to Enclosure for All (Kawaguchi & Kuroda 2013), meaning that all learners are placed in regular classrooms without adequate individual support. Interviewees also highlighted the lack of community awareness of the importance of educating learners with disabilities and the stigma associated with disabilities hamper schooling for such children.

5.2. Ethiopia

Ethiopia adopts a moderate inclusion system whereby children with moderate disabilities are included in regular classrooms while those with severe disabilities study in special schools. Currently, there is no department or directorate for disabilities at the MoE; instead, there is a team in the directorate of special support and inclusive education which covers education for disabilities and education in the emerging regions. According to the interviewee, this seems to be a challenge as decisions and/or budget allocations are limited. In addition, due to the decentralized system, decision-making and actual implementation are delegated to regional education bureaus. Accordingly, there are limitations on the MoE to exert its power. The number of people in charge of inclusive education in the regional education bureau is also small, often with dual responsibilities without experts. Consequently, the interviewee emphasized that there were variations for active implementation amongst states.

With regard to teacher education, it seems there is a lack of practical training in pre-service teacher education. The interviewee mentioned this issue as follows:

Well, when it comes to teacher education, one of the biggest problems is that it is more theoretical than practical. It is not skillful... So, they don’t have any skill in improvisation. You see, they do not prepare teaching and learning materials from locally available substances. Due to this, even the regional education bureau in charge of hiring teachers is sometimes not willing to hire these graduates.

The point raised by the interviewee was also identified in earlier studies (Franck & Joshi 2017; Tonegawa 2019). Moreover, training seems to be limited to certain types of disability (e.g. visual and hearing impairments) and less attention

is given to other types of disability such as autism.

In terms of RCs, their role is to identify children with disabilities and facilitate inclusive education by providing necessary support to teachers and learners with disabilities in regular schools. As noted in Section 3.2, according to the interviewee, core schools have RCs that support about five satellite schools. The centers are supposed to conduct teacher education, develop devices for learners with disabilities, and send itinerant teachers to satellite schools. The interviewee also clarified that one cluster had to have at least 35 children with disabilities. While this target seems quite difficult to meet, the interviewee responded that those who learned in regular schools were children with moderate disabilities. According to the interviewee, the ministry prepares for a community mobilization document before school opens. This document is passed to educational leaders in each region to be used for promoting community awareness. At the same time, school committee members visit door to door to ensure children attend school. The interviewee said this approach worked to some extent for the identification of children with disabilities to attend school. However, the interviewee also noted that the degree of commitment by teachers at RCs largely depended on the respective regional education bureaus, and the frequency and contents of activities varied.

Table 1: A summary of Inclusive Education (IE) in Malawi and Ethiopia

Contents	Malawi	Ethiopia
IE type	♦ Moderate inclusion	♦ Moderate inclusion
Teacher education	<ul style="list-style-type: none"> ♦ In-service education via a one-year course ♦ Pre-service education via a three-year course and qualified teachers are posted to RCs ♦ Lack of teacher education in IE for regular class teachers ♦ Programs lack training in various types of disability 	<ul style="list-style-type: none"> ♦ Degree holders in SNE are posted to secondary schools whereas diploma holders teach in primary schools ♦ Diploma courses are highly theoretical with little practice ♦ Lack of coordination in posting qualified teachers to relevant schools
Resource center: RC	<ul style="list-style-type: none"> ♦ RCs situated in regular schools ♦ Learners with disabilities learn in an RC ♦ Not all schools have an RC ♦ Qualified teachers are in charge of RCs ♦ Some learn in RCs while others learn in RCs and regular classes 	<ul style="list-style-type: none"> ♦ RC equipped with assistive learning materials ♦ RC staffed with teachers qualified to identify learners with disabilities and support learners with disabilities and teachers in neighboring schools ♦ About five schools share one RC (known as cluster system) ♦ Cluster has to have at least 35 children with disabilities
Regularization	♦ Special schools for children with visual impairments tend to be closed and teachers are placed in RCs	♦ Special schools for children with hearing impairment are converted to regular schools and all learners learn by sign language and mother tongue regardless of disability
Views on disability	<ul style="list-style-type: none"> ♦ Traditional education was based on oral teaching ♦ Children with visual impairments tend to participate more than those with any other types of disability ♦ Children with intellectual/emotional difficulties are least included 	<ul style="list-style-type: none"> ♦ Traditional education was based on oral teaching ♦ Children with visual impairment tend to participate more than those with any other types of disability ♦ Children with intellectual/emotional disabilities least included
Employment	♦ Learners with visual impairments have a career path as a lawyer, teacher, priest, etc.	♦ Learners with visual impairment have a career path as a lawyer, teacher, priest, social worker, etc.
Challenges	<ul style="list-style-type: none"> ♦ Lack of human and financial resources ♦ Lack of pre-and in-service teacher education in IE ♦ Lack of community/parents' awareness ♦ Lack of coordination among stakeholders 	<ul style="list-style-type: none"> ♦ Lack of trained human resources at the local level ♦ Absence of structure at all levels that coordinate SNE issues ♦ Lack of commitment by school directors and education officers at different levels ♦ Lack of community/parental awareness

Source: Online interviews in August 2021

A peculiarity in Ethiopia is that special schools for learners with hearing impairment have been converted to regular schools in order to accommodate local children. The concept was developed by the MoE. For this reason, learners with hearing impairment who used to study at a special school began to study with children without disabilities at a regular

school. Furthermore, it is worth noting that sign language has been maintained in such schools as the language of instruction since teachers are retained there. Consequently, all learners learn sign language regardless of ability.

As with the case of Malawi, Ethiopia also had traditional education before the introduction of modern education. According to the interviewee, traditional education was based on oral communication and while people with visual impairment were able to learn by visiting the homes of their local educators, people with physical impairments or other types of disability were unable to participate. Accordingly, it seems that this historical background has influenced conventional education. The interviewee explained that while learners with visual impairment may become lawyers, teachers, priests, or social workers, learners with other types of disability rarely have such opportunities.

Such views were reflected in teacher education as well. According to the interviewee, teacher education for intellectual or learning difficulties is inadequate, resulting in limited knowledge among trained teachers. Moreover, the interviewee also said that there was no follow-up system to ensure learning progress on the education ladder. This might be related to a significant gap in enrolment between the primary and secondary levels. It seems that the educational system and structure hinder the schooling of children with disabilities. Overall, the interviewee noted that challenges for inclusive education included lack of human and financial resources, inadequate practical teacher education, low community awareness, and incoordination between the MoE and regional education bureaus.

6. Discussion

This study explored the process of addressing inclusive education in Malawi and Ethiopia. Findings revealed some similarities and differences between the two countries. Similarities include insufficient human and financial resources to practically implement inclusive education. Lack of teacher education for regular class teachers is also highlighted by the interviewees under study. In addition, insufficient teaching and learning materials, support devices, and disability-friendly school environments are identified by the interviewees as hindrances to implementing inclusive education.

There are also some differences. When it comes to RCs, whereas Malawi established them within selected regular schools and some learners with disabilities are able to study there, in Ethiopia, they are placed in a core school in order to identify learners with disabilities, conduct teacher education, and send itinerant teachers to assist learners and teachers in satellite schools. Unlike the case of Malawi, learners with disabilities do not study there. While the cluster system in Ethiopia is well structured, the number of centers is insufficient, leading to wider gaps amongst regions.

Interestingly, the two countries show different patterns of an inclusive process. On the one hand, special schools for learners with visual impairment in Malawi are gradually being closed in order to accommodate such children in selected regular schools, on the other, special schools for hearing impairment in Ethiopia have been converted to regular schools to accommodate all learners. Both cases present the closure of certain types of special school in response to 'inclusive education'. Yet, the case of Ethiopia is unique as such schools have reopened as regular schools and teachers specialized in hearing impairment teach all learners by both sign language and mother tongue. This demonstrates the importance of understanding local contexts as well as the different approaches adopted by the respective countries.

Although both countries address inclusive education to some extent, we must recall that they introduced it before special education for children with disabilities became pervasive. Armstrong et al. (2011) argue that the evolvement of inclusive education is different between the global North and South. Yet, current international trends push all countries towards the same goal despite substantial differences among them. In fact, unlike countries in the global North that have rich and accumulated knowledge, experiences, or lessons from special education for children with disabilities, African countries have limited experiences of special education. Accordingly, although they have introduced inclusive education, many children with disabilities were still out of school with barely any available support. Inclusive education might mitigate governments' financial burden in SSA as they are faced with scarcity of human and financial resources and inclusive education is considered cost-efficient. However, it could actually leave vulnerable children further marginalized as schools are unable to identify excluded children with disabilities and meet their needs.

While the idea of inclusive education is understandable, we are skeptical about the extent to which individual needs, which are underscored in inclusive education, are actually and practically met by the current milieu in SSA. As explained earlier in this paper, inclusive education does not merely focus on learning together. It also emphasizes the ability to practically meet individual needs for equitable and quality education for all learners. For this reason, the hasty introduction

of inclusive education without adequate human and financial resources might result in further disparities among different groups. This does not mean that we negate the importance of inclusive education. Rather, our argument is that countries in the global South are in a position to implement inclusive education without sufficient teaching experience in education for children with disabilities.

Furthermore, it is necessary for us to reconsider conventional education systems that pay much attention to learning achievement. Highly stratified education systems constantly remind citizens of the importance of better academic performance in order to access better schools or universities and thus obtain well-paid jobs in the future. This credential system within the education structure itself reconstructs school systems that constantly marginalize people who are weak in academic performance or unable to cope with a curriculum that is highly standardized. This study, therefore, suggests the necessity to critically review the existing education system including the curriculum and teacher education that can reproduce disparities and inequalities, leaving those who are already oppressed further marginalized.

7. Conclusions

This study explored the process of addressing inclusive education for children with disabilities in two African countries—Malawi and Ethiopia. It employed a case study approach to investigate the process, with particular attention to the perspectives of administrators in charge of inclusive education. Findings reveal that the two countries have similar challenges such as a critical shortage of human and financial resources and teacher education which lead to limiting the practical implementation of inclusive education. The study also identified different approaches adopted for inclusive education. In both cases, governments are implementing inclusive education in spite of limitations. This seems important as inclusive education is a transformation of education provision based on the local context.

However, this study also found that the historical evolvement of inclusive education was totally different between the global North and the South. Accordingly, countries in SSA have introduced inclusive education owing to international consensus, pressure, and global trends. While countries in SSA have limited knowledge, experience, or lessons from education for children with disabilities, they are forced to introduce inclusive education. They also lack adequate human and financial resources. Consequently, the hasty introduction of inclusive education without resources seems not to be necessarily beneficial for all learners including children with disabilities as they do not receive sufficient support. Inclusive education is a ‘process’ not the goal, as defined by the Malawian government (Malawi MoEST n.d.) and UNESCO (2005). Thus, it is imperative to critically reflect the extent to which inclusive education actually and practically includes all learners to meet their quality education. Finally, this paper argues that the critical examination of current education systems is required since exclusions are embedded in the education system and structure.

Further study that explores viewpoints of teachers, learners, and their parents/guardians is required to examine how people on the ground are actually included in the policy formation and implementation.

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Notes

- 1) Special needs education is education designed to facilitate learning by individuals who, for a wide variety of reasons, require additional support and adaptive pedagogical methods in order to participate and meet learning objectives in an education programme (UNESCO Institute for Statistics 2012, p.83).
- 2) These include but are not limited to the Universal Declaration of Human Rights (1948), Convention against Discrimination in Education (1960), Declaration on the Rights of Mentally Retarded Persons (1971), Declaration on the Rights of Disabled Persons (1975), Declaration on the Rights of Deaf-Blind Persons (1977), African Charter on Human and Peoples’ Rights (1981), United Nations Decade of Disabled Persons (1983—1992), Convention on the Rights of the Child (1989), and African Charter on the Rights and Welfare of the Child (1990).

- 3) PASEC derives from the CONFEMEN Programme for the Analysis of Education Systems, which consists of 10 participating countries, namely, Benin, Burkina Faso, Burundi, Cameroon, Chad, Congo (Republic), Côte d'Ivoire, Niger, Senegal, and Togo.

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Exploring the Concepts of ‘(In)equality’, ‘(In)equity’, and ‘(Dis)parity’ in the National Curricula
and Examinations of Secondary Education:
A Comparison Between the Cases of South Africa, Kenya, and Madagascar

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Abstract

This paper explores the concepts of ‘(in)equality’, ‘(in)equity’, and ‘(dis)parity’ in secondary education in South Africa (SA), Kenya, and Madagascar by analysing purposively selected national curricula and examinations of secondary education. First, in the case of SA, the analysis shows that the three concepts seem to be treated from both economic and social welfare perspectives; however, globally, the focus seems to be on the economic perspective. Second, the paper argues that in Kenya, although there are descriptions of the three concepts in the sense of the distribution of resources to ensure equality of opportunities, there seems to be greater emphasis on the promotion of social equality through social welfare and mutual assistance in person. Third, the three concepts are indirectly introduced in Malagasy concepts that discuss social circumstances in the unique context of Madagascar and seek to establish a well-balanced and fair ‘living together’ in the literal as well as the figurative sense.

Keywords: National Curricula, Secondary Education Examinations, South Africa, Kenya, Madagascar

1. Introduction

This paper explores the concepts of ‘(in)equality’, ‘(in)equity’, and ‘(dis)parity’ in secondary education in South Africa (SA), Kenya, and Madagascar by analysing purposively selected national curricula and examinations for the certificate of secondary education in each country. According to Sawamura (2020, p.1), it is essential to consider the concepts of ‘equality’, ‘equity’, and ‘disparity’, especially when considering the difficulties of defining them in the Japanese language context. Furthermore, Sawamura criticises the tendency that in African countries, increasing the quantity of education – which is ‘visually easy to recognise’ – has been the top priority, while improving the quality of education has received less attention (ibid., p.2). In addition, Ogawa et al. (2020, p.15) state that when discussing concepts such as ‘equality’ and ‘disparity’ in education, it is crucial to consider the ‘unique social contexts’ of the studied society, and when discussing the ‘universalisation of education’ in ‘developing countries’, it is vital to consider the concept of ‘equity’, which is being defined by various social contexts and the individual’s position.

The above-mentioned studies imply that it is important to analyse the actual social phenomenon when exploring the concepts of (in)equality, (in)equity, and (dis)parity in the discussion of the ‘universalisation of education’ in African countries. To do so, this paper focuses on the cases of SA, Kenya, and Madagascar, countries that are located in the south, east, and about 400 km off the east coast of mainland Africa. In addition, the paper discusses the characteristics of the above-mentioned three concepts from the social context of each country and explores whether the perspectives of each country are towards global societies, continental (African) societies, and/or domestic societies.

2. Analysis of the case of SA

2.1. Introduction to the case of SA

In SA, an ongoing process of redressing the legacy of apartheid – inequality, inequity, and disparity – has been one of the main targets since the country's first democratic election in 1994. In the process, educational reform has been one of the key challenges, and national curricula have been introduced and revised several times (cf. Sakaguchi 2021). In this section, the case of SA regarding how the concepts of (in)equality, (in)equity, and (dis)parity are taught/learned and evaluated is explored by focusing on the national curricula and the national examinations (hereafter, 'curricula' and 'examinations' in this section) of the upper secondary phase.

In the upper secondary phase (Grade 10 to Grade 12) in SA, two official languages¹⁾, Mathematics or Mathematical Literacy and Life Orientation (Group A) are compulsory (DoBE 2011, p.28). In addition, learners in the phase must take 'a minimum of any three subjects' (ibid., p.29) from the listed subjects (Group B). In this paper, English Home Language (HL) and Life Orientation are selected from Group A, and Business Studies, Economics, Geography and History are chosen from Group B since they can be said to be suitable and appropriate subjects when analysing and discussing the above-mentioned three concepts in SA's context.

In this paper, the curricula introduced in 2011 by the Department of Basic Education (DoBE) of SA called the *Curriculum and Assessment Policy Statement Grades 10-12* (CAPS) of 1. Business Studies, 2. Economics, 3. English HL, 4. Geography, 5. History and 6. Life Orientation are analysed²⁾. In addition, past examinations including memoranda of the six subjects conducted in the final year of secondary education called the *National Senior Certificate Grade 12* (NSC) (for Life Orientation, *NSC Common Assessment Task* (CAT)), which the authors collected from the websites of DoBE and/or the Western Cape Education Department (WCED), are analysed³⁾. Specifically, in this paper, the examinations conducted in 2014, 2015, and 2016 in SA are analysed (see Table 1)⁴⁾. The year 2014 was the first year in which CAPS started to be fully implemented; therefore, the examinations (NSC/NSC CAT) analysed in this paper represent the first three years of the complete implementation of the curricula and examinations.

Table 1. List of SA's examinations and memoranda (2014-2016) (by DoBE) analysed

Year	Examinations and memoranda analysed
2014	<ul style="list-style-type: none"> ■ NSC [November] of ... 1. Business Studies; 2. Economics P1, P2; 3. English HL P1, P2, P3; 4. Geography P1, P1 Annexure, P2; 5. History P1, P1 Addendum, P2, P2 Addendum – all with the Memoranda ■ NSC CAT [September] of ... 6. Life Orientation – with the Memorandum
2015	<ul style="list-style-type: none"> ■ NSC [November] of ... 1. Business Studies; 2. Economics P1, P2; 3. English HL P1, P2, P3; 4. Geography P1, P1 Annexure, P2; 5. History P1, P1 Addendum, P2, P2 Addendum – all with the Memoranda ■ NSC CAT [September] of ... 6. Life Orientation – with the Memorandum
2016	<ul style="list-style-type: none"> ■ NSC [November] of ... 1. Business Studies; 2. Economics P1, P2; 3. English HL P1, P2, P3; 4. Geography P1, P1 Annexure, P2; 5. History P1, P1 Addendum, P2, P2 Addendum – all with the Memoranda ■ NSC CAT [September] of ... 6. Life Orientation – with the Memorandum

Source: All the documents of NSC/NSC CAT including the memoranda in Table 1 were collected from the websites of DoBE and/or WCED (see note 3)

2.2. Findings from the analysis⁵⁾ of the case of SA

2.2.1. Findings from the analysis of the curricula

The analysis of SA's curricula (CAPS) of the six subjects showed that the concept of (in)equality appeared in all six subjects as a common principle of the curricula (see Table 2 for the overall results). Specifically, they appear in the section 'The National Curriculum Statement Grades R-12 is based on the following principles' (e.g. CAPS Business Studies, p.4): '[the curriculum statement] is sensitive to issues of diversity such as poverty, inequality, race, gender, language, age, disability and other factors' (e.g. ibid., p.5)⁶⁾ and 'ensuring [...] that equal educational opportunities are provided for all sections of the population' (e.g. ibid., pp.4-5). Based on these texts, it can be said that the concept of (in)equality is set at the core of the curricula of SA.

Second, it was found that the concept of (in)equality appeared, for example, ‘Inequality and poverty – definitions and impacts’ (ibid., p.16); ‘Human Rights as defined in the Constitution (issues of equality, respect and dignity including other economic, social and cultural rights)’ (ibid., p.33); ‘The reconstruction of the South African economy after 1994 as an effort to redress the inequalities of the past’ (CAPS Economics, p.22); ‘income inequality’ (ibid., p.22); ‘creating awareness and sensitivity to inequality in the world’ (CAPS Geography, p.8); ‘a sense of fairness, sustainability and equality’ (ibid., p.9); ‘Overview of the progress, if any, that was made towards equality and civil rights by the civil rights and Black Power movements’ (CAPS History, p.28); ‘challenges of poverty and gross inequality’ (ibid., p.31); ‘unequal access to basic resources’ (CAPS Life Orientation, p.14); and ‘Addressing unequal power relations and power inequality between gender’ (ibid., p.20). From these texts, it can be suggested that the characteristics of the concept of (in)equality in the curricula can be explained as the concepts that described the notions such as ‘poverty’, ‘human rights’, ‘economy’, ‘income’, ‘civil rights’, ‘access to basic resources’, and ‘gender’.

Third, it was revealed that the concept of equity appeared (the term ‘inequity’ does not appear in the documents analysed), for example, as follows: ‘Employment Equity Act’ (CAPS Business Studies, p.9); ‘The impact of recent legislation, developed in response to demands for redress and equity, on small and large business operations’ (ibid., p.33); ‘Employment Equity’ (CAPS Economics, p.22); and ‘Principles of equity and redress’ (CAPS Life Orientation, p.23). The findings suggest that the concept of equity in the curricula is related to notions such as the ‘Employment Equity Act’ (EEA) and ‘business’. Fourth, it was found that the concept of (dis)parity did not appear in any of the curricula of the six subjects.

Table 2. The overall findings from SA’s curricula (CAPS) (2011)

	(in)equality	(in)equity	(dis)parity
Common for all	3	0	0
1. Business Studies	5	10	0
2. Economics	3	2	0
3. English HL	0	0	0
4. Geography	3	0	0
5. History	7	0	0
6. Life Orientation	7	2	0

Source: Created by the authors based on the curricula of each subject (2011)

2.2.2. Findings from the analysis of the examinations

From the analysis of SA’s examinations (NSC/NSC CAT) including memoranda of the six subjects (see Table 3 for the overall findings), first, it was found that the concept of (in)equality appeared, for example, as follows; ‘The coefficient that measures the inequality of income’ (NSC Economics P1 2015, p.5), ‘Some African Americans challenged these segregatory policies in terms of the Supreme Court ruling in the Brown versus Board of Education case of 1954, which argued that ‘separate educational facilities are inherently unequal’ (NSC History P1 2015, p.10), and ‘the Commission for Gender Equality’ (NSC CAT Life Orientation 2016, p.3). In addition, in the memoranda, the concept appears, for example, as follows: ‘Introduce affirmative action by ensuring that male/female employees are remunerated fairly/equally’ (NSC Business Studies 2016 Memorandum, p.19); ‘It provide[s] all South Africans with equal opportunities to participate fairly in the South African economy’ (NSC Economics P2 Memorandum 2015, p.4); ‘Human Rights – all people irrespective of their race, gender or religion are expected to be treated fairly/with equality’ (NSC History P1 Memorandum 2014, p.15); ‘The economic inequalities between north and south still persist’ (NSC History P2 Memorandum 2014, p.17); and ‘Provide equal opportunities for boys and girls in programmes’ (NSC CAT Life Orientation Memorandum 2016, p.7). The analysis indicates that the concept of (in)equality is related with the notions such as ‘income’, ‘economy’, ‘education’, ‘gender’, and ‘human rights’.

Second, it was found out that the concept of equity appeared (the term ‘inequity’ does not appear in the documents analysed), for example, as follows: ‘Suggest practical ways in which businesses may comply with the Employment Equity

Act’ (NSC Business Studies 2016, p.8); ‘The job advertisement, the company’s equity process and company policies and procedures’ (NSC CAT Life Orientation 2014, p.3); and ‘Propose THREE guidelines that the recruitment committee should consider when dealing with the principles of equity in the workplace, regarding applicants with disabilities’ (NSC CAT Life Orientation 2015, p.6). In addition, the concept appears in the memoranda, for example, as follows: ‘abuse of dominant positions and mergers to achieve equity and efficiency in the South African economy’ (NSC Economics P2 Memorandum 2014, p.17) and ‘Gender equity changes people’s treatment of, men and women ensuring that gender is a neutral factor when accessing resources, rights, and opportunities in society’ (NSC CAT Life Orientation Memorandum 2016, p.8). These texts suggest that the concept of equity is connected with the notions such as EEA, ‘workplace’, ‘disabilities’, ‘economy’, ‘gender’, ‘society’ and ‘rights’.

Third, the concept of (dis)parity appeared in English HL (2016), for example, as follows: ‘Discuss how the disparity mentioned in this paragraph affects the youth’ (NSC English HL P1 2016, p.5). The concept also appeared in History (2015) as one of the sources in the addendum that describes the quotations of an economist (NSC History P2 Addendum 2015, p.12). Furthermore, the concept appeared in the memoranda as follows: ‘Bring about gender parity’ (NSC Geography P1 Memorandum 2014, p.18) and ‘correct gender disparity in football’ (NSC CAT Life Orientation Memorandum 2016, p.6). The findings suggest that the concept of (dis)parity is related to notions such as ‘gender’ and the economic situations of certain groups of people.

Table 3. The overall findings from SA’s examinations and memoranda (2014-2016)

Year	Subjects	Examinations			Memoranda		
		(in)equality	(in)equity	(dis)parity	(in)equality	(in)equity	(dis)parity
2014	1. Business Studies	0	1	0	10	0	0
	2. Economics	0	0	0	5	9	0
	3. English HL	3	0	0	11	0	0
	4. Geography	0	0	0	0	0	1
	5. History	4	0	0	15	0	0
	6. Life Orientation	0	1	0	1	0	0
2015	1. Business Studies	0	2	0	9	5	0
	2. Economics	1	1	0	4	3	0
	3. English HL	0	0	0	2	0	0
	4. Geography	0	0	0	0	1	0
	5. History	1	0	1	2	0	0
	6. Life Orientation	0	2	0	0	2	0
2016	1. Business Studies	0	2	0	7	7	0
	2. Economics	1	0	0	3	3	0
	3. English HL	1	0	2	7	0	0
	4. Geography	0	0	0	0	0	0
	5. History	0	0	0	3	0	0
	6. Life Orientation	2	1	0	2	8	1

Source: Created by the authors based on the examinations and memoranda of each subject (2014-2016)

2.3. Discussion on the case of SA

From the findings of the case of SA, it can be concluded that the three concepts are employed from both social welfare (e.g. ‘human right’) and economic (e.g. ‘income’) perspectives, yet as a whole, the latter perspective seems to appear more frequently. What can be drawn from this interpretation of the analysis results? First, it is important to mention that in the preamble of EEA – the law that is brought up in the several subjects analysed in this paper –, it is stated that the act recognises that:

as a result of apartheid and other discriminatory laws and practices, there are disparities in employment, occupation and income within the national labour market; and that those disparities create such pronounced

disadvantages for certain categories of people that they cannot be redressed simply by repealing discriminatory laws, (Government Gazette 1998, p.2)

thus, it aims to 'promote the constitutional right of equality and the exercise of true democracy', 'ensure the implementation of employment equity to redress the effects of discrimination', etc. (ibid., p.2). As can be seen from these descriptions, all the three concepts explored in this paper appear in EEA, which indicates that there is a focus on employment – in other words, the economic conditions of people are emphasised – also to solve issues regarding social welfare. Second, in addition, it is pointed that in SA, 'the fight against poverty, disease and inequality should never become "charity"' (Du Toit ed. 2003, p.220). From this statement and the descriptions in EEA together with the findings of this paper, as a whole, it can be concluded that the main focus of learning/teaching in the evaluation of the three concepts in the six subjects of SA's secondary education seems to be on improving economic conditions of people rather than promoting 'charity' (social welfare) – although it does not mean that the latter is not valued; in fact, economy/business seems to be expected to promote redressing the legacy of apartheid.

3. Analysis of the case of Kenya

3.1. Findings from the analysis of the curricula

Kenya is currently in a period of transition, with the new curriculum being introduced and the old curriculum coexisting. The old curricula (1984, 1992, 1995, 2002) consisted of eight years of primary education, four years of secondary education, and four years of higher education, known as the 8-4-4 system, which was established in 1984. It was revised in 1992, 1995, and 2002. The new curriculum, established in 2017, is based on two years of pre-primary education, six years of primary education, three years of lower secondary education, and three years of senior secondary education. As of the academic year 2021, the new curriculum is reflected up to the sixth grade of primary school. For this reason, the Kenya Certificate of Secondary Education (KCSE) examinations from 2017 to 2019, which are the subjects of this analysis, are based on the old curriculum. The new curriculum opens with a page of criticism of the old curriculum. The main criticism is that the old curriculum was academic and examination-oriented, had curriculum overload, lacked adequate opportunities to learn practical skills, and did not contribute to accelerating economic growth in Kenya (Republic of Kenya [RoK] 2017).

How then do the three concepts appear? In the first edition of the old curriculum in 1984, there is only one place where the words (in)equity and (in)equality appear, and that is as part of the curriculum rationale, under the heading 'Equitable Distribution of Education Resources'; 'The 8-4-4 system will ensure that there are equal opportunities for all students regardless of their place of origin, creed, or race by providing equitable distribution of educational resources' (RoK 1984, p.155).

It was not possible to obtain a copy of the old curriculum, which was revised in 2002, but a reference to the syllabus that follows that curriculum shows that the fifth of the eight national goals of education is to 'promote social equality and responsibility'. It says: 'Education should promote social equality and foster a sense of social responsibility within an education system which provides equal educational opportunities for all. It should give all children varied and challenging opportunities for collective activities and corporate social service irrespective of gender, ability, or geographical environment' (RoK 2002, p.vii).

3.2. Findings from the analysis of the examinations

3.2.1. Overview

The KCSE examination was implemented in 1989. For the purposes of this section, examinations for the latest three years 2017-2019 in the three subjects of History and Government (HIS), Christian Religious Education (CRE), and Business Studies (B/S) are used for analysis. There are 30 subjects in the KCSE examinations as of 2019, but only 11 of these can be taught in most schools and are generally written by students in the examination. These 11 subjects are chosen by at least a quarter of all candidates.

The number of candidates for each of the three years is approximately 600,000 to 700,000 (Table 4). For example, in 2019, out of the approximately 700,000 candidates who took the examination, there were more than 600,000 in Chemistry and Biology, in addition to the three compulsory subjects of English, Mathematics, and Swahili. However, in these

subjects, the three concepts do not appear in a way that has a social meaning. For this reason, although the number of examinees is rather small, this study focuses on three subjects (HIS, CRE, and B/S), in relation to the three concepts. Of these three subjects, CRE and HIS have the sixth- and seventh-largest number of candidates (approximately 550,000 for CRE and 480,000 for HIS; Table 5). Many schools offer B/S as an elective with the practical subject of Agriculture (290,000 students), and 280,000 students took it in 2019 (Table 5).

Table 4. Candidates (*number of sat, 000s)

Year	Male	Female	Total
2017	315.6	296.3	612.0
2018	338.6	321.6	660.2
2019	355.8	341.4	697.2

Source: Kenya National Examination Council [KNEC] (2019, 2020)

Table 5. Candidate by Subject (*number of sat, 000s)

	2017			2018			2019		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
HIS	217.8	203.5	421.3	235.6	222.8	458.4	247.7	236.1	483.8
CRE	213.1	260.9	473.9	230.8	284.9	515.7	244.2	301.6	545.9
B/S	136.8	133.9	270.8	137.3	138.7	276.1	140.3	143.8	284.1

Source: KNEC (2019, 2020)

KCSE is mostly a descriptive examination. Many questions have more than one correct answer, and candidates are expected to provide the number of multiple answers specified in the question paper. This analysis deals with a set of question texts and answer books, mainly referring to examples of multiple answers (KNEC 2018, 2019, 2020). They are in the KCSE Examination Report, published annually by the Kenya National Examination Council, which contains question papers and marking schemes.

3.2.2. The appearance of the concepts of (in)equity, (in)equality and (dis)parity

First, in the analysis, the frequency of the three concepts in the three subjects over three years was checked, including the variants of the three concepts (e.g. equitable, equal). The results of the analysis showed that the concept of (in)equity appeared four times and (in)equality four times in HIS, (in)equality twice in CRE and (in)equity twice, (in)equality once, and (dis)parity three times in B/S (Table 6).

The trend across the three years and three subjects was for (in)equity to be used in combination with the word ‘distribution (or share)’, and (in)equality to be associated with the words ‘for all (or everyone)’. For example, the word ‘distribution’ or ‘sharing’ accompanied the word ‘(in)equity’ in five of the six times it appeared. Specifically, in the question that asked students to write a ‘characteristic of a good tax system’, ‘Equitably distribution the tax [*tax] burden according to the payer’s ability to pay’ was one of the model answers (B/S, 2019, p.127).

Table 6. The appearance of the three concepts in KCSE examinations (2017-2019)

	Year	(in)equity	(in)equality	(dis)parity
HIS	2017	2	1	0
	2018	2	1	0
	2019	0	2	0
CRE	2017	0	0	0
	2018	0	1	0
	2019	0	1	0
B/S	2017	0	0	1
	2018	1	1	0
	2019	1	0	2

Source: Created by the authors based on the examinations of each subject (2017-2019)

In (in)equality, four of the seven appearances are linked to ‘all’ or ‘everyone’, such as ‘equality for all’. For example, in the question about ‘the factors which were responsible for the growth of African nationalism in South Africa’, ‘The spread of Christianity which preached equality for all people thereby arousing Africans consciousness about their position in the society’ was found in the model answer (HIS in 2017)⁷⁾.

The concept of (dis)parity appeared in all of them as the word ‘disparity’, and in all of them, it was used in connection with ‘income’. In two of them, it was associated with ‘distribution’ as was (in)equity. For example, the answer to the question about a ‘feature that may indicate a country’s state of underdevelopment’ included ‘high disparity in income distribution’ (B/S in 2019, p.125).

3.2.3. Topics addressing economic differences

The topics addressing economic differences were dealt with extensively in all the three subjects compared to other topics related to the three concepts (Table 7).

Table 7. Themes that dealt with the three concepts in KCSE examinations (2017-2019)

	Economic differences	Ethnicity	Gender	Race	Religion	Disability	Region
HIS	20	5	1	4	2	0	0
CRE	24	4	7	1	1	1	0
B/S	8	0	0	0	0	0	1

Source: Created by the authors based on the examinations of each subject (2017-2019)

For example, in the HIS where ‘African Socialism’ is studied, three concepts can be read from its ideology. Regarding the topic of African Socialism, for example, in the HIS in 2019, there is a question ‘Discuss five features of African Socialism which was [*were] adopted in Kenya after independence’. The answer includes: It emphasized equal job opportunities for all regardless of one’s tribe/religion/background’, and ‘Narrowing the gap between the rich and the poor would be achieved through progressive taxation/mutual assistance’ (p.61).

As a related topic, tax/distribution appeared in many cases in HIS and B/S. For example, in B/S, it often appeared in the context of questions about knowledge of the advantages/disadvantages and characteristics of tax systems, but the answers to these questions were also related to the three concepts. For example, the answer to the question on the benefits of indirect taxes in 2018 includes ‘it promoted equality/paid by everyone who purchases the goods’. On the other hand, in 2019, the answer to the question about the ‘characteristic of a good tax system’ is ‘Equitably distribution of the tax [*tax] burden according to the payer’s ability to pay’ (p.127). Comparing the two questions gives a glimpse of the distinction between the terms (in)equality and (in)equity with respect to tax systems.

Questions dealing with ‘poverty’ and the ‘gap between the wealthy and the poor’ as problems to be solved were particularly prevalent in HIS, and the importance of helping the needy and the criticism of greed were overwhelmingly asked in CRE. In HIS, economic differences were addressed, for example, in the question about ‘Ways in which poverty undermines national unity in Kenya’ (in 2017), with the answer: ‘It divides people on the basis of their economic status’. In CRE, for example, a question in 2018 asked about the ‘Similarities between traditional African view of evil and Biblical concept of sin’ and one of the answers included ‘greed’ (p.433). Conversely, questions were also asked about generosity and sharing with others as important values both from the perspective of God’s teachings in Christianity and from the perspective of African communities.

3.3. Discussion on the case of Kenya

First, (in)equality and equity were also important concepts in the education system itself. In Kenya, education is one of the main concerns of the people and is, therefore, highly political. The old curriculum was formulated when the first president, Jomo Kenyatta, was replaced by President Daniel arap Moi, who had a different ethnic background from that of Kenyatta. During Kenyatta’s time, education was heavily expanded in his home region, which was also why President

Moi introduced a quota system for education in Kenya (Amutabi 2003). With this in mind, the statement, ‘The 8-4-4 system will ensure that there are equal opportunities for all students regardless of their place of origin, creed, or race by providing equitable distribution of educational resources’ (RoK 1984, p.155) in the old curriculum tells us how inequality in education was seen as a problem at that time, although the word ‘ethnic’ was not explicitly used. It is also representative that many questions related to ethnicity have been included in recent KCSE examinations.

Kenya also has a strong image of a capitalistic economy. A previous study also notes that Kenya, contrary to its neighbours Tanzania and Uganda, which followed the socialist development model symbolised by the late President Nyerere’s ‘Ujamaa’ model, has adhered to capitalism in practice, despite the term ‘African socialism’ in its development strategy policy documents (Oketch & Rolleston 2007). However, as far as the KCSE examinations are concerned, African socialism is strongly emphasised. The analysis of the three concepts in KCSE also shows that there is little that endorses liberal competition, but rather a positive view of the redistribution of goods through the tax system and the correction of economic disparities through personal sharing, and a considerable endorsement of social welfare. While the focus of this view of welfare is on helping those who are below a certain level (especially in CRE, where helping and sharing with needy people is emphasised as an endorsement), there is also much content that focuses on the issue of difference itself. The criticism of greed is a typical example.

The old Kenyan curriculum is said to be academic and examination-oriented, and most of the questions are answered by rote memorisation (although there are some questions in B/S that require specific tasks such as calculations, which were not cited in this paper). However, such knowledge, which can be memorised, includes not only objective facts but also values, and many of the three concepts analysed in this paper were no exception.

4. Analysis of the case of Madagascar

4.1. Introduction to the case of Madagascar

This section explores the concepts of (in)equality, (in)equity, and (dis)parity in the national curriculum and examinations for the certificate of secondary education in Madagascar, a large country with wide socio-cultural and ethnic diversity. First, the historical and social backgrounds regarding disparity are presented. Second, the national curriculum used in upper secondary school from 1998 to 2020 is analysed alongside the examinations for the Baccalaureate Certificate from 2014 to 2017. Finally, the concepts of (in)equity, (in)equality, and (dis)parity in the local context of Madagascar are discussed.

The Malagasy education system comprises five years of primary school, four years of lower secondary school, and three years of upper secondary school where students in the *classe de terminal* (3rd year) in the general education must sit for the baccalaureate examination to complete secondary school. The examination includes six compulsory school subjects for all the existing three tracks A, C, and D (literary, semi-scientific, scientific), namely Malagasy, French, History-Geography, Mathematics, Philosophy, and Physical Education, with other optional subjects (Physics-Chemistry, Natural Sciences, and a Modern Language such as English or German).

4.2. Social and historical background regarding disparity in Madagascar

An overview of the social and historical background of Madagascar is essential for understanding and discussing (in)equality, (in)equity, and (dis)parity in the country. Historically, different groups of migrants from Southeast Asia, Southern Africa, and Arabia came to settle in different parts of Madagascar, bringing their own socio-cultural practices, while the indigenous people already had their own. Despite their geographic location and the diversity of the population, the Malagasy language was developed and spoken all over the island (Ratsimaholy n.d.). In Malagasy, society (*fiarahamonina*) literally means ‘living together’, and among the common values of the *fiarahamonina* are the *fihavanana* (brotherhood), *fifanajana* (mutual respect), and *firaisankina* (solidarity) (ibid.). These values were shared among the different *foko* (a group of people of the same origin and ancestors living in a defined territory) during what is known as the *Fahagola* period (ibid.).

The *foko* grew into kingdoms during the Kinship period, and the Merina kingdom in the central highlands, currently the capital of Madagascar, was among the most powerful ones. Different casts were formed, the royal family (*andriana*),

the freemen (*hova*), and the slaves (*andevo*) (ibid.). The hegemony of the Merina kingdom contributes to a social disparity between different groups. As the Merina opened up to Western civilisation, the British religious missionaries developed schools in their dominion, creating an educational and economic disparity between the central highlands and the coasts (Isnard 1962). The arrival of French colonisers who defeated the Merina kingdom and settled in the former Merina territory facilitated the rapid development of the central highlands and widened the already existing economic and educational disparity between people in the central part and those along the coasts, as high schools and top French schools were only found in the highlands (ibid.). In addition, the racial policy adopted by the colonists to destroy the already 'fragile' unity of the Malagasy people (Allen & Covell 2005) largely contributed to expanding the gap and increasing the tensions between social and regional groups.

Today, in the post-colonial era, the educational and economic disparities between regions since the period of monarchy prevails and is even increasing due to different social and territorial divisions (Razafindrakoto et al. 2017). 'The fundamentally statutory and hierarchical social structuring that has persisted since the period of kingship is aggravated by numerous social cleavages (distinctions within groups of the same statutory origin and obvious interpersonal mistrust) and territorial cleavages (city/countryside, unequal development of the territories, isolation of some of them, dominance of the capital)' (ibid., p.230, translated from French by the authors). Subsequent governments have tried to restore national unity (Repoblikan'i Madagasikara 1994) and made efforts to address educational disparities through legal texts and education policy reforms (Ministère de l'éducation nationale 2012; MEN et al. 2016, 2017). For instance, the second article of the law on the general orientation of the education system and training in Madagascar (Repoblikan'i Madagasikara 1994) in 1994 highlights the role of education in preserving the cultural, linguistic, and spiritual heritage of the community, and in providing the members of Malagasy society with a sense of responsibility and the capacity to safeguard national sovereignty and cohesion. In the laws on education in 2004 and 2008 (Repoblikan'i Madagasikara 2004, 2008), Article 3 stresses the role of education in fostering values such as *aina* (life), *fanahy maha-olona* (spirit/attitude makes the person), *hasina* (virtue), and *fiavianana* (brotherhood), which are part of the common heritage of the Malagasy *fiarahamonina*.

4.3. Analysis of the three concepts in the national curriculum and examinations

In describing the general aims of education, the upper secondary school curriculum used from 1998 to 2020 (Ministère de l'éducation nationale 1998, pp.4-5, translated from French by the authors) states that 'education provided in Malagasy secondary schools must above all, aim to train an autonomous and responsible type of individual, imbued with the cultural and spiritual values of his or her country, particularly the "*fiavianana*, guarantor of national unity" [...] to promote and protect the national cultural heritage'. This aim is founded on the constitution stating that sovereign Malagasy people are

convinced of the necessity for the Malagasy society to find its originality, its authenticity and its 'Malagasyness', and to be registered in the modernity of the millennium while preserving its traditional values and fundamental principles based on the *fanahy malagasy* (Malagasy spirit) [...] and privileging a framework of life allowing a 'living together' without distinction of the region, origin, ethnicity, religion, political opinion, or gender [...] to preserve national unity in the implementation policy for a balanced and harmonious development (République de Madagascar 2010, pp.1-2, translated from French by the authors).

The concepts of (in)equality, (in)equity and (dis)parity are mainly found in three school subjects, History, Geography, and Malagasy; however, while the first two subjects teach general world knowledge, the Malagasy subject introduces 'the Malagasy and the way he/she thinks about his/her world' (Ministère de l'éducation nationale 1998, p.11, translated from Malagasy by the authors), and provides a more contextual view of the three concepts in Madagascar. Therefore, our analysis focuses on the Malagasy school subject in the national curriculum and examinations. The subject comprises two parts, namely literature and *riba* which we define as 'Malagasy philosophy' in this article. Due to access limitations, this study analyses national examinations for Track A, the track that receives the highest number of candidates from public schools every year. Table 8 shows the number of candidates from public schools who underwent national examinations from 2014 to 2016.

There is no clear translation of (in)equality, (in)equity, and (dis)parity in the Malagasy language and no direct mention of these concepts in the curriculum; however, our analysis shows that they are addressed in Malagasy concepts (see Table

9) that are believed to regulate people's lives in society. Table 10 shows the occurrence of the three concepts in the national examinations, where (in)equity and (in)equality were seen almost every year and (dis)parity only appeared once. Related themes (see Table 11) highlight the importance of morality, humanness, 'Malagasy', which are values of the *fiarahamonina*, and encourage the candidates to be critical of certain Malagasy beliefs.

Table 8. Candidates from public schools by track

Year	Track A		Track C		Track D	
	Registered	Passed	Registered	Passed	Registered	Passed
2014	32,926	12,512	2,714	1,263	14,499	6,601
2015	37,055	14,049	2,553	1,110	14,727	4,148
2016	40,540	19,361	15,845	7,348	2,770	1,199

Source: Malagasy Ministry of Education website (October 2021)

Table 9. The three concepts in the Malagasy subject in the national curriculum

Malagasy concept	Closest translation	(in)equity	(in)equality	(dis)parity
Ny marina	The true	✓	✓	✓
Ny rariny	The fair	✓	×	×
Ny hitsiny	The just	×	✓	✓
Ny fanahy	The conscience	✓	✓	✓
Ny tsiny	The blame	✓	✓	×
Ny tody	The karma	✓	✓	×
Ny anjara	The fate	×	✓	✓
Ny lahatra	The destiny	×	✓	✓
Ny vintana	The fortune	×	✓	✓

Source: Created by the authors based on the curriculum (1998)

Marina, *rariny*, and *hitsiny* may be the closest to the three concepts. There is only one *marina*, and people should always strive to find it. It suggests an idea of parity and equality of all before the truth and allows one to make a judgement on what is fair and equitable (*rariny*). *Hitsiny* is what is right and just, usually from a legal perspective. *Tsiny* and *tody* are similar to curses and/or karma, suggesting that people are equally judged according to their actions and deserve the results of their deeds. *Fanahy* differentiates a person from other living creatures; it is the conscience and the discernment of good or bad, right or wrong. *Anjara*, *lahatra*, and *vintana* are invisible forces that shape people's lives in either a good or bad way, suggesting to a certain extent that some forms of (in)equalities and (dis)parities that are seen in society could be caused by forces beyond the control of the individuals.

Table 10. The three concepts in the Malagasy school subject in the national examinations' questions and answers

Year	(in)equity	(in)equality	(dis)parity
2014	✓	✓	×
2015	✓	×	✓
2016	×	✓	×
2017	✓	✓	×

Source: Created by the authors based on Track A examinations (2014-2017)

Table 11. Main themes dealing with the three concepts in the Malagasy school subject in the national examinations

Year	Humanness & morality	Malagasyness & society	Beliefs & critical thinking
2014	4	6	6
2015	1	9	4
2016	18	11	0
2017	8	6	7

Note: Words belonging to the lexical field of each theme in each exam paper were counted.

Source: Created by the authors based on Track A examinations (2014-2017)

4.4. Discussion on the case of Madagascar

A series of social and historical events has resulted in the gradual loss of unity and values that were once common to all Malagasy people who managed to harmoniously live together amid diversity. Legal texts, education plans, and the national curriculum try to decrease the existing disparities and restore common identity by fostering values highlighted in Malagasy philosophy. As such, the three concepts are presented in a subtle manner in the national curriculum and examinations in an attempt to raise young people’s awareness of the uniqueness and originality of ‘the Malagasy’ both in doing and in thinking. In this regard, society as a whole seems to be at the centre of the discussions during the consecutive examinations, suggesting a rather socialist approach to education when looking at the Malagasy school subject alone.

The themes (see Table 11) reflect, for instance, that Malagasy morality talks about the three concepts in the sense that humans naturally have a conscience and sense of discernment of what is right and just based on the truth, but such morals are fading, which calls for the need to foster ‘Malagasyness’ and the (lost) values of the *fiarahamonina*. They particularly promote fairness and justice, and it is believed that people (will) always bear the consequences of their deeds. On the other hand, thought-provoking discussions about certain beliefs are also held to encourage deeper reflections on the reasons for one’s misery/fortune, and not to be content with the thinking that one has no control over his/her own course of life.

It seems that the three concepts are used to explain the existing forms of injustice in society and address such issues by establishing a mindset that seeks harmonious coexistence. In this respect, it can be said that they are discussed from the perspective where education is targeting the development of a well-balanced society founded on domestic values, among which the *fihavanana*, a concept ‘situated between an ideal harmony and the current human integration’ (Raison-Jourde 2014, p.13, translated from French by the authors). It is believed to play an important role ‘in the practice of mutual aid [and solidarity] based on the family model in the communities’ (Raison-Jourde 2014, p.10, translated from French by the authors) and it represents a form of social welfare initiated by community members themselves to assist the disadvantaged members of society. Proverbs, which are an unavoidable part of the national examinations, well-illustrate such values (e.g. ‘A house in the north and one in the south, we take shelter in the one that does not leak’; ‘When guinea fowls go in flocks, the dog cannot catch any of them’) as well as worldviews related to the three concepts, such as, ‘Those who persecute the weak will be persecuted by the strong’ and ‘What is equitable is very thin and hard to find’ and always comes with the yearning for the truth.

5. Conclusion

Considering the above-mentioned findings of the analysis, the following points can be discussed from the social contexts of SA, Kenya, and Madagascar as the characteristics of the concepts (in)equality, (in)equity, and (dis)parity. First, when exploring the case of SA, as shown above, the three concepts seem to be learnt/taught and evaluated from both social welfare and economic perspectives, although the focus seems to be on the latter. To further understand the characteristics of SA, it may be useful to refer to the following discussions. Abedian points out that ‘South Africa has one of the most unequal distributions of income in the world, measured in terms of the global index of income inequality’ (Abedian 2003, p.80) and describes it as a society ‘where disparities of income are the highest by global standards’ (ibid.). Similarly, it is stated that ‘South Africans – for better or worse – are experiencing a widening gulf between the haves and have-nots, also as a result of globalisation’ (Du Toit ed. 2003, p.70). Considering these discussions and the findings of this paper, it can be argued that in SA, global and economic perspectives seem to be valued when considering the development of the

county. In fact, it can be pointed out that in the case of SA, the following examples may be related to such discussions: ‘Inequality is increasing in the world’ / ‘Inequality is increasing within countries’ / ‘Inequality is increasing between rich and poor countries’ (NSC History P2 Memorandum 2014, p.17). From the above, it can be assumed that the focus on economic/business perspectives in SA’s upper secondary education may be connected with the notion of globalisation and high expectations of fulfilling the standards of the global society. In other words, the three concepts in the context of SA’s secondary education need to be understood, as the concepts outlook not only domestic (SA) or continental (Africa) but also global societies; thus, they seem to be used in a more economic or competitive sense.

Second, it can be seen from the Kenyan curriculum that (in)equity and (in)equality are mainly used in the sense of the distribution of educational resources, that is, ensuring the equality of opportunities, while promoting social equality is also emphasised as the purpose of education. For the KCSE examinations, too, there was much emphasis on opportunity points (e.g. distribution of resources), but also much description of consequences. They were used both in the sense of redistribution throughout the country, such as the tax system and in the sense of moral values that are attached to everyday life practices. Another feature of Kenya is that there are more examination questions related to ‘Africa’, as represented by ‘African socialism’, than in South Africa or Madagascar. There were some questions that asked about regions other than Africa in the HIS, but there were more questions about African countries. For example, the issue of discrimination was often used in the context of contrasting Westerners and Africans (HIS, 2018). Kenya’s KCSE examinations seemed to emphasise the fact that Kenya is a member of Africa; in other words, it focuses on societies in the African continent.

Third, the concepts of (in)equality, (in)equity, and (dis)parity in the Malagasy context seen in this study are very much oriented towards the domestic goals of establishing a good ‘living together’ among the people in the country. Shared heritage, including Malagasy language and philosophy, represents an important educational approach to address the issue of social and regional disparities and bring about social unity by promoting the values common of the *fiarahamonina*. The Malagasy school subject encourages young people to reflect on existing forms of (in)equalities, (in)equities, and (dis)parities in society from the lenses of philosophical concepts that are believed to make up the originality of Malagasy people. This study shows that the three concepts are strongly present in the Malagasy curriculum and examinations since the idea of fairness and justice is one of the cornerstones for building a harmonious society from the perspective of Malagasy philosophy. However, the use of these three concepts is not only limited to discussing social circumstances in the unique context of Madagascar but also suggests a way to think about the world, a mindset that seeks to establish a fair ‘living together’ in the literal and figurative sense. It is worth mentioning that unlike in SA and Kenya, English is not the language of instruction in Madagascar, and the three concepts were drawn from the authors’ interpretation, which may differ from that of the two other countries.

Finally, it is crucial to note some limitations of this study and the issues that need to be explored in the future. First, it is important to mention that the curricula and examinations analysed in this study were purposively selected by mainly focusing on the subjects that the authors thought were related to the concepts of (in)equality, (in)equity, and (dis)parity; therefore, the characteristics of each country described in this paper need to be understood as one of the aspects – in other words, the results do not show all the characteristics of each country. Second, from the conclusion of this paper, future studies should carefully consider ways to address the three concepts in African education studies. This is because even with the three countries (SA, Kenya, and Madagascar) explored in this paper, the three concepts seem to be diverse depending on the focus of each country (global, continental, and/or domestic).

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Notes

- 1) There are 11 official languages in Group A, and “Home Language” and “First Additional Language” are set as subjects for each language (DoBE 2018, p.54).

- 2) The CAPS documents were collected from the DoBE website ([https://www.education.gov.za/Curriculum/CurriculumAssessmentPolicyStatements\(CAPS\)/CAPSFET.aspx](https://www.education.gov.za/Curriculum/CurriculumAssessmentPolicyStatements(CAPS)/CAPSFET.aspx), accessed on 4 September 2021).
- 3) The NSC/NSC CAT documents, including the memoranda of each subject, are collected from the following websites of DoBE ([https://www.education.gov.za/Curriculum/NationalSeniorCertificate\(NSC\)Examinations/NSCPastExaminationpapers.aspx](https://www.education.gov.za/Curriculum/NationalSeniorCertificate(NSC)Examinations/NSCPastExaminationpapers.aspx), accessed on 4 September 2021) and/or WCED (<https://wcedportal.co.za/past-papers>, accessed on 4 September 2021).
- 4) The number of national examinations written and achieved between 2014 and 2016 is shown in the table below.

	2014		2015		2016	
	Written	Achieved	Written	Achieved	Written	Achieved
Business Studies	207,659	77.9%	247,822	75.7%	234,894	73.7%
Economics	137,478	68.9%	165,642	68.2%	155,908	65.3%
English HL	105,480	95.1%	111,785	93.8%	107,967	94.1%
Geography	236,051	81.3%	303,985	77.0%	302,600	76.5%
History	115,686	86.3%	154,398	84.0%	157,594	84.0%
Life Orientation	542,956	99.6%	660,202	99.7%	663,975	99.7%

Source: The data were collected from DoBE (2018, pp.59, 62)

- 5) To analyse the documents (pdf files) of the national curricula and examinations, the three concepts are explored using the search tool of Adobe Acrobat Pro (2017), except when the documents cannot be searched. In that case, the documents are analysed by the authors. In counting the three concepts as shown in Tables 2 and 3, the contents that did not seem to be directly related to the three concepts targeted in this study were not counted (e.g. the ‘concept of map projections: equal area and true direction projections’ (CAPS Geography 2011, p.16), etc.).
- 6) In this paper, when quoting sentence(s) from the national curricula and examinations, the underlining and square brackets [] were added by the authors ([...] indicates omissions).
- 7) In the Kenyan section, page numbers are not shown when they are unclear.

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A Critical Review of the Literature on Low-Fee Private Schools: Whose Reality Counts?

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Abstract

The purpose of this paper is to critically review research and discussion on low-fee private schools in the last 20 years and to identify research gaps as well as the direction of the debate. By reviewing the literature, the authors found that studies are still largely limited to South Asia and some commonwealth countries in sub-Saharan Africa and are concentrated on the analysis of wealth and gender in terms of equity. The review also identified that some studies conducted on this theme tend to value findings that are based on rigorous and empirical research, neglecting studies that explore detailed explanations, processes, and voices on the ground in the global South. Moreover, the overall discussion concentrates on dichotomous ideologies, neoliberal market versus welfare state ideologies instead of how to respond to the needs and issues of unregulated and unregistered schools and children out of school. This study, therefore, suggests that solutions need to be found for the running of low-fee private schools since most of them operate and manage outside their present education systems with little support from local governments. Yet, it is these schools that often meet the needs of the poor and vulnerable with scarce human and financial resources.

Keywords: low-fee private school, critical literature review, neoliberalism, transnational network

1. Global expansion of the low-fee private school and its background

The last 20 years have seen significant growth of Low-Fee Private Schools (LFPS) in the so-called global South, particularly in sub-Saharan Africa and South Asia. It is reported that the phenomenal growth of LFPS has initially been driven by privatization by default (Verger et al. 2016, p.23). In other words, rather than explicit government promotion of a market-oriented policy in education, private actors spontaneously have responded to the need created by the critical shortage of government provision (Srivastava 2008; Oketch et al. 2010; Stern & Smith 2016; Verger et al. 2016; Edwards et al. 2017; Lange 2021).

Recently, however, LFPS have moved from being considered merely de facto privatization to a substantial part of a 'strategy of design' by the international development community (Srivastava 2010 in Verger et al. 2016, p.103). Indeed, various international actors, including aid agencies, development banks, philanthropists and edu-business, have increasingly supported these schools (Srivastava 2016; Lange 2021). Moreover, as will be discussed later, several governments of the global South such as Pakistan, Uganda and Liberia, have made formal arrangements in public-private partnership (PPP) with LFPS for their education expansion and improvement (Verger et al. 2016). Accordingly, the growth of LFPS has attracted significant attention both from policymakers and scholars alike, resulting in a heated debate about their desirability for education quality, equity, and efficiency (e.g. Tooley & Dixon 2005; Srivastava 2013; Heyneman & Stern 2014; Srivastava 2016; Verger et al. 2016).

According to Härmä (2021), the debate on LFPS has shifted twice. Starting in the 1990s and early 2000s, initial discussion was about doubts around LFPS and where they were located. By the late 2000s, the discussion had shifted to whether the poor were actually accessing LFPS and if such schools offered quality education. Since the late 2010s, the debate has revolved around what to do with LFPS and "whether or not they should be actively promoted as proving at least a partial solution to education challenges" (ibid., p.4). Thus, recent attention is focused on how to include or place LFPS in the existing education system.

However, much research and discussion to date seems to be based on the global North predominantly using Western theories and concepts. Relatively little effort has been made to understand the complex phenomenon of LFPS either through the viewpoint of the people studied or by using social theories developed in the global South. Thus, the purpose of this paper is to critically review research and discussion on LFPS in the last 20 years and to identify research gaps as well as the direction of the debate. The following section sets out the nature and diversity of LFPS before moving on to Section 3 on the debates around the desirability of LFPS. Section 4 discusses findings from critical reviews, followed by Section 5 for conclusions and further research.

2. The nature and the diversity of LFPS

It is important to clarify the nature and diversity of the LFPS we are focusing on. LFPS are defined as non-elite private schools that serve the poor and marginalized and are ‘affordable’ for such families (Phillipson 2008m, cited in Verger et al. 2016, p.89). However, the existing literature on LFPS does not necessarily differentiate types of private school, creating confusion as to what type of private schools they refer to when debating their desirability. For instance, a study by Alcott and Rose (2016) does not necessarily differentiate types of private school when comparing learning outcomes.

The boundary between private and public is neither as distinct as the definition indicates. Basically, private schools are understood to be “schools that are owned and managed independently of government, usually under government regulations, and that charge user fees” (Tooley 2017, p.228). While this conventional definition is widely accepted, as this paper argues, demarcations of finance and regulations between public and private schools are often ambiguous. For example, in South Africa, not-for-profit independent schools serving poor communities with low- to middle-level fees can receive a conditional state subsidy (CDE 2015). Similarly, in Pakistan, some private schools receive government funds through vouchers (Amjad & MacLeod 2014). In Liberia, the government in collaboration with national and/or international agencies has delegated the management of 93 public primary and pre-primary schools to eight private organisations including the prominent for-profit school chain Bridge International Academies¹ in order to improve the quality of public schools (Dixson & Humble 2019). This will be further discussed in Section 3.5. These cases show the relationship between the state and market vary from one country to another and is highly context-specific.

While the case of Liberia is unique, many LFPS are owned and managed by community groups, religious organisations, charitable trusts, educational entrepreneurs, non-governmental organisations (NGOs), philanthropists, and individual proprietors without government regulations (Tooley et al. 2008; Amjad & MacLeod 2014). Teachers may also establish a school in order to help local residents (CDE 2015). Whereas a limited number of LFPS seem to be registered and recognised by the government, most of them are not and the literature includes both cases when studying LFPS (e.g. Tooley & Dixson 2005; Härmä 2019). With the nature and differences of private schools and studies including diverse private schools in mind, the next section explores debates around the desirability of LFPS

3. Debates around the desirability of LFPS

3.1. Equity and access

Whether the poor can actually access LFPS has been subject to contested debate for many years. Those who support LFPS emphasize that they reach the poor (Tooley & Dixson 2005, 2006; Dixson 2012; Heyneman & Stern 2014; Tooley & Yngstrom 2014; Tooley 2017). For instance, Tooley and Dixson (2006) compare fees in recognized and unrecognized private school in India, Ghana and Nigeria and find that the latter type of private school has lower fees than the former. Another study in Lagos in Nigeria shows that 73% of children in government schools and 69% of children in LFPS live in households on or below the poverty line (Tooley & Yngstrom 2014, p.14). However, others counterargue that private schools are not accessible by the poorest (Lewin 2007; Härmä 2011; Akaguri 2014; Alcott & Rose 2016).

Whether LFPS are accessible by the poor often depends on how one interprets findings. For instance, Härmä (2011) found that although parents preferred private schools to poor quality government schools, only 41% of children in her sample of very poor villages in India attended private school. In contrast, referring to this finding, Tooley (2017, p.233) interprets this as “two out of five children going to private school in very poor, remote villages in one of India’s poorest states is evidence indicating the affordability of private education.” As the above shows an example of interpretation,

accessibility by poor and marginalized children often depends on how findings are interpreted. While some may argue that LFPS are accessible by the poor as long as children from a low socio-economic background are included, others may consider this is not sufficient and a majority of the poor need to be considered for accessibility. This is one aspect of difficulties in concluding that LFPS are accessible by the poor and marginalized.

There is yet another dimension to be considered, that is, how the poor manage to send children to LFPS and at what cost. A study conducted in the poorest rural areas of Ghana shows that when the poorest manage to send and keep their children in LFPS, this is achieved only by acquiring loans and gifts from relatives and accumulating debt (Akaguri 2014). Another study in Zambia also indicates that parents have to meet financial trade-offs between basic needs such as food and health and education for their children (Edwards Jr. et al. 2019). These findings raise concern around the meaning of ‘accessible’ LFPS.

Overall, a rigorous review of the literature conducted by Day Ashley and Wales (2015) concludes that evidence is weak for the assumption that the poor and poorest are able to pay private school fees; that private schools geographically reach the poor; and that private schools are equally accessed by boys and girls. In the latter case, studies show that girls are less likely than boys to be enrolled in private schools although findings are context-specific (Day Ashley & Wales 2015; Rose 2015; Aslam 2017). When it comes to philanthropic and religious private schools²), evidence is strong that they geographically reach the poor and marginalized although whether they are equally accessed by boys and girls shows only moderate evidence (Day Ashley & Wales 2015). However, by referring to the context of Bangladesh, Heyneman and Stern (2014) emphasize that private education effectively tackles the issue of gender inequality. These findings indicate that LFPS are not necessarily universally accessible and equitable for the poor and marginalized but rather it is highly context-specific.

3.2. Quality and accountability

There is a relatively large body of literature that examines the relationship between types of school and learning outcomes. Those who support LFPS argue that although they charge fees, the amount is much lower than that required by their elite private counterparts and learners in the former outperform learners in public schools (Tooley et al. 2010; Dixon et al. 2013). According to a rigorous review of the literature, many studies indicate moderate-strength evidence that learners attending private school tend to perform better than their public counterparts (Day Ashley et al. 2014). An updated version of the review includes philanthropic and religious private schools and concludes that the former attain better learning outcomes, but the finding is less clear about the latter type when compared with public schools (Day Ashley & Wales 2015). Another literature review concludes that LFPS have slightly better learning outcomes than public schools (Aslam 2017). A more recent study also found that learners in private schools did not do worse than their public counterparts (Aslam & Kingdon 2021). Thus, there seems to be a relatively unanimous conclusion that private schools perform better than public ones.

However, such relative higher performance may be lost when considering pupils’ socio-economic backgrounds (Alcott & Rose 2016). Moreover, as Alcott and Rose (2016, p.505) argue, while private schooling improves a child’s chance of learning the basics of reading and writing, it does not narrow the gap in learning inequalities among household wealth, thus raising serious concern about the legitimacy of the findings (ibid.). A rigorous review by Day Ashley et al. (2014) also points out the variation in the relative performance of private school pupils in different subject areas. Furthermore, they caution that most studies do not adequately take into account learners’ socio-economic background (ibid.). In fact, the meaning of ‘better’ needs attention as “many children in developing countries are not achieving basic competencies across all school types; as such ‘better’ does not necessarily mean ‘adequate’ or ‘good’” (Day Ashley & Wales 2015, p.5).

In terms of quality teaching and learning environment such as teachers’ attendance, class size and facilities, early studies argue that teachers’ attendance and commitment are far better in LFPS than their public counterparts (e.g. Tooley et al. 2008; Dixon 2012; Tooley & Yngstrom 2014). These and other studies claim that LFPS have more teaching and learning materials and maintain better school infrastructure than public schools (Tooley 2009). A rigorous review shows that there is strong evidence of better teaching in private and philanthropic schools although the meaning ‘better’ varies from more teacher presence to teaching activity and approaches, to pedagogy and structure in philanthropic schools (Day Ashley & Wales 2015).

Just as the previous sub-section raises a critical concern about the meaning of ‘accessible’ LFPS, a review of the

literature on quality also notes that there is a need for attention to the meaning of ‘better’ quality of education. Furthermore, as UNESCO (2004, p.36) presents the complex and interdependent factors that influence education quality, learning achievement is just one aspect of the many outcomes that examines quality education. Teacher presence, teaching time, or teaching and learning materials are also some enabling inputs contributing to quality education, but they are mostly visible measurement factors. There are other visible and invisible factors contributing to quality education and the latter is quite important but much more difficult to investigate. Thus, it is also necessary to critically review the existing literature in order to interrogate whether the quality factors that have been under discussion sufficiently cover numerous factors. Tikly (2014, p.3) argues the notion of education quality is “far from being neutral, ‘technical’ issues”, and “competing conceptions are linked at a deeper level to alternative ontological positions”. Yet, the existing scholarship on LFPS tends to use the notion of quality of education rather unproblematically.

3.3. Parents’ views and school choice

How parents view private schools in contrast to public schools is critical. A study conducted in Ghana, Kenya, Tanzania and Pakistan shows that parents perceive private schools to be of higher quality than public schools because the latter represent poor national examination scores, over-crowded classrooms, higher teacher absenteeism and unengaged teachers (Heyneman & Stern 2014). Another study in Nigeria shows that across all income bands, private schools are favoured over public schools on all quality criteria, and the only reason parents choose public schools is affordability (Tooley & Yngstrom 2014). Shakeel and Wolf (2019, p.143) claim that “poor parents are active choosers and willingly participate in choice programmes.” However, a rigorous review concludes that evidence is weak as to whether parents have access to information or knowledge of schools and teachers (Day Ashley & Wales 2015). In fact, a study of learner school mobility in informal settlements of Kenya found that parents ‘perceive’ that private schools offer a better quality of education (Oketch et al. 2010). Many studies identify that the view expressed by parents that private schools offer better quality education is only a ‘perception’ and often lack sufficient information for comparison (Oketch et al. 2010; Akaguri 2014). Some scholars argue that parents’ (mis)perceptions are often shaped by active branding by private providers (Edwards et al. 2017; Riep 2017).

Apart from the quality aspect, parents often choose private schools for a particular reason. For example, a study in Bangladesh shows that English as the medium of instruction attracts parents because a growing number of companies run trade internationally which predominantly uses English for communication (Mousumi & Kusakabe 2017). Thus, the early introduction of English in private schools or schools that use English as the medium of instruction attract parents. Another reason for preferring private to public schools is that the former provide free meals. Studies show that free lunch programs often persuade parents to choose LFPS as public schools collect lunch fees under so-called free primary education (Oketch et al. 2010; Ohba 2013). There are also some LFPS that provide free uniforms for learners. Some schools provide a tuition exemption (full or half) system for economically vulnerable households, such as single-parent families or families registering more than three children at school (Ohara 2014). Religious motivation is another important aspect when it comes to preference for private to public schools (Heyneman & Stern 2014; Mousumi & Kusakabe 2019). A rigorous review of the literature indicates that there is moderate evidence of religious motivation being an important factor in school choice (Day Ashley & Wales 2015). While some scholars point out that parents tend to prefer LFPS for social status reasons (Joshi 2014, 2019), other scholars also show that some parents choose these schools simply because “they are close to their home” or “there are no government schools nearby” (e.g. Ohara 2014; Mousumi & Kusakabe 2017). Sometimes LFPS are located in densely populated areas like slums, or unauthorised colonies where many domestic migrant workers reside. In these areas, the provision of government schools is insufficient (Ohara 2014). Thus, parents choose private schools because the former meet their specific needs in their respective contexts, which they judge their public counterparts are unable to offer.

3.4. Cost-effectiveness and sustainability

A rigorous review of the literature found that there is moderate evidence that private and philanthropic schools have a lower cost of education delivery compared with public schools and this is often supported by lower teacher salaries (Day Ashley & Wales 2015). An early study found that the average salary for a teacher in a public school is three or four times

higher than that of a teacher in an unrecognized or unregistered private school (Tooley & Dixon 2005). A study in Mozambique, where all schools are registered, shows a similar finding that the average monthly salary of teachers in public schools was three times higher than that of those in private schools, and the lowest monthly private school salary was a quarter of that of its public counterpart (Härmä 2016).

In terms of sustainability, Tooley (2017) clearly states that LFPS are financially sustainable. As he points out, one proxy for sustainability is the length of time a school has been operational. However, there is no clear benchmark for the length of time that shows the school is sustainable. Thus, according to his research, it seems just seven years mean sustainable. Some research also points out that 'low-cost' is not 'low' for most parents and delays in payment are frequent (Ohara 2014). What is clear through the overall literature review on this theme, however, is that private schools that operate for the poor and marginalized often maintain lower costs than their government counterparts by paying teachers poor salaries and offering only short-term contracts despite their extensive work and duties.

3.5. Emergence of LFPS transnational network

Although the majority of LFPS are owned and managed by local individuals or community groups in the shadow of the formal education system, the emergence of LFPS has drawn the attention of individuals and organizations across the globe. These include edupreneurs, NGOs, edu-businesses, investors, aid agencies, who support neoliberal ideologies. A British researcher, Tooley played a key role in creating the global awareness of LFPS by linking these individuals and organizations through shaping and spreading the ideas of 'cost-effectiveness', 'school choice' and 'privatization' for the education of the poor (Nambissan & Ball 2010). Studies show a variety of approaches provided by those supporters of LFPS such as policy advocacy, technical support, including teacher training, curriculum development, pedagogy and school performance system, and financial support (Srivastava 2016, Ohara 2021). Although their motives and approaches vary, they share the common belief that LFPS could be a solution to achieve quality education.

Tooley's demonstration of LFPS as representing a 'profitable sector' mobilized support from investors including internationally influential ones (Riep 2014). The world's largest publisher, Pearson established a fund named Pearson Affordable Learning Fund (PALF) in 2012 to invest in local edupreneurs providing affordable learning in developing countries. For Pearson, PALF was a means to gain knowledge of the successful 'Bottom of the Pyramid (BOP) business model', whereby the publisher might seek an opportunity to take advantage of (Ohara 2021). Recipients of PALF's investment include Omega Schools, a chain of LFPS in Ghana. The Omega School was co-founded in 2009 by Tooley and Donkoh, a Ghanaian entrepreneur (Riep 2014). Bridge International Academies, another chain of more than 130 LFPS providing education in Kenya, Nigeria, Uganda, India and Liberia, is also a recipient of PALF's investment. Apart from PALF, Bridge has received funding from International Finance Corporation (IFC), the UK's Department for International Development (DFID) and Facebook since it was founded in 2013.

Referring to the expansion of LFPS and their worldwide support network, Nambissan and Ball (2010) explain that "a complex of funding, exchange, cross-referencing, dissemination and mutual sponsorship" links the LFPS and their support network in one country and "connects it to other countries in a global network for neoliberalism" (p.324). What draws attention is that these networks are expanding even in countries where they are technically illegal (e.g. India and Kenya) owing to the fact that government schools are dysfunctional. A recent tendency, however, is the emergence of opposing arguments of LFPS, which criticize existing LFPS for 'profiting from the poor' (Riep 2014; Junemann & Ball 2015).

3.6. The debate on the governmental engagement with LFPS

This section reviews the literature that reflects various opinions on the issue of the governmental engagement with LFPS. There are those who argue that governments should support LFPS by various means. For example, Oketch et al. (2010) state that pupils in LFPS in informal settlements of Nairobi, Kenya, frequently move from one school to another most likely in search of better-quality education. Such mobility is among LFPS or from public to LFPS but not the reverse. They argue that because LFPS already meet the needs of residents in informal settlements in spite of free primary education, there is already a natural public-private partnership. Accordingly, they suggest that the government can support the sector by the use of vouchers or other funding mechanisms (Oketch et al. 2010). However, Alcott and Rose (2016) claim that the poorest are much less likely to be enrolled in private school, as such, even voucher programs are unlikely

to solve the existing learning gaps. Others mention that simply covering lunch costs could support the access of more poor and vulnerable children to LFPS (Heyneman & Stern 2014). Tooley (2017) argues that LFPS have to be at least accepted as a temporary solution. In terms of regulation, a recent study in cities in Nigeria, Ghana and Uganda shows that regulation by the government is not working and paying bribes to officials for registration is common (Härmä 2019). Yet, Härmä argues that the government may soften its attitude towards them as they are responding to the insufficient supply and/or quality of government schools and serve the very real needs of the poor (*ibid.*).

In contrast, Lewin (2007) clearly argues that LFPS are unlikely to reach the ultra-poor and the lowest 20% who are out of school as the private sector is self-determined and self-locating in terms of target and place. Thus, he claims that the government should remain the primary responsible body for meeting their needs. Alcott and Rose (2016) articulate that the mere expansion of private provision is unlikely to solve the global learning crisis. Still, others also indicate the necessity of putting more resources into the public sector in order to restrict the growth of the private education sector, particularly unrecognized or unregistered schools (Edwards Jr. et al. 2017, pp.34–35; Baum et al. 2018, p.112). Their views include the government's failure to regulate LFPS as they are unlikely to meet effective and equitable quality education for all learners.

Whichever the direction is, a significant challenge remains that “states often lack the knowledge, capacity and legitimacy to implement policy frameworks for collaboration with, and regulation of, non-state schools” (Day Ashley & Wales 2015, p.5). We will discuss this issue further in the following section.

4. Discussion: Problematizing the current debate around LFPS

There has been extensive empirical research and debate around LFPS in the last 20 years, with more and wider participation in writing and reviewing papers in the last 10 years in particular. This reveals the fact that LFPS have gained wider attention amongst the international community which is a great step towards responding to the lasting and unsolved issues of meeting the needs of quality education for the poor and marginalized. Having said that, this paper identified some critical issues in existing research.

First, as mentioned in Section 2, the present study found a wide variety of private schools that are included in LFPS discussion. While some studies specifically focus on LFPS, others discuss them in the context of the private sector at large. As LFPS differ from (elite) private schools serving middle to upper-income households in terms of registration status, regulations and management, it is necessary to differentiate the former from the latter.

Second, the terms ‘accessibility’ and ‘quality’ remain moot and are often overlooked. For instance, in the case of the former, research often looks at those who are in school instead of out-of-school children and ignores those with disabilities and other forms of vulnerability. In the latter case, many studies compare learning outcomes or learning conditions in relation to government schools and posit arguments against them in terms of how much better the private sector is. However, as alluded to in sections 3.1 and 3.2, ‘better’ does not necessarily mean that pupils have an acceptable quality of education (Day Ashley & Wales 2015). Furthermore, the notion of quality education itself is highly contentious and should not be seen as a technically neutral concept that can be applied universally to all contexts. Thus, instead of competing with each other, the question of how to raise the quality of learning for both public and LFPS is imperative and open to further discussion.

Third, there seems to be a tendency for research to cover certain regions or countries. The literature reviewed in the present study found that studies on LFPS are mainly limited to South Asia and sub-Saharan African countries that are predominantly members of the commonwealth. Thus, those countries in which the official language is French for instance have scarcely been investigated³⁾, although this also may be a bias caused by authors not speaking French.

Fourth, in relation to the research tendency, another peculiarity is knowledge emphasizing ‘rigorous’ research. Criteria for accepting existing knowledge of LFPS is mostly limited to studies employing ‘rigorous methodology’ and those utilizing qualitative research that reflects local voices tend to be excluded from such reviews. While how ‘facts’ are recognized in social science is another debate, removing non-rigorous studies may produce knowledge that reflects certain perspectives on LFPS, leaving all the other valuable information and reality covered up. As Takayama (2017) cautions, since contemporary educational knowledge and research are created by the North with “datafication” of education systems (p.12), we need to be more critical about the way in which rigorous and quantitative data shape the direction of global

discussion. Such conclusions may eventually lead to the lack of a comprehensive understanding of the role and function of LFPS.

Finally, it seems that the overall discussion concentrates on dichotomous ideologies, i.e., neoliberal market versus welfare and egalitarian state ideologies. On the one hand, those who support LFPS base their argument on the neoliberal assumption that market-oriented school choice is efficient in terms of the costs and benefits of school operation and that such a choice eventually leads to better learning outcomes for the poor and marginalized. This neoliberal ideology is rooted in a functionalist view that reflects Western epistemology, which holds that independent individuals make a rational choice.

However, this may not be the case as authors have observed how local stakeholders (school owners, teachers, parents, etc.) make a decision based on the milieu they are faced with. Often, the reasons owners open a school is for reciprocal relationships within their communities that are founded on local values and norms and not necessarily for financial return (Ohba 2021). Teachers in LFPS often choose to work at a particular school not only in search of better payment but because they know the headteacher or have relatives studying there. Likewise, parents may choose a particular school because the school meets their specific needs rather than simply raising academic performance. Thus, there are complex reasons for school choice that cannot necessarily be explained from neoliberal assumptions deeply entrenched in the Western ontology.

On the other hand, those who oppose market-driven education counterargue that it cannot meet the needs of the most vulnerable people. Those who claim that the government should improve the quality of education also need to be realistic as it is the failure of the government that has created the rise of LFPS. The fact that government welfare intervention through free primary education, which is driven by international and donor communities, does not necessarily promote redistribution of limited resources to the poor and marginalised is the consequence of the rise of LFPS. Our intention here is however not to merely highlight the failure of the government in the global South to offer quality education to its citizens. Rather, more critically, this paper argues that attention should be paid to the fact that many governments in the global South had to rapidly expand basic education in order to meet the ‘universal’ goals of education for all (EFA), even though they suffered from scarce resources, as a result of neoliberal policies since the introduction of structural adjustment policies (SAPs). The fact that universal primary education enables more children to access and complete this level does not necessarily mean that such an intervention is equally enjoyed by all children. Thus, merely requesting more of the government without realistic solutions for unrecognized and unregistered LFPS may not solve the existing issues.

The authors recognise that those who have the least in terms of socioeconomic and political powers are those who are currently excluded from both public and private spheres. They have access to neither government schools nor LFPS and are forgotten even in research. While there seems to be increasing discussion about how to deal with LFPS in recent years (Härmä 2021), we underscore attention is necessary to those invisible individuals who are out of school. Furthermore, it is imperative to listen to local voices. What seems to be missing in the present global debate on LFPS is to include voices of the global South, particularly those who do not have any social relations with relatively large local/national/international organisations, which we assume are the major contributors to LFPS. As Walford (2015) makes a precise point of noting, owners of LFPS in most cases are not concerned with the market ideology of making a profit; rather, they simply open a school to help their local children get an education. Thus, ideological discussion will not help local people to solve issues. Rigorous literature reviews conducted by the North should pay more attention to local contexts and voices from the global South that are not necessarily formed in the minds of individuals with ‘efficient’, ‘effective’ or ‘rational’ views of the world.

5. Conclusions

This study critically reviewed existing literature of the last 20 years in order to identify research gaps. While there are extensive volumes of research conducted around LFPS, studies are still mostly limited to some commonwealth countries in South Asia and sub-Saharan Africa. The present study also identified that reviews of existing literature tend to focus more on a functional approach, neglecting studies that explore detailed explanations, processes, and voices on the ground in the global South. Furthermore, studies on equity are particularly concentrated on the poor and gender with limited research conducted on children with disabilities, for example. Thus, there seems to be a research gap in this area.

The authors also note that the existing literature tends to concentrate more on dichotomous ideologies of the state versus the private sector instead of how to respond to the needs and issues of unregulated and unregistered schools and children out of school. These are profoundly important issues as vulnerable people are powerless and are often oppressed, their views are rarely reflected in the existing literature on LFPS, which is dominated by the scholars of the global North. We believe that those who are for or against the growth of LFPS eventually seek the same goal, that is, how to provide quality education for those who are excluded from existing education systems.

What needs to be done, therefore, is to find solutions for the running of LFPS since most of them operate and manage outside their present education systems with little support from their local governments. And yet, it is these schools that often meet the needs of the poor and vulnerable with scarce human and financial resources.

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Notes

- 1) Bridge International Academies (23 schools), BRAC (20 schools), Omega Schools (19 schools), Street Children (12 schools), More than Me (6 schools), Rising Academies (5 schools), Youth Movement for Collective Action (4 schools) and Stella Maris (4 schools) (Dixon & Humble 2019, p.126).
- 2) Philanthropic schools include non-governmental organizations and community support organizations. Religious schools are those education providers whose foundational ideology is religious (Wales et al. 2015).
- 3) Lange (2021) presents education privatisation in 17 countries in French-speaking sub-Saharan Africa and Haiti. The paper includes LFPS to some extent, yet, its main focus is the evolutions and forms of the private sector in these countries.

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Toward Religious Education for All Religions: Reducing the Education Gap Based on Indonesia's Religious Inherency

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Abstract

The concern of providing religious education for all religions (REFAL) in Indonesia is being discussed in this study. It points out whether religious education is perceived as a subject or value from the perspective of multi-religious teachers and students, based on the context of urban and rural areas in Indonesia. This study also aims to show the social-religious complementary function which exists in religious communities later called religious inherency in edu-community. The religious education practices in this study are categorized into religious subject, teacher availability, teacher competency development program, learning materials, learning assessment, learning facilities, and learning activity. They lead to the existing gaps in the practice of religious education equality for each religion. Edu-community has the scheme of educational practice for reducing the religious education gaps to serve 'each religion each education'. This scheme entails the existence of religious inherency to evoke another social function in society.

Keywords: educational equality, religious education, religious inherency

1. Background

The recognition of religious education for all religions (REFAL) as part of the educational system has been insufficient in some countries that focus on mono-religious education based on a religious majority. This research chains religious education (RE) gaps to the religious inherency through social religious complementary function based on the case of Indonesia. Indonesia has six admitted religions: Islam, Christianity, Catholicism, Buddhism, Hinduism, and Confucianism, with Christianity separated into Christianity and Catholicism because of the differences in worship and holy Bible interpretation. Issues on REFAL have been increasing the religious education gap in many areas in Indonesia. In some countries, centering on REFAL may be questioned. Implementing RE can be derived from the ideology of the country itself. According to Davis & Miroshkinova (2013), the ideology of one country affects the preference of religious education practice in formal education. In secular countries such as Japan, the United States, Cuba, Uruguay, etc., they prohibit implementing RE in public schools. Moreover, other secular countries with certain major religious populations, such as Columbia, Austria, Spain, Germany, etc., allow RE practice for both public and private schools. Different from them, in other secular countries such as Kazakhstan and Azerbaijan, even though the majority of the religious population is Muslim, RE is not included in public school. In contrast, some religious countries, such as Malaysia and Pakistan which belong to Islamic countries, require Islamic education in the school curriculum. Therefore, the countries which implement RE mostly focus on mono-religious education based on the majority religion in the country. For instance, in Australia where about 86% of religious people are Christian, Christian Religious Education (CRE) is applied. Different from those countries, ideologically, Indonesia is not stated as a certain religious or a secular country like Malaysia as a Muslim country or Costa Rica as a Christian state. Moreover, religious education is required in both public and private schools and focuses on each religion each education.

The concept of delivering RE for all religions also has been introduced in the sub-Saharan African continent, such as Malawi and Ghana where it is called Multi-faith Education. Multi-faith education in these countries is centralized on Islam, Christian, and African Indigenous Religion (AIR) (Matemba & Addai-mununkum, 2017). As stated by Meyer

(2004), Multi-faith education in Ghana started in 1994 whereas Malawi started later around 1998 for primary and secondary education. The practice of multi-faith education also has challenges especially in providing qualified teachers for teaching multi-faith education. Matemba (2011) mentions that the obstacles of the implementation of multi-faith education especially in Malawi are related to teachers' need for pedagogical knowledge and lack of teacher's competency development programs in teaching multi-religious education. Thus, the challenges of the implementation of multi-faith education are that the teachers have limited knowledge of multi-faith education.

The ideal concept of implementing REFAL all over the nation may raise educational gaps in the context of Indonesia. This research considers Indonesia's Religious Inherency, a variety of social-complementary functions contained in the religious community, especially the RE equality that is realized through the educational functions. Estrada et al. (2019) mention that ensuring the quality of RE brings beneficial effects on the students. Religious inherency is the essence of religion which is attributive to an individual in the society. This is somehow connected to RE. Reflecting on the educational system of Indonesia, RE is a compulsory subject for every educational level in Indonesia as a response toward the Act of Educational System no. 20/2003, about RE. The consequence is that RE should be implemented all over the nation. Geographically, Indonesia is an archipelago nation traversed by the equator. It is recorded that more than 17,000 islands are included in the country (Geospatial Information Agency of Indonesia (2017), Goebel (2013), Federal Research Division (2004)). Besides, the Institutes of Southeast Asian Studies (ISEAS) and Statistical Institution Centre (BPS) report that 633 ethnicities exist in Indonesia (Joko & Triwahyudi, 2017). Moreover, comparing the settlement pattern of the country, the area setting can be divided into urban (55.3%) and rural (44.7%). The ratio of the settlement population is nearly fifty to fifty between urban and rural (Britannica inc., 2018). Despite those situations, religious education needs to be delivered throughout the country as written in the educational system policy which includes RE in the national curriculum.

This research tries to answer the following questions: a) by proposing RE as a compulsory subject, how is RE being perceived, as a subject or as value? b) how can the social function in the community reduce the gap in RE? Those points are expected to depict the existing RE gap and gap reduction strategy on RE in formal education. Then, it may reveal an alternative way to disseminate REFAL. It aims to show the delivery of equal religious education context and which factors are involved. It may identify the value of religious inherency and would potentially influence the RE in formal education.

The results of this study are developed based on cooperative interviews, focus group discussions, and observation as the instruments of a descriptive case study. It explores the perspective of multi-religious students, multi-religious teachers, and the headmasters of the sample schools. There are five headmasters, one vice-principal (academic affairs), eight religious subject teachers (Islamic Subject teacher, Christian Subject teacher, and Catholic Subject teacher), and fifteen students (Muslims, Christians, Catholics, Buddhists, and Confucianists) who are involved in the interview process. In addition, some governmental officers have been interviewed to see the policy regarding the implementation of compulsory religious education for all religions in the school curriculum. This research will focus on lower secondary public schools. In selecting the research target, the researchers conducted religious historical tracking to get a suitable multi-religious context to reach the research inquisition for both rural and urban areas. To that end, the researchers took the cases of Yogyakarta and Bangka Island. The analysis will adapt the Crisp-set Qualitative Comparative analysis (Ragin, 2014) to find out the religious education gap based on the condition in each research area.

2. Social-religious complementary function

The idea of a religious setting leads to the intercommunity perception in a multi-religious society. Cush (2014) mentions that community becomes one of the balances to raise religious understanding in worldviews. The existence of community as part of society may also influence the educational aspect, especially in formal education. In this research, the researchers desire to show the complementary function of the community in religion and education. Besides, it will explain how formal education involves a religious community to have a balanced religious education.

A community is characterized by having the same purpose and sharing a common belief. Therefore, some scholars who discuss about 'religious community' also mention 'faith community' because of the belief and community concern on worships and worshipness. In some countries, religious communities are centralized in worship places, such as a church, mosque, shrine, or temple. In the Danish context, religious communities were grouped into three groups; the Evangelical-

Lutheran Church (the National Church of Denmark), religious communities approved by the Danish Ministry of Ecclesiastical Affairs, and other minority religious communities and societies (The Danish Ministry of Ecclesiastical Affairs, 2006). Tippy (1918) states that a church or a worship place is a symbol of the religious community to maintain the morality of the believer. Moreover, as a non-secular country that has a religious character, recorded by the Ministry of Internal Affairs, in 2017, Indonesia had 344,039 recognized and 370 unrecognized religious-based communities (Masrukhin & Supaat, 2018). Those numbers show how society is concerned about religion. The religious community must be influencing the development of religions in Indonesia.

Moreover, people believe that religious communities must have social and spiritual functions to adjust to the norms which exist in society. VanderWeele (2017) raises that a religious community plays an important role in human development. In the relation between RE and religious community, they have interconnection to promote a good society (Orchard, 2015). However, despite social and spiritual functions, this research focuses on the social-complementary function in the community in serving REFAL in the case of Indonesia. Besides, in relation to RE, previous studies merely touch on the significance of RE on community. This research strives to see the community involvement in formal education in which a religious community scheme is created to solve insufficient religious education.

In this study, we call this 'Religious Inherency' and we deepen our consideration of how the reduction of religious disparities in the implementation of religious education is realized. Religious inherency is an essential feeling which lives in the religion and is attributive to an individual. The concept of religious inherency exists in the religious community and influences the community to take the part of serving religious education for all religions.

3. The religious education system in Indonesia

Applying REFAL may raise some issues, especially in a multi-religious country, but it can also be one way to engage the religious minority community (Barnes, 2014). Berglund & Shanneik (2016) mention two models of RE: 1) confessional approach, which means that religious education is applied *in* the religion. All the doctrine and knowledge are taught in the religious atmosphere; and 2) non-confessional approach, which means that the RE is taught outside of the religion. It is often called 'religious studies' or 'study of religion'. The concept of delivering RE needs to be clear whether providing education *into*, education *about*, or education *from* religion (Berglund & Shanneik, 2016; Engebretson et al., 2010). Education *into* religion means teaching one religion to the students so that they can learn about morals, values, and spirituality to develop their religious identity. This way of RE may be specified as a confessional approach by some theorists. Then, education *about* religion means that the students learn about more than one religion to promote academic understanding about religions. Lastly, education *from* religion means that it teaches religious education for the students by engaging the religious personal experience of the students. Those points must be considered in implementing RE in formal education.

In the Indonesian context, RE becomes the government's agenda since it was included in the National Curriculum as a compulsory subject. Also, it is integrated with moral education. It is to ensure the role and the policy of religious education, in the national constitution of the Republic of Indonesia number 20/2003 about National Educational System, chapter VI part nine, article 30, points 1 to 5 about RE. It mentions that:

- (1) RE is provided by the government and/or by any group of people belonging to the same religion in accordance with the law in force.
 - (2) RE has the function to prepare learners to become community members who understand and practice religious values and/or acquire expertise in religious studies.
 - (3) RE can be conducted through formal education, non-formal education, and informal education.
 - (4) RE can take the form of *diniyah* education (Islamic early education), *pesantren* (Islamic boarding school), *pasraman* (Hinduism education), *pabhaja samanera* (Buddhism education program), and other education forms of a similar type.
 - (5) The implementation of the provisions for RE, outlined in verse (1), verse (2), verse (3), and verse (4), shall be further stipulated by the Government Regulation.
- (Government of Republic of Indonesia, 2003)

In addition, in the same bill article 37, it is stated that RE must be included in all levels of education; **basic, secondary,**

and **higher level**. Then, it is described in detail in government regulation no. 55 in 2007 (the Republic of Indonesia, 2007). Thus, the religious subject becomes one of the obligation subjects in the national curriculum, as found in the *Kurikulum Berbasis Kompetensi* (KBK) ‘Competence-Based Curriculum’ (Karim, 2002), *Kurikulum Tingkat Satuan Pendidikan* (KTSP) ‘Educational Unit Level Curriculum’ (Karsidi, 2006), and *Kurikulum 2013* ‘Curriculum of 2013’ (Kementrian Pendidikan dan Kebudayaan RI, 2013). Concerning REFAL, religious education in Indonesia is separated into Islamic Religious Education (IRE), Christian Religious Education (CRE), Catholic Religious Education (CaRE), Buddhist Religious Education (BRE), Hindu Religious Education (HRE), and Confucian Religious Education (CoRE). Religious education is organized specifically by the Ministry of Religious Affairs (MORA) and the Ministry of Education and Culture (MOEC).

Mainly, the religious education curriculum is designed by the MORA. Under the control of MORA, both public and private schools are considered as religious schools that fully apply the religious curriculum, including Islamic schools, Christian schools, Catholic schools, etc. Whereas in the public school under the MOEC, the religious subject is a compulsory subject which has different time allocation in each level according to the national curriculum implemented in Indonesia. Thus, religious education is an obligation as stated in the Indonesia National Educational System. By deciding RE as a compulsory subject, it is included in the evaluation process that the students should pass to continue to the next grade.

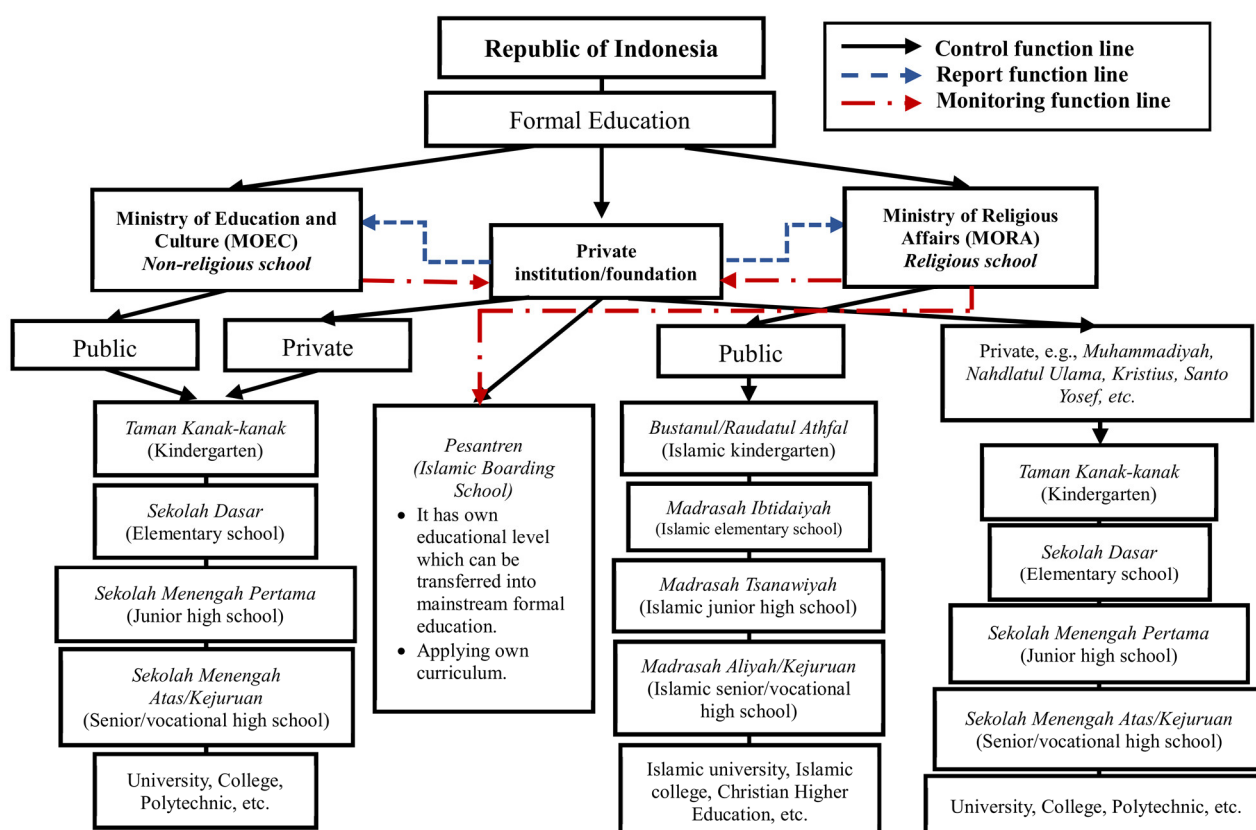


Figure 1. Religious Education in Indonesian formal education

Source: Developed and adapted by the authors based on statistical data on education in Indonesia

4. Religious education status in Indonesia

In the Indonesian education system, RE allows children and students of each religion to receive their religious education. In 1966, the religious subject became a compulsory subject in public school from elementary to university in Indonesia due to several reasons including the following: a) preventing religious conflicts from influencing the students and b) the significance of religion in national politics. It was under the result of the decision in TAP MPRS (*Ketetapan Majelis*

Permusyawaratan Rakyat Sementara ‘the Temporary Legislatives Decision’) No. XXII/MPRS 1966. Briefly, after the national curriculum had been released in 1984, the government launched the National Education System which specifies that religious subjects must be taught for both public or private schools based on certain religions. It was strengthened by Government Regulation No. 29/1990. In 2007, the National Government Regulation no. 55/2007 as the guidelines of RE was introduced. It contains the implementing guidance of religious subjects in formal schools. Then, the Ministry of Religious Affairs revised the previous regulation into MORA policy no. 16/2010 about RE management guidance for schools (Ministry of Religious Affairs, 2010).

As stated in the current curriculum, Curriculum 2013, each educational level has a different time allocation for RE. For public schools, **time allocation of religious subjects for elementary level is four hours a week and three hours a week for junior and senior high school levels.** Moreover, the main objective of RE content is character education. As in Educational Law of Indonesia, RE expects ‘to develop the character, competence, and civilization to enlighten the way of their life, and aimed to create a good human being to become creative, skillful, healthy, learned, independent, promoting peace, responsible citizenship, and democratic’. Besides, it is written that RE is meant to build understanding for the student’s way of life to perceive the language, habits, culture, etc. in diversity and hold the social norms and values which exist in the society. By integrating character education and religious values in RE, the Indonesian government expects that it may shape good characters as human beings and emphasize the self-identity and national identity of the students.

Concerning REFAL, RE should be accessed by the multi-religious students according to their religions as stated in the national regulation and educational system of Indonesia. As the consequence, both urban and rural areas should deliver RE in formal schools. According to educational statistic data of Indonesia, Indonesia has a total number of around 40.3 million students in the academic year 2019/2020 from elementary level to higher secondary level. That population includes Muslim, Christian, Catholic, Buddhist, Hindu, and Confucian students.

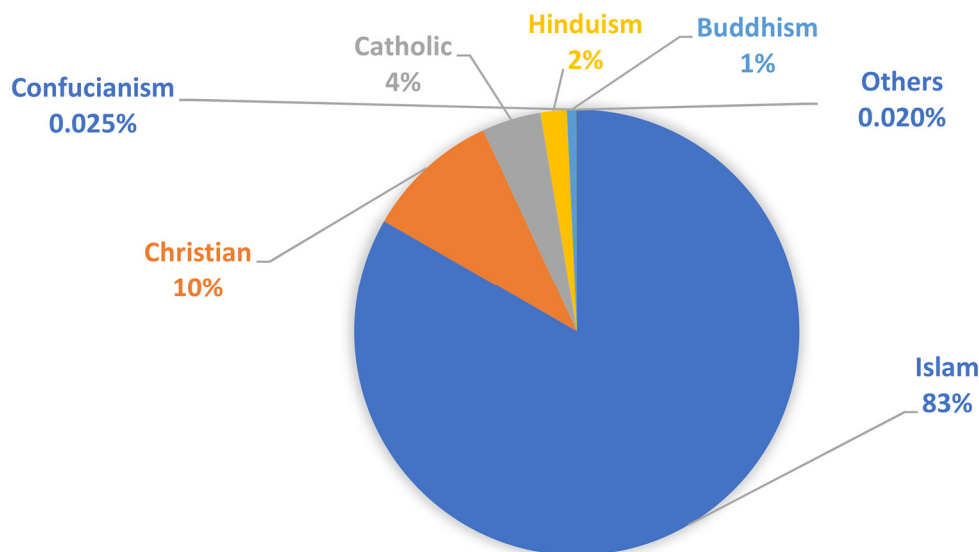


Figure 2. Indonesian Students' Population Based on Religions in Academic Year 2019/2020

Sources: Statistical data of Elementary School, 2020; Statistical data of Junior High School, 2020; Statistical data of Senior High School, 2020

In Figure 2, the percentage of students' religious population is dominated by Muslim students, about 83%, whereas, the smallest religious population of the students is Confucian students, about 0.025%. As a consequence of the multi-religious context and concern on REFAL, Indonesia tries to ensure the delivery of equal religious education even though the biggest population is Islam. Therefore, the practice of serving religious education to all areas in Indonesia can be difficult as Indonesia has around 17,000 islands. Delivering religious education equality to all in both urban and rural areas is accompanied by difficulties, especially in rural areas. The rural bias often appears in investigating educational equality in urban and rural cases (Ahsan et al., 2020). Besides, they add that the educational gap between rural and urban tends to influence the students' cognition. Thus, for implementing the practice of REFAL, it is important for Indonesian

policymakers to invest not only for equality but also for the efficient practice of RE. Therefore, the equality practice must be underlined to create an equality scheme of religious education, especially for religious minorities in formal education.

5. The research context and research design

Judging equality and inequality should involve suitable indicators. It should cover multiple levels of education such as the resources, access, involvement, and results (Antoninis et al., 2016). Those indicators must be considered according to the context of the society itself. In social and political philosophy, the influence of freedom and culture need to be noticed in order to depict the practice of educational bias (Dewey, 1989). Moreover, the contextual equality concept in the society may set the new stage to create a community or nation according to the diversity and form the identity (Anderson, 2006). To find out the religious education gap, investigating the case of multi-religious urban and rural areas is necessary. Therefore, Yogyakarta and Bangka Island have been chosen based on the religious historical tracking approach and multi-religious population context. Both Yogyakarta and Bangka have uniquenesses in the multi-religious aspects.

Yogyakarta is considered one of the metropolitan cities in Indonesia which has the privilege of being a monarchy-based city. It holds a strong Javanese cultural identity as the fundamental idea of living. Yogyakarta is also well known as the city of culture and tolerance in which diverse cultures, religions, and ethnicities exist (Kamil, 2018). Geographically, Yogyakarta is located in Central Java. Besides, the most active volcano on Java island, Merapi mountain is in Yogyakarta. Historically, the northern part of Yogyakarta is the location of Borobudur temple, the biggest Buddhist temple in the world. It was built around the 8th century as the symbol of ancient Buddhism Mataram Kingdom in Java (Dewanti, 2018). Moreover, the greatest symbol of ancient Hinduism, the Prambanan Temple is also in Yogyakarta. It was built around the 9th century as a symbol of the glory of Hinduism in Java (Pramumijoyo et al., 2009). In the past, it was utilized as the worshipping place to pray for the King and God (Aldiansyah, 2018). Moreover, in the 16th century, Yogyakarta was under the authority of the Demak Kingdom and the Islam Mataram Kingdom. Then, one of the biggest Islamic organizations in Indonesia, Muhammadiyah, was rising in the 16th century. Thus, those religious histories must affect the religious population in this area.

Furthermore, Bangka Island is a small island and one of the parts of Bangka Belitung, a young province being declared on December 20th, 2000, located in South Sumatra. It is one of the biggest tin suppliers in the world. This area is mainly dominated by two ethnicities, Malay and Chinese which share cultures, languages, and religions in the same villages. Historically, according to Sujitno (2011), the Bangka strait is part of the silk trade route in the 2nd century. Many traders from the Arabian plateau, Europe, Portugal, China, etc. were one of the origins of the population in this area. Moreover, in the 9th century, the western part of Indonesia including the Bangka strait was under the authority of a Buddhist Kingdom, Sriwijaya Kingdom. It was involved in a trading relationship with the Tang Dynasty from Mainland China. As a consequence, Bangka architecture is also affected by the Chinese and Buddhist cultures. Then, in the 13th century, the Samudra Pasai Kingdom from Lhokseumawe, Aceh, took over this area. It influences the increase of the Muslim population in the Sumatra peninsula including Bangka. Thus, this developing area is considered as the multi-religious context for this research.

Previous studies on religious education delivery practice (Hayadin, 2017) and religious education service index in Indonesia (Hayadin, 2018) show positive results on the practice of REFAL. On the other hand, previous studies focus more on the higher secondary level in capital cities in Indonesia. To fill the gaps, this research focuses on investigating the case of the lower secondary level. The researchers decided to describe this case research qualitatively by doing cooperative interviews, observation, and focus-group discussions based on a social approach. Information was gathered from the perspectives of headmasters, multi-religious subject teachers, and multi-religious students. It is analyzed by adapting the truth table in Qualitative Comparative Analysis to show the religious education practice and get religious education gap based on the condition of the research fields.

Figure 3 shows the multi-religious population of the school samples in Yogyakarta and Bangka. In the public schools, most of the students are Muslim both in Yogyakarta (94%) and Bangka (96%). Then, the researchers have conducted interviews and focus group discussions with around five headmasters, one vice-principal (academic affairs), eight religious subject teachers (Islamic Subject teacher, Christian Subject teacher, and Catholic Subject teacher), and fifteen students (Muslims, Christians, Catholics, Buddhists, and Confucianists). Besides referring to the Indonesia national

document on religious education, e-interview (e-mail and e-chat) have also been conducted with the government officers of the Ministry of Religious Affairs of Indonesia. Thus, this information will be significant as policy referring to religious education.

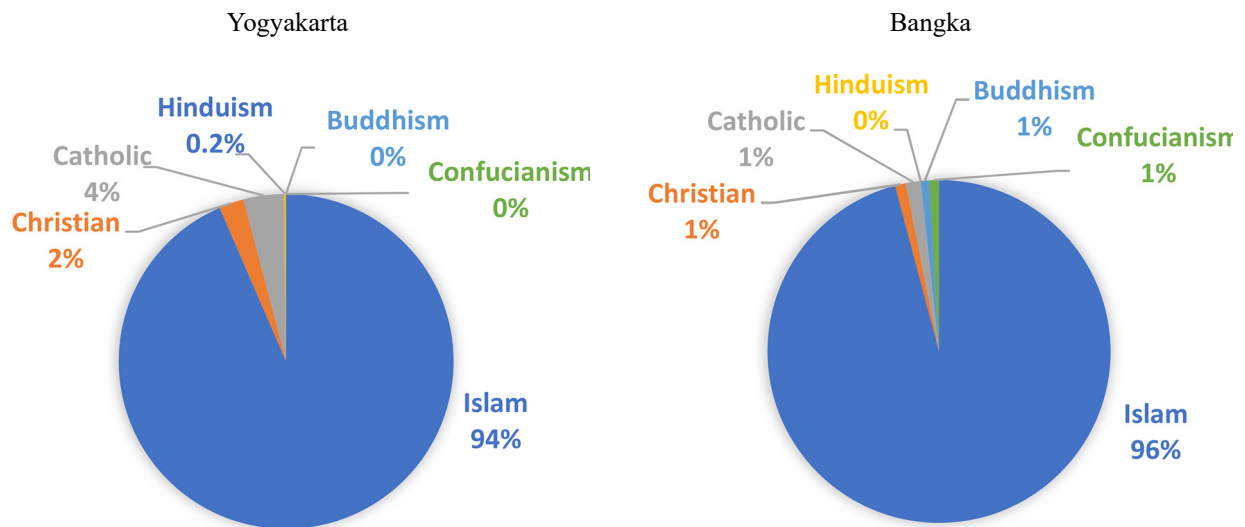


Figure 3. Religious population in the school's samples

Notes:

- Six public Junior High Schools have been selected as the research samples.
- The total population of the students in Yogyakarta's school samples is 1,167 students.
- The total population of the students in Bangka's school samples is 997 students.

6. Analysis and discussion

Discussing the religious education gap in Indonesia, it is necessary to mention national policy and strategies regarding RE. The researchers refer to some secondary data taken from the national document of Indonesia, such as a) **UUD 1945** (*Undang-Undang Dasar* 1945 is the Legislation base for policy making and law in Indonesia); b) **Constitution no. 20/2003** about the **National Educational System**; c) **Government policy no. 5/2007** about **Religion and Religious Education**; d) **Ministry policy no. 16/2010** about **Religious Subject Guidance in School**; and e) **Curriculum of Education 2013** (revised version). The researchers also conducted e-interviews with the officers of the Ministry of Religious Affairs of Indonesia. Below, we sum up some general policies and strategies regarding the policy of delivering REFAL in Indonesia; a) every student has the right to get RE based on their religion, taught by teachers based on their religion; b) religious subject is a compulsory subject; 4 hours/week for elementary level; 3 hours/week for lower and higher secondary level; c) religious subject class can be opened only if the number of religious students reaches at least 15 students in the same grade and d) the school which has less than 15 students of one religion has no obligation to provide a religious subject teacher; e) religious education can be provided by a religious institution or religious community; f) competency development program is provided for RE subject teacher; g) the government provides the learning materials for RE.

According to the national policy, RE in Indonesia should be separated based on the legal religions that exist in Indonesia; Islamic Religious Education (IRE), Christian Religious Education (CRE), Catholic Religious Education (CaRE), Buddhist Religious Education (BRE), Hindu Religious Education (HRE), and Confucianism Religious Education (CoRE). They put RE as a compulsory subject from the lowest level to the highest level of education. Point c above means that if a school has fifteen or more students who belong to one religion, the school needs to provide religious subject teachers according to the student's religion. The school can cooperate with MORA in each regency and the Department of Education in each area for providing religious subject teachers. Besides, point e above means that religious communities can also provide and hold RE for society. To ensure RE practice, the government also provides a competency development program for the religious subject teachers and learning material for the students, which is organized by each local Department of Education.

Furthermore, measuring equality in education must have appropriate indicators. Proposing RE equality, it is necessary to describe the educational practice in each school sample (SS). As educational practice context, this study will consider religious subject teacher availability, teacher competency development program, learning materials, learning assessment, learning facilities, and learning activity. REFAL practice in Yogyakarta and Bangka is shown in the following truth table.

Table 1. Truth table of REFAL practice in Yogyakarta and Bangka

	Conditions of REFAL practice							Status of REFAL practice					
	A	B	C	D	E	F	G	X ₁	X ₂	X ₃	X ₄	X ₅	X ₆
SS1	1	1	1	1	1	1	1	1	1	1	-	1	-
SS2	1	1	1	1	1	1	1	1	1	1	-	1	-
SS3	1	1	1	1	1	1	1	1	1	1	-	-	-
SS4	0	0	1	1	1	0	0	1	-	0	0	-	0
SS5	0	0	1	1	0	0	0	1	0	0	0	-	0
SS6	0	0	1	1	1	0	0	1	1	1	0	-	0

Notes:

- SS: school sample
- 1: yes (will be described using capital letter); 0: no (will be described using lowercase letter); -: no religious population
- Conditions: A: Urban school; B: Teacher availability; C: Teacher competency development program; D: Learning materials; E: Learning assessment; F: Learning facilities; G: learning activity.
- Status: X₁: IRE; X₂: CRE; X₃: CaRE; X₄: BRE; X₅: HRE; X₆: CoRE.

As shown in Table 1 above, Islamic religious education (X₁) is generally well delivered for Muslim students because about 95% of the school population is Muslim and IRE must be delivered in the school. As a result, IRE still becomes the main concern of schools, both in urban and rural areas. In the urban case, the table shows X₁, X₂, X₃, X₅=ABCDEFG. It means that in urban schools, all aspects of REFAL such as religious subject teacher, teacher competency development program, learning materials, learning assessment, learning facilities, and learning activities, are sufficient for all non-Muslim students to RE according to their religions. Owing to the multi-religious population setting in the urban school, each religion can get RE according to their religion. Concerning the competency development program, the teachers usually have spiritual building training and subject teacher discussion which is a regular meeting to discuss the issue of RE. Then, the learning assessments are done by each religious subject teacher. To support the learning process of religious education, learning material is also provided, such as a package book based on the Curriculum 2013 (MOEC recommendation), teacher guidance, and student worksheet. Then, learning facilities also have been built to support the RE learning process, providing facilities such as classrooms, religious rooms for non-Muslim students, and *Musholla* (praying room for Muslims). Besides, the students also have religious activities in the school, for example, reciting the Holy *Qur'an* (Holy book for Muslims), praying congregation, *qurban* (cattle slaughter tradition in Islam), extracurricular activities, *Ramadhan* tradition (fasting month) for Muslims, then religious celebration days, religious singing, *retreat* (intensive education for Christians and Catholics), visiting religious places for Christians and Catholics.

On the other hand, in rural schools, there are gap conditions in serving religious education for all religions (REFAL), especially for non-Muslim students. Mostly, religious education in Bangka applies integrated Islamic religious education in which non-Muslim students learn IRE. As around 96% of the religious population is Muslim, IRE is served well. Islamic subject teacher is enough for the Muslim students. IRE is also supported with *musholla*/mosque (praying room). Besides, school activities for Muslims are also varied, for example, reciting the Holy *Qur'an*, praying congregation, religions' celebration day, *khataman* (celebration for completing reciting Holy *Qur'an* for the children), etc. Therefore, it is different from other religious education. In the case of SS4, it can be described as x₃ (CaRE), x₄ (BRE), x₆ (CoRE)=abcDEfg. It means that it is a rural school (a) and there is no religious subject teacher (b) for CaRE, BRE, and CoRE. As a result, Catholic, Buddhist, and Confucian students cannot get religious education according to their religion. CD means that the religious subject teacher has a competency development program, such as subject teacher discussion and Islamic subject teacher group meeting, then most learning materials such as package book based on the Curriculum 2013 (MOEC recommendation), teacher guidance, and student worksheet are provided by the government. In Indonesia,

each public school will get a fund called BOS (Student Operational Assistance) to support students' learning including the learning materials. In RE, there are five kinds of assessments; a) daily test; b) mid-semester examination; c) school examination; d) practical examination; and f) national standard final examination. E shows the learning assessment situation in SS4, in which, one of the learning assessments for the non-Muslim students is done by involving the religious community. Moreover, in the case of SS4, REFAL based learning assessment is only done in the practical examination as stated by P19, a male IRE subject teacher in SS4.

Pengambilan nilai ni, dulu pernah Bapak. Tapi, untuk nilai ulangan praktek. Tapi, praktek bai. Karena dak mungkin kan kita suruh praktek dalam agama kita. Karena dulu kan bingung kan nak ngambik nilai praktek gimana, sedangkan nilai praktek tu harus ada sehingga seperti itu solusi e.

Yes, I have cooperated with the religious community (for non-Muslim students). It is only for the practical examination. It is because it is impossible for them to have a practical examination in the Islam religion. On the other hand, this assessment is important as the final report element so I decided to do it that way. (translated by the authors)

Based on the statement above, P19 mentions that the school tries to cooperate with the religious community regarding learning assessment, especially in the practical examination. However, in other learning assessments, non-Muslim students mostly follow Islamic subject examinations. Furthermore, fg in x_3 (CaRE), x_4 (BRE), x_6 (CoRE) = bCDEfg of SS4 means that there are no specific learning facilities and activities for CaRE, BRE, and CoRE. During the learning process of religious education, non-Muslim students can decide whether they want to join IRE or go to the library to do independent learning.

In the case of non-IRE in SS5, it can be described as x_2 (CRE), x_3 (CaRE), x_4 (BRE), x_6 (CoRE) = abCDEfg. In the SS5, the delivery of religious education is using almost totally integrated Islamic religious education. x_2 (CRE), x_3 (CaRE), x_4 (BRE), x_6 (CoRE) = abCDEfg show that SS5 is a rural school that also does not have religious subject teachers for CRE, CaRE, BRE, and CoRE. Then, non-Muslim students mostly join the Islamic religious education. Related to the teacher competency development program and learning materials, they are provided by the government. Therefore, non-Muslim students join the learning assessment of IRE except for practical examination. Then, there are no specific learning facilities and learning activities for non-Muslim students.

Furthermore, SS6 has different cases from other rural schools except for the case of X_1 (IRE) which is sufficient. It can be described as follows.

$$\begin{aligned} X_2 \text{ (CRE), } X_3 \text{ (CaRE)} &= \text{abCDEfg} \\ x_4 \text{ (BRE), } x_6 \text{ (CoRE)} &= \text{abCDEfg} \end{aligned}$$

The equation $XSS6 = \text{abCDEfg}$ shows that SS6 is an urban school (a) in which the availability of religious subject teachers for all religious population students is insufficient (b) even though, the government holds the religious subject teacher competency development program (C) and provide learning materials (D). Besides, they try to do the learning assessment based on the students' religions (E). However, certain facilities and activities based on the students' religions are missing, except for Islam, Christianity, and Catholicism. It can be said that CRE (X_2) and CaRE (X_3) in SS6 are sufficient. In SS6, only Muslim, Christian, and Catholic students can get religious education according to their religions. Religious community (church) is involved to deliver CRE and CaRE for Christian and Catholic students. During the learning process, the Priests from Church have their strategies on delivering CRE and CaRE to the students who adjust to the religious education curriculum as stated by P24, the headmaster of SS6 below.

We have Christian (Protestant), no Hindu, Buddhist from Chinese ethnic. But, the Buddhist student follows Christian education activities. For your information, we collaborate with Father or Priest. So, they usually come to teach and take the student to the Church in Koba town on Saturday. When we collected the data, there was 1 Buddhist student who follows it also for the score of the religious subject. Maybe, it is because joining Islamic subject is difficult for her so she joined the Christian class in the Church for getting the score. It is because this school is a little bit far from Koba town so no one can come here. I plan to collaborate with another junior high school in Koba, because they may have complete religious education teachers for all religions. But, for us, it is still difficult because of the number of students. So, they have no choice. They also can join Islamic religious

subject. Some non-Muslim students also join that class. (translated by the authors)

Although SS6 has five religious populations, Islam, Christian, Catholic, Buddhism, and Confucianism, only IRE, CRE, and CaRE can be delivered to the students. X_4 (BRE), x_6 (CoRE) = abCDEfg, indicates that there is insufficient practice for x_4 (BRE) and x_6 (CoRE) in SS6. As mentioned by P24, Buddhist students and Confucianist students can decide which religious class they consider to follow or visit the library during the religious subject period. Moreover, as stated by P24, most of the Confucian students join IRE and Buddhist students tend to join CRE.

It shows that the delivery strategy of religious education in urban schools is almost fully separated according to religions. Whereas, in rural schools' cases, they still implement integrated religious education in which multi-religious students not only learn in one religious subject class but also join in the religious school activities. As shown in Table 1, the practice of delivering religious education for all religions still faces gaps, especially in rural areas. The gaps are mainly related to the teacher availability, learning assessment, learning facilities, and learning activities for certain religious populations, especially for CRE, CaRE, BRE, HRE, and CoRE.

The religious education gaps mostly appear in the rural context. Those gaps are enacted to be the barriers to achieving religious education for all religions. They lead to inequality in the practice of religious education, especially in rural contexts. Referring to the status of religious education in Indonesia, religious education is a required subject for promotion and continuing to the next grade. Not taking religious subjects may be a drag on students and lower students' scores on various exams. The idea of religious education should be directed to the value of character formation for the students according to their religions. The existing religious education gaps bring the religious subject to the score-oriented religious subject for passing the exams, which leads to the different perspectives toward religious education. On the other hand, some teachers and students perceive it in different ways. P15 (Christian), a vice-principal of SS4 mentions that:

For Non-Muslim students, they decide it by themselves. In my opinion, if it is just for knowledge, it doesn't matter. For example, if I enter a mosque to listen to an Islamic lecture, it is not a problem for me. It doesn't mean that I should follow Islam. The point is that we can just learn a good deed from them (Muslims). That is my opinion. We never face a problem. Non-Muslim students also never disturb others. They can follow the class well and are never noisy. But, still, it depends on the Islamic subject teacher policy itself. (translated by the authors)

Reviewing RE as not only fulfilling subject requirements, P15 states that religious education can constitute inter-religious knowledge for multi-religious students. Besides, some students mention that being involved in religious education can be a way to faith recharging, which is missing in society. Therefore, the non-Muslim teachers and students believe that considering RE is important as a moral measurement.

In response to the existence of the religious education gap, especially in the rural context, it is found that there is a social function role of the religious community in formal education, which is later referred to as edu-community. In this case, the religious community shows its involvement in education by contributing to the provision of religious education for all religions. As stated by P19 above, the religious community is taking part in the learning assessment of religious education for non-Muslim students. Besides, the religious community is also involved in the learning process of CRE and CaRE in SS6. This edu-community shows the scheme of education in the form of 'religious inherency'. Religious inherency is part of religion and the believers as a particular linkage between the religious values and believers (Steffen, 2010). Therefore, religious inherency must be grown in the religious community as part of religious values itself. The involvement of the religious community in formal education also shows the strategy to form the students' religious inherency through formal education. Thus, there is a transfer of knowledge and values of RE from the social-complementary function to the formal education.

7. Conclusion

Emphasizing on REFAL is one of the ways of respecting and fulfilling the rights of getting education and religions. As pointed out in the national constitution about Educational System no. 20/2003, the Indonesian government considers religious education as a compulsory subject in each level of education in Indonesia. It is expected to encourage the character building of the students based on the religious and moral values which exist in society. Therefore, REFAL has been of concern for the student's development in Indonesia for both urban and rural contexts. The national government

has also established an educational system of religious education, such as learning materials, teacher competency development, teacher distribution, etc.

The idea of serving equal RE in Indonesia still leads to religious education gaps, especially in rural areas. Thus, the cases in the urban area are in line with the previous studies on serving RE according to religion (Hayadin, 2017) and the service index of RE (Hayadin, 2018) where most of the public schools in urban areas receive RE according to the religions. RE gaps become the indication of failing REFAL practice. RE tends to be considered as a subject taken in order to only fulfill grade promotion requirements. On the other hand, RE is also regarded as faith recharging and inter-religious knowledge for multi-religious students. Thus, perceiving RE as a subject and as value indicates the importance of religious education from the perspective of multi-religious teachers and students for both education for school requirement and education for life, especially in the religious society.

Moreover, the religious community shows social-complementary function which exists in society. Edu-community contains the educational scheme which grows inside society to participate in formal education in this case to achieve REFAL. Based on the study, the edu-community is shown by the existing involvement of the religious community to fulfill the gap of delivering equal education for each religion, especially in the rural area. The social-complementary function in the society activates the consciousness of the local religious community to support the practice of REFAL which, in this study, is found in the practice of CRE, CoRE, or BRE delivered by the local religious community. Those practices show that the RE equality gaps can be reduced by the support of the edu-community. In the context of a religious community, religious inherency appears and is formulated in the process of religious activities. Thus, religious inherency which is attributed to each religion has a scheme of religious knowledge and values transfer from the society to the students through formal education. Therefore, if looking back at the issue of implementing REFAL, especially in sub-Saharan African countries, in which issues are related to the teacher competency and availability, utilizing the social-complementary function that exists in the local religious community will be an alternative way to provide the same opportunity in RE.

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Exploring the Changes Brought by Emergency Distance Education in Malagasy Universities: Disparities Under COVID-19 at a Teacher Training Institution

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Abstract

The objective of this study is to understand the extent to which the implementation of emergency distance learning under COVID-19 brought changes to higher education in Madagascar, with a particular focus on disparity. Participant observation, an online questionnaire survey with 38 students, and interviews with 24 students were conducted at the *Ecole Normale Supérieure* of Antananarivo. The results showed that Malagasy higher education institutions implemented emergency distance learning with the means they had mostly based on teachers' initiatives. Contents typically taught face to face had to be compressed and adapted to an online medium to be taught in a limited time. Such settings highlighted the existing disparities among students and revealed the ones whose voices are rarely heard. While the tight schedule of a university is generally considered to be too inflexible for working students, their work proved to be vital for their ability to continue studying, which has little to do with lack of maturity as highlighted in previous studies. It was also shown that students who differ from the majority, such as those who have health issues or the slow learners, are also reluctant to assert themselves in class, which might necessitate a reconsideration of the relationship between students and instructors in Malagasy universities.

Keywords: distance education, COVID-19, disparity, Madagascar

1. Introduction

UNESCO reports that more than 1.5 billion students and youths have been affected by school closures worldwide (UNESCO, 2021). Countries have responded in different ways; the majority closed their campuses and many, especially developed economies, moved to total online education with rapid curriculum redevelopment, while others only partly implemented online education (Crawford et al., 2020). Governments, educational institutions, and teachers tried to find ways to avoid the disruption of education provision, and educators in developed countries found that they learned more about distance education within the first two months of the pandemic than they had in the last ten years (Dietrich et al., 2020). Schools used resources available to them, such as limited bandwidth, and adapted to their lack of preparation and training (ibid.). While some were on the edge of exacerbating the preexisting disparities due to the digital divide among students and teachers, others were able to use the resources available to them to keep providing education (Oluwatimilehin et al., 2021).

Madagascar, with its engagement in implementing the Bologna process, is introducing the Licence, Master, Doctorat (LMD) system and had begun the transition from lecture-based education to a student-centered approach, leaving 70 percent of the effort to students' personal research while only 30 percent is provided in class (MESupReS, n.d.). A policy document, the Education Sector Plan (ESP), describes the state's intentions to support higher education to provide quality and access through distance learning (MEN et al., 2017). As a result, support was provided to better equip the universities such as introducing computer rooms and free Internet connections on campus, which was intended to equitably help students with their studies outside the classroom.

With the novel coronavirus (COVID-19) outbreak, while access to the university was restricted, different departments attempted to implement a variety of methods to avoid class interruption. Along with the implementation of online learning, disparities are likely to arise because students no longer have access to the resources that are meant to even out their

inequalities at a time when they need them the most. The situation has been new to both students and instructors, but changes are being initiated. Considering such a background, the objective of this study is to understand to what extent the implementation of emergency distance learning has brought changes to higher education, with a particular focus on disparity.

2. Education response to COVID-19 in Madagascar

Madagascar is not new to education interruption due to natural disasters and health crises. Cyclones and plague outbreaks seasonally affect schools. For instance, due to a plague outbreak from August to November 2017 and a tropical cyclone in January 2018, schools were closed for several weeks, which required adjustment in the 2017–2018 school calendar to make up for the delay (MEN, 2018). Nevertheless, such interruptions have mostly affected primary and secondary schools and rarely higher education, which has a rather flexible, or, perhaps more appropriately, unstable calendar. The protracted nature of the COVID-19 crisis, however, is likely to affect higher education more greatly than the usual spell of interruption—two weeks of a cyclone or several weeks of students’ or teachers’ strike. Such difficulties have been managed by shifting the academic year around without a long-term impact on the university and the students. However, this time, it was vital to implement emergency distance learning.

The first three cases of COVID-19 in Madagascar were reported on March 20, 2020, to which the government responded by setting a lockdown for 14 days in accordance with the constitution. The lockdown was renewed every two weeks from March 2020 to October 18, 2020 (198 days). This period will be referred to as the first lockdown. Curfews were set, schools were closed, and movement between regions was restricted to varying degrees throughout the year. The lockdown was then lifted for 167 days until April 3, 2021, when the second series of lockdowns (hereafter, the second lockdown) started. The second lockdown lasted 153 days and was lifted on September 3, 2021.

Table 1. Lockdown and university situation during the pandemic

Lockdown status	Lockdown 1	No lockdown	Lockdown 2
Date	March 20, 2020 to October 18, 2020	October 18, 2020 to April 3, 2021	April 3, 2021 to September 3, 2021
Duration	198 days*	167 days	153 days
University situation	September 2020: University resumes 2018–2019 academic year	November 2020: University starts 2019–2020 academic year	June 2021: University resumes 2019–2020 academic year

Note: * There was no lockdown between September 5 and 18, 2020 (14 days), coinciding with the primary school national examination (CEPE). Source: Created by the authors based on decrees published between 2020 and 2021 (Republic of Madagascar, 2021)

During the lockdowns, the government issued different types of support, mostly for primary and, to some extent, secondary education, including the distribution of an enhanced traditional remedy allegedly effective to prevent and/or cure COVID-19 and radio and television broadcasts to support students’ learning at home when the access to school was restricted. Starting in May 2020, students in the final grades of primary, lower secondary, and upper secondary schools were allowed to go to school in order to prepare for the national examinations, which had been delayed. At the university level, however, the academic year was disturbed once again: The resumption of education began only in September 2020 to complete the 2018–2019 academic year. The 2019–2020 academic year started in November 2020 but was stopped again for three months (April to June 2021) by the second wave of the COVID-19 (see Table 1). To avoid a blank year—an academic year that needs to be repeated for the whole university—university semesters have been shortened after the recovery and were reduced from six to three months. Each department was responsible for finding a way to complete their programs.

The *Ecole Normale Supérieure* of Antananarivo (ENS) is a training setting for teachers in secondary schools. As students carry out their internships, their schedule depends on secondary schools, and their experience has not been spared by these upheavals. The first lockdown took teachers and students by surprise, as they were little prepared for distance teaching and learning. Some teachers made individual attempts at getting in touch with their students and providing a

semblance of continuity of teaching, but regional Internet coverage, costs of connection, and problems related to evaluation limited the efficiency of their initiatives. When restrictions were lifted, teachers classified as medically vulnerable implemented distance teaching and worked from home, with their students continuing to come to the university, which was possible with the relatively limited number of students enrolled per level for each department. This mechanism turned out to be preparation for the second lockdown toward the end of the following academic year and enabled a more elaborate continuity of learning.

Considering the situation above, the following research question is established. How does the distance teaching that has been implemented during the COVID-19 pandemic bring changes to universities, students' lives, and education?

3. Distance learning and disparity in the literature

Distance teaching, later called distance training to extend its field, is characterized by the physical separation between students and training providers/teachers (Rumble, 1992). The relationships between training space, time, and actions, which are the fundamental units for teaching and learning, are modified as compared to face-to-face teaching. The separation could be geographical, time-related (asynchronous work due to unavailability during normal hours), sociocultural and socioeconomic (rejection of school system due to medical reasons, age, work, previous failures), or technological (accessibility of training tools) depending on the constraints making up hurdles for the learner. Distance teaching is thus expected to favor inclusive education and access to knowledge for all, via synchronous or asynchronous activities, which could be performed by any learner, relocated or not, making it possible to provide equality of opportunity in education (Jacquinot, 1993; Glikman, 2002). However, the rollout of distance teaching in actual situations has revealed that the reality is quite different.

3.1. Human factors widening disparity in distance learning

The efficiency of distance teaching results from the articulation between the tools required, the human resources, that is, the teaching personnel, and the learner. Moreover, the learner's motivation and willingness to learn play a very important role in this process because the physical and material separation from the teacher eliminates direct interactions, encouragement, and blame, which would have ordinarily helped them make progress.

The works of Guillemet (2014) highlight some of the constraints that could influence students, especially adults or young adults. This population has more free time and is tempted to impinge their professional activities and family responsibilities on the time they should have initially dedicated to their studies. Thus, students' maturity in terms of personal organization, along with their socioeconomic difficulties, may favor inequality of opportunity.

A study conducted in 2016–2017 among first-year students at the University of Geneva showed that the rollout of sophisticated technological mechanisms for distance teaching provides more benefits to the strongest students, whose exam results improved by 2.5 percent, and more disadvantages to those who are less bright, whose results were 2 percent lower. The latter group needs to be identified by teachers when they give up, which is possible during face-to-face courses, as the teacher can re-explain notions specifically for them and improvise remediation activities. Therefore, distance teaching exacerbates the difference between stronger and weaker students, which is due to their intellectual maturity according to the authors (Cacault et al., 2021).

Other works, more recently, have been based on empirical surveys carried out during the COVID-19 pandemic, which accelerated the adoption of distance teaching by universities. They show that this form of teaching requires more attention, autonomy, and effort from the students. For their part, the teachers need to create more resources with particular precision for each stage of the teaching and carry out surveillance almost constantly when their students are using these resources in order to resolve eventual issues. The easing of space and time constraints is apparent only because the constraints are actually moved elsewhere (Tricot, 2021).

The change in the mode of interaction is part of this shift of constraints. In Pakistan for instance, students are reluctant to continue online learning due to the lack of face-to-face interaction with the instructors, the delay in their responses, and the lack of socialization with fellow students as described by Adnan & Anwar (2020). The students' preference for a certain mode of communication is likely to present some differences between cultures but also between students with the same cultural backgrounds.

3.2. Material constraints exacerbating disparities in distance education

Inequality may also come from other more material constraints linked to the learners' daily socioeconomic situation (Thompson, 2020) such as access to the Internet (less than a quarter of the African population has access) and television (in Guinea and Mauritania and the African continent, one home out of 100 has a television in rural areas, whereas 70 out of 100 have one in the urban areas.). Cellphones were also used for distance training, and according to Afrobarometer (2021), 92 percent of urban families and 87 percent of rural families in Africa have one. However, Madagascar has been reported to be the worst in this respect since 2008, as about a third of the population (29 percent) does not have access to a cellphone¹⁾. The difference in access to electronic devices and electricity between families is also a source of contrasts. While in many countries in Africa (Côte d'Ivoire, Lesotho, Kiribati, Sudan, Gambia, Guinea Bissau, and Mauritania), less than 10 percent of the poorest families have electricity, in Madagascar, only 13% of all families do (World Bank, 2020). Moreover, in most major cities, this access is interrupted by load shedding, power cuts due to insufficient electricity supply, that may last between several minutes and several hours, disturbing the users.

The contrasts within distance teaching may thus come from the students themselves, their socioeconomic and material conditions, their personality, their willingness to learn, and their competencies, but they also depend on the instrumented and human mediation of knowledge implemented by each teacher (Ratompomalala & Razafimbelo, 2020).

4. Distance learning in the universities of Madagascar

In 2021, Madagascar was ranked the 10th poorest country in the world²⁾ and was also among the poorest countries in the African continent. Very few publications about educational issues have emerged from there, especially within higher education.

The University of Madagascar regrouped all university settings in 1961, after independence was gained, and it was located in Antananarivo, the capital of the country. The Ecole Normale Level 3, which was created in 1980, was responsible for training secondary school teachers and later became the Ecole Normale Supérieure (ENS) when each of the six regions got their own universities in 1988. The ENS has been part of the University of Antananarivo since then.

Teaching in these universities was primarily only face-to-face; distance teaching was exclusively for the National Center of Remote Teaching of Madagascar (CNTEMAD), which was founded in 1992 to remediate overcrowding of students in universities. Madagascar was indeed among the countries with the highest demographic growth (3.0% in 2014 according to MEN et al. (2016)), and the existing infrastructure struggled to receive new students every year. The budget granted by the government to the education sector is used at 80 percent of current expenditures, and only 7 percent is used for investment (infrastructure and materials) (ibid.). The Center offers courses from the bachelor's degree level to doctorate courses, with assignments and corrected exercises or practical exercises used as primary support for provided handouts. Learning is validated through examinations during face-to-face meetings.

However, an increasing number of universities is deciding to implement distance teaching because the University of Antananarivo is currently able to welcome only 10,000 students among the 46,325 candidates for the first year.³⁾ "Making distance training and educational digitalization tools for accessibility and equality" in higher education is one of the programs decided upon by the three ministries in charge of education, that is, the Ministry of National Education, the Ministry of Technical Education and Professional Training, and the Ministry of Higher Education and Scientific Research, during the development of the ESP (MEN et al., 2017, p. 231). The policy paper recommends developing various models for the implementation of digital resources, specifically developing the autonomy of students who need to spend a third of their learning time using the Internet. It also mentions the need to roll out strategic measures to ensure the quality of education provided such as reinforcement of digital competencies of students and teachers and the availability of appropriate infrastructure. Internet connection in universities has been taken care of by the Research and Education Network for Academic and Learning Activities (iRENALA) since 2012, with reinforced agreement protocols and increased Internet speed in 2019, enabling students to benefit from WiFi connection within their universities.

Each university setting, in particular the ENS, has acquired video projectors for the teachers, and special classrooms were constructed to allow students to do research. Furthermore, many of the students have purchased a computer or touchscreen phone on their own. A teaching module centered on students' introduction to Information Technology (IT)

became mandatory for first-year students to reduce inequalities and encourage students' personal research. Students may come to the university at any time to sign in, and each department has implemented a working mode trending toward digitalization of teaching: usage of text or video storage platforms, for example. Students were also introduced to software design and its usage for teaching simulation and internships, which required face-to-face teaching. In spite of these modest efforts, the first lockdown during the health crisis left the university population in distress because they were prepared for enriched face-to-face classes, not a switch to fully remote teaching. The next section details the methodology to investigate such changes and their relationship to students' life and education.

5. Research methodology

Participant observation and a questionnaire survey followed by an interview were used. The methodology is detailed below.

5.1. Participant observation

Participant observation was carried out starting in September 2020 at the beginning of the academic year until August 2021, the end of the academic year for 2019–2020. One of the authors worked as an instructor at the university and detailed her observations of what prompted emergency distance learning and how different levels of higher education played a role in its implementation including how she managed her own class during the pandemic.

5.2. Questionnaire survey and interview

A questionnaire survey was conducted online with students from the mathematics, physics/chemistry, and English departments in late July and at the beginning of August 2021. This month was chosen because it was before the publication of examination results and students still went to the university daily. Three departments known to implement distance learning were selected, and the sample population comprised students in their final two years of undergraduate and in master's programs. A total of 38 students answered the questionnaire (see Table 2).

Table 2. Participants' details

Course	Department	Questionnaires			Interviews		
		Female	Male	Total	Female	Male	Total
Master's	Mathematics	4	4	8	3	4	7
	Physics and chemistry	2	8	10	0	6	6
Undergraduate	English	3	2	5	3	0	3
	Mathematics	0	2	2	0	0	0
	Physics and chemistry	3	10	13	3	5	8
Total		12	26	38	9	15	24

Source: Created by the authors based on the questionnaires

Among the students who completed the questionnaires, 24 agreed to have an interview. Each student was interviewed for between 30 and 60 minutes. The characteristics of the students are provided in Appendix 1. Semi-structured interviews were conducted online using Zoom. The Internet expenses of all students were borne by the researchers to avoid excluding those who do not have easy Internet access. Questions were asked to prompt discussion on how the students were living with the COVID-19 crisis, how they experienced distance learning, and what they gained and lost in terms of education during those days. They were asked to reflect on the changes that occurred before and during the periods of lockdown.

6. Research results

6.1. Changes at the university level

6.1.1. ENS's response to the need to complete the academic year

The first lockdown took Malagasy universities by surprise, and they were little prepared to fully switch to distance teaching. No clear direction was given by the ministry because the resources of each university setting are different, which

made implementation of common measures impossible. As for the specific case of the ENS, the first lockdown occurred when classes had resumed after several weeks of students' protest and about two months before the planned end of the semester. Teachers were finishing their courses and preparing for final examinations. Some of them conducted individual initiatives to continue teaching and maintain the momentum, whereas, for others with fewer resources or managing health issues, the lockdown led to a complete interruption of their pedagogical activities.

As soon as the green light to resume schooling was given by the President of the Republic, the conference of university presidents (COPRIES) decided to start teaching again: one month to finish the semester before the new academic year. Because the schedule was fixed, each setting was responsible to meet the aims of the university year. The same principle was generally applied for the second lockdown.

6.1.2. Instructors' implementation of distance learning

During the first lockdown, the university of Antananarivo, including the ENS, asked their academic personnel to use a digital workspace named "Virtual University of Ambohitsaina"⁴⁾ to store their lectures and provide activities to students, but very few teachers used it. Indeed, those with a high-speed Internet connection at home and the skills to provide online courses had already started to communicate with their students using more generalized tools (Google, Zoom, Messenger, Facebook groups, etc.). They did not want to test a different communication channel. Training on the usage of these platforms was initiated, but since it took place during the lockdown, very few teachers participated. Currently, the platforms are no longer functional.

For teachers who worked toward continuity, this first period was difficult. They had to determine ways to communicate with their students and change their teaching content to adjust to the distancing. They needed to design and email extremely precise working documents and anticipate their students' challenges. This gave some teachers the opportunity to become familiar with Messenger, the most affordable tool for students with network issues, to submit their activities and assignments. In general, this period introduced them to distance training.

After the first lockdown, medically vulnerable teachers did not come to their face-to-face sessions. They organized themselves to provide lectures from their homes through Zoom for students gathered in the classroom. The Internet speed of the ENS was at first insufficient, and the sessions often ended roughly, leading the students to contribute to Internet costs. However, the students were not all engaged in the same way, and sessions were often delayed or postponed; this impacted the teachers' scheduling and the content they provided when they were expected to rush to finish the semester in three months, which was likely to cause some learning gaps among the students.

As the ENS is a teacher training setting, some modules in the final year of undergraduate or master are difficult to teach remotely and exams were also an issue. Such teaching modules include didactical practical exercises, course simulations, and observation and practical internships at secondary schools.

Didactical practical exercises and teaching simulations are not presentations but situations during which the student manages practical work or "teaches" other students who are roleplaying as students in the class. Each performance is discussed afterward from the perspectives of its academic content as well as the teacher's relationship with students, questioning, circulation around the classroom, follow-up of the pseudo-students' notebooks, usage of the blackboard, relevant usage of resources, and so on. As the rooms are not equipped with video cameras to record the appropriate angles, a single computer was placed on top of a stool over a table to record the scene; it is often difficult for the teacher to appreciate the entirety of the didactical practical exercise or simulation remotely.

The students had to wait for classes to resume to perform their observation and practical internship at secondary schools. The duration of these internships was cut in half in order to align with the university calendar. During the second lockdown, teachers and students were better prepared for continuity. The courses could continue through documents sent via email or Messenger, or uploaded to already familiar platforms (Drive, etc.), and distance teaching also allowed for the strengthening of students' team spirit as they were engaged in their Messenger group and relayed information between themselves.

The teachers' intervention on Zoom helped to alleviate disadvantages to students with few financial and material resources. As the resumption occurred a few months before the secondary school exams, the final year students in license or master's degree programs were sent to shortened internships before they completed their simulation sessions, whereas usually, the success of simulation exams is a prerequisite for starting internships; this disruption has caused issues.

In a nutshell, distance teaching has brought about many changes: It supported the reinforcement of teachers' digital and didactical skills, and it has led them to invent new arrangements and to renew their teaching methods. They had to compress their courses to adjust the material to fit the available time. However, the internship assessments are not in favor of the changes brought in by the lockdowns due to the insufficient time allocated to allow teachers to carry out multiple follow-ups when the preparation was insufficient because of the postponed simulations.

6.2. Changes at the student level

6.2.1. Students' living environment

A great majority of the participants are from regions outside Analamanga, the capital city region. Most of them went back to their parents' homes during the lockdowns (see Appendix 1). Even under normal circumstances, there are students who do not have access to a computer for personal use. Here is how Kajy, a male student from the physics and chemistry department, reported his computer and internet access: "I buy connection packs on my phone only when I have to read my emails or send assignments. I borrow a computer from my cousin. When she is working, I do not have a computer to use. I have to wait for her to finish or go to a friend's place." Although most students have a smartphone, mobile coverage and electricity turned out to be problems for some when they went back to their parents' home for lockdown. Table 3 shows the students' access to devices and Internet connection under normal circumstances.

Table 3. Students' access to Internet connection and devices

Type of access	Computer	Tablet	Smartphone	Home Internet	Mobile Internet
For personal use	22	1	36	0	25
Shared access	10	2	1	4	0
No access	5	32	0	32	12
N/A	1	3	1	2	1
Total	38	38	38	38	38

Source: Calculated by authors based on survey data

Internet capacity largely varies, from 50MB (some mobile companies start at 10MB per purchase) to around 20GB per month; a minority have more than 75GB. Most participants (27/38) spend 10.000 Ar (USD2.5) or less per month, while a minority (9/38) spend more than 10.000 Ar, including two students who spend more than 50.000 Ar (USD12.5) per month (public university students receive between 24,000 Ar and 40,000 Ar in scholarships per month depending on their level). This spending increased for most students during the lockdown and decreased again once the lockdown ended. Among those who saw Internet access decrease are those who live in other regions where there is insufficient mobile coverage to allow for a useable Internet connection.

Fetra, for example, returned to the Bongolava Region, a region neighboring the capital city region. He relied on a friend to call him to check his email so that he could go somewhere with an Internet connection for a while before going back home to help his parents with their agricultural work. Even so, there are times when his connection was insufficient to read emails. During those times, he asked his friend to send screenshots of the assignments using social media, which was easier to access. Seta, from the Alaotra Mangoro Region, lives far away in the countryside and does not have any access to the Internet at all. He regularly has to travel four kilometers where he can access the Internet for a while, finishing his assignment there before going back to his parents' home. Those students are not necessarily poor. Most of their parents have the resources necessary to send them to the university and pay for their rent and food.

6.2.2. Different forms of distance learning and students' challenges

The interview showed that distance education took several forms depending on the department and sometimes between levels. For students in the physics/chemistry and mathematics departments, the courses were delivered synchronously using Zoom, where students came to the university and the instructors stayed at home. For the English department, a mostly asynchronous approach was taken to provide the courses using Moodle⁵, a learning management system. Not all courses were provided online but surprisingly, for the physics/chemistry and mathematics departments, one practical subject, "teaching simulation," was among those provided online. For all three departments, in addition, social media such as Facebook groups and Facebook messenger were used for communication and coordination between students and

between students and teachers. Within the physics/chemistry and mathematics departments, email was mostly used at the graduate level for assignment submission and feedback, while undergraduate students reported that they rarely used email.

Imitating the face-to-face classroom environment

One of the biggest challenges the students had to face was the effort of the instructors to mimic the classroom environment online. Some students taking the synchronous classes did not find much change in the way the courses were given. The only difference was that the instructors were not in class. Diary, a third-year student in the physics/chemistry department, reported how she experienced distance learning as follows.

I did not see much change between online and face-to-face. We [students] were all in class and the professor was at home providing the lecture through Zoom (...) Usually, we had a lecture, followed by a seminar in which an assignment was provided that is checked by the professor on the spot (...) it was a little hard because we had to show her the board and moving the computer to the right position was difficult. (...) Also, just like in face-to-face, as with a blackboard, we copy what is written on the screen (...) we were not provided with handouts, we just copied.

This situation is probably because the subject in question is a practical one. However, the same effort to reproduce the face-to-face classroom environment was also seen at the beginning of asynchronous classrooms. Students were first asked to meet with the professors online at a particular time for their assignments but eventually, it was not easy for each student to attend class from home. While some students could freely use mobile Internet connection, many had limited data and had to go to an Internet café to take the course. Moreover, technical issues on the instructor's part also affected students' ability to take the course in a synchronous way. Tefy reported, "we agreed with the professor to start at ten, then I went to the Internet café but he/she showed up late, so I had to pay more than what I thought I would."

Facing distance learning as a group

Students who took the synchronous classes could face their first distance education as a group, which helped them adapt by learning from one another. As a result, they did not feel a big learning curve moving from face-to-face to distance learning. Moreover, undergraduate students reported receiving more support from the instructors than did the master's students. Unlike undergraduate students, graduate students set up the computer to use in class themselves and experienced difficulties ranging from the instability of the Internet provided by the university and the need to spend money themselves for a better Internet connection to hardship due to the lack of knowledge when the ones who usually set up the computer were absent from class. However, compared to those who took asynchronous classes, they generally seemed to have a positive experience. Diary, a female undergraduate student from the physics/chemistry department tells her experience as follows.

Internet was a problem only in the beginning because we used the school's Internet, which was unstable. Later, one professor brought an Internet modem that we used (...) I personally have never used Zoom before. The professor had an assistant who took care of the technical side. When she could not see what was on the board, the assistant checked and told her whether what was on the board was OK or not.

For students who had to take the asynchronous classes, they had to face distance learning individually. Apart from IT that they had learned in their early years at the university, some tutorials were provided before they started their courses. While they reported that there was no real problem in using the tools, issues were mostly linked to the fact that in asynchronous learning, the instructors could give a bigger amount of content, which turned out to be a burden when they started to resume face-to-face classes. While most students who took the synchronous classes found the content insufficient, those who took the asynchronous ones affirmed that the load was heavier.

The change in human connection

The shift to distance learning also changed the way students interacted with their teachers. While it is generally easy for students to communicate with their instructors face to face, this became almost impossible during distance classes. The instructors' email addresses were available to them, and discussion groups were established on social media, but students

prefer consulting with their classmates first and contacting the instructors on extremely rare occasions. Some of them explained that that was because the instructors took time to respond to their queries but others simply doubted the appropriateness of asking questions. Miora, a master's student in mathematics, explained her experience as follows.

We use Facebook with the teachers to arrange the timetables or send files (...) I never asked questions in emails. I used to ask questions face to face. It is easier, I think. I don't ask questions because I think that the teacher may already think that we understand the materials. They may have put much effort into making them easy to get (...) The materials provided by the teachers are done in such a way that it is easy to understand. They know how to make the materials easy and the lessons are clear.

Friends proved to be valuable assets, especially during asynchronous distance learning. In the early lockdown, students were not permitted to go to the university, and most of them went back to their hometowns. For physics/chemistry and mathematics master's students, assignments were given through email exchanges. Though not all students felt isolated, some heavily relied on their friends to get their homework delivered. Students who have a person to rely on are at an advantage, and students who are married reported that they were especially happy with the situation. While it is true that this might be due to the freedom to be with their families, Fitia, a female student from mathematics, for instance, reported that her husband helped her a lot in understanding the contents of the assignments.

On the other hand, for students who are not married and not living alone, home does not necessarily provide a good environment for studying. Regardless of where they live, some felt obligated to do chores or work in the field. Some affirmed that their parents would not understand if they did not work in the field with them, which leaves little time for their studies.

Enriched learning setting

Students who took the asynchronous classes found it harder to study online because there are more materials to read and understand and fewer explanations than usual. This difficulty increased when they went back to the university and had blended learning, where they met with the professors during the day and did their assignments online at home. Tefy highlighted that the professors should ask the students about their possibilities before implementing such learning styles. She said one of her friends could not stay up too late at night but was afraid the professors "would ask why she/he could not finish while all the others could."

On the other hand, students taking the synchronous classes see just enough information, as they could take snapshots of the presentations that would help them review the material. They affirmed that documents from instructors are usually difficult to obtain and many courses still have teacher-centered lectures as a foundation. They also found that their time was used efficiently as the professors were never late. When the professors come to the university, they are busy and always have a couple of things to do before classes. "It feels more efficient. A two-hour class really takes two hours. The contents are also complete," one participant, Joda, noted. Other students think that the explanation is rushed, as the information is compressed. Those students affirmed they had to do more research than usual on their own to complement the content provided, which they found beneficial.

For other students such as Laza, distance learning helped considerably, as 2021 was his eighth year at the university, although he has never officially repeated a year. This was in most part due to the unstable university calendar owing to different issues including strikes on the part of the teachers and students. Paradoxically, as reported by the students who followed asynchronous distance learning, their courses continued throughout the COVID-19 crisis but only stopped during the teaching personnel's strike.

6.2.3. Education and work: Vital necessities

Regardless of living area, students under the responsibility of their parents feel the need to work to help their families. Students who lived in the capital city, such as Tia, needed to include chores in her daily schedule. Dera, who had to go back to his parents' home in the Itasy region, describes his life as follows.

I went back to Itasy during the lockdown. My parents called me and said "since there is no course, come back, we have work to do here". I helped my parents to work the land. It is not really about the coronavirus but about the work that needs to be done. I worked more in the field than for university assignments during the lockdown. There were times I was tired from the field and could not study so I went to sleep.

With the same tone, Kajy from the Alaotra-Mangoro region described the situation when he had to go back to his parents' home when COVID-19 hit. He affirmed, "We do not have time to do research at home. If you are in the village, you have to work. On the positive side, it was an occasion to get back home. My siblings also went back there so it was an opportunity to spend time together because it has been a while since we left our home to study."

The ability to mix education and work

ENS is one of the strictest institutions in terms of attendance, with tight timetables, among Malagasy universities. This does not allow students from financially weak families to work while studying. Moving online, even partially, gave certain students some flexibility in doing part-time jobs that are only available on weekdays. Hery explained how he earned a living during the COVID-19 crisis as follows.

The lockdown was actually good for me (...) people like me who are doing business, wanted it to last a little longer. I buy staple products and send them to rural areas. People could not move but products could. That is why my business flourished during those times. People did not have money during the lockdown but I did. Even later when we had class, I could leave the university for a while to do my business and get back as if I were always there (...) I come from the northeastern part of Madagascar. I got some money from my parents when I was in my first year but after that, I had to work to sustain my education at the university. I live on what I earn, my education, and everything. I was teaching at a private school before but it is impossible with our schedule. The headteacher needs you to stay at school longer while you face pressure to come every day to the university. Plus, you do not earn much from teaching, so I quit. This selling job is easier when we have to study at the same time.

Ironically, as a teacher training student, he did not find the teacher's job rewarding but he had to work to be able to continue his studies. Before the pandemic, he received warnings from the university because he had missed class several times. From the outside, it seemed that he was not serious with his studies, but if he did not work, he would be in serious financial difficulty. The monthly stipend provided by the university is insufficient and is often late by several months. There are four such students from outside of the capital city who reported that they do not receive any financial help from their parents, and three of them (including Hery) actually work to financially support their families.

7. Discussion

The main objective of this study is to understand how emergency distance teaching implemented during the COVID-19 pandemic brought changes in the university life of students of the ENS, with a focus on disparity. At the university level, the academic year had to be rushed. Due to the lack of training, the tools that were provided by the central administration turned out to be unusable, and teachers turned to tools that are more familiar to them. Teachers had to adjust their content, not only making the materials teachable online but also compressing them to fit into the scheduled time. Nevertheless, practical subjects proved to be difficult to manage, especially regarding assessments. This led to a difficult setting where online teaching had to be adapted to teach the content of face-to-face materials.

Two methods were generally used to continue the teaching without compromising the health of the teachers, most of whom are considered vulnerable. While some departments used videoconferencing with all students coming to the university and the teachers at home, others used asynchronous methods such as Moodle to teach, with both students and teachers at home. On one hand, the implementation of such distance learning reinforced the teachers' digital and didactical skills and the acquisition of new ways of teaching in a constrained environment. On the other hand, students responded differently according to the mode of teaching, their background, and their environments.

7.1. Difficult to shift time and space constraints

With distance learning, the constraints of time and space shifted to the amount of work students and teachers had to provide, which is in line with Tricot (2021). The result was a better availability of learning materials, which was of help for some students, mostly those who had synchronous learning. For the others, it sometimes presented a burden due to the lack of live explanation compared to the increase in the volume of contents. In addition, with limited access to a personal computer and stable Internet connection, time constraints remained, especially for students who had to go to the university for videoconferencing.

As the burden of education changes, methods should also follow in order to maintain the same amount of effort as is put forth for face-to-face classes. The nature of subjects taught at ENS, however, requires a certain amount of face-to-face learning to prepare students to work as teachers at secondary schools, which will not implement distance education in the near future. This double constraint of contents and means are leading to a conflicting mix of methodology.

7.2. Conflicting teaching methodologies

When using synchronous approaches, it seems tempting to try to mimic face-to-face learning. The students found that the content was the same, except that there was no teacher. They still copied from the screen just as how they would do in face-to-face settings. Others even compared the class to watching a movie, occasionally asking questions at the end. They still used a blackboard and chalk while working online. As discussed earlier, distance learning eases distance and time with a cost, but this cost is higher when the objective is to create a face-to-face environment out of an online setting. On the contrary, it would be more beneficial to consider online education on its own merit, without thinking of going back to face-to-face learning.

It is, however, difficult for an institution such as ENS to become completely immersed in distance education, as the students they are training will be teaching face to face at secondary schools. As long as distance learning is not implemented in secondary education, it would seem counterintuitive to switch to distance education with different methods of learning, teaching, and learning to teach. Such conflicting settings helped reveal who are the most vulnerable among the students and who can adapt.

7.3. Identifying and listening to the most vulnerable

While professors at some departments made efforts to hear the voices of the students before starting distance learning, some seemed to have no choice but to expect that the students would do what they could do to try to follow along. Even when students' voices are heard, the majority normally sets the trend. Voices such as Tefy's friend's (who risked being left behind because of health issues) that are different from the majority, despite their personal constraints, normally remain unheard. In a society where selection starts in primary school with national examinations, few students make it to upper secondary school, and fewer manage to go on to higher education. The strongest have always benefited from the system. When the system becomes more constrained, it is easier to find the most vulnerable within those who made it through the selections.

It might be expected to see the strongest become stronger when the same constraints apply to everyone, in line with Cacault et al. (2021). The issue does not seem to stem from academic achievement itself but rather the students' living environment and socioeconomic background. It is common for students who do not have to work or do chores to have sufficient time to study, and the rest depends on their maturity and self-discipline, also pointed out by Guillemet (2014). However, other students have to do different chores, ranging from housework to work in the field. Such constraints stem from students' sense of responsibility, which is considered maturity in the Malagasy context. Some students indeed worked to the point they were not able to perform their academic duties once they got home, but there are also students who desperately need to work to survive. For universities, most of the time, such students are considered not serious or immature, but their education highly depends on their economic abilities to sustain themselves.

Entering public universities, especially ENS, is highly competitive because of the limited places available. It is natural to think that students who enter such schools are the elites. After all, they managed to enter a public university. However, disparities exist between them that is rarely acknowledged given their achievements. With the COVID-19 crisis, such issues became apparent. In Madagascar, disability issues and the students' abilities to follow the course are rarely discussed as such students are normally shut out at an early level. In this case study, when students cannot follow the courses, they hesitate to come out and assert themselves for fear of not conforming to the classes' pace. Some students are afraid their questions are not relevant and refrain from asking them. This is more apparently seen in students' hesitation to send an email to ask about points they missed in class. This pandemic also showed that there might be a need to rethink the relationship between students and teachers in the context of Malagasy universities.

8. Conclusion

The emergency nature of the COVID-19 situation compelled the university and its departments to find ways to continue offering education accounting for the resources they had and students' situations. As COVID-19 brought constraints of space, distance learning and teaching was the obvious solution, and it was undertaken by the university soon after the lockdown started. With such constraints came a new mix of methodologies, adapting content usually taught face to face to an online setting. Such a setting highlighted the disparities between students. Identifying such changes in constraints permitted the understanding that the view of who is vulnerable tends to be biased when all students are thought to be equal. While everyone is expected to spend the same amount of time learning at home, some had to split that time between chores, working in the field, and lastly, education. Some of them are required to both work and study. This has less to do with lack of maturity but rather is a result of personal and familial constraints.

As the burden of education shifts from place and time to the quantity of work, methods should also follow in order to keep the same amount of effort expended as is required in face-to-face teaching. This is, however, difficult when teaching contents are geared toward training students for face-to-face teaching; the same is likely true in other practical education fields. Finding ways to help overcome this complex situation could be a key to advancing distance learning at institutions such as the ENS. At the same time, the COVID-19 pandemic continues, and its sequels are still very present. This year, delays caused by education disruptions are bringing two cohorts of new students to enter universities at the same time. The need for distance learning is becoming more urgent due to the limited capacity of each institution.

This study helps to explain how emergency distance learning brought changes into ENS students' lives. During the COVID-19 crisis, most changes in higher education have been seen from the viewpoint of teaching and learning, but the case of ENS shows that they are intrinsically linked to "living" and, to some extent, "working" as well. Future research foregrounding the "life" and "work" of university students would help researchers to better understand how they learn during crises.

Acknowledgments

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Notes

- 1) <https://www.latribune.fr/actualites/economie/international/20141120trib3de2cec91/les-africains-ont-un-meilleur-acces-aux-telephones-portables-qu-a-l-eau-courante.html>
- 2) <https://www.journaldunet.com/patrimoine/finances-personnelles/1208753-pays-pauvres-classement-2021/1208807-madagascar-1612969898.amhtml/>
- 3) <https://actu.orange.mg/enseignement-superieur-il-ny-aura-pas-dannee-universitaire-superposee/>
- 4) <http://www.uv.univ-antananarivo.mg/course/index.php?lang=en>
- 5) <https://moodle.org>

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Appendix 1. Participants details

	Course	Field	Name	Gender	Age	Origin	Normal residence	Lockdown residence	Part-time job
Questionnaire only	Master	Mathematics	Fitia	Female	27	Other regions	With spouse	With spouse	No
		Physics and Chemistry	Fara	Female	24	Analamanga	With parents	With parents	N/A
			Hanta	Female	25	Other regions	Alone	With parents	Yes
			Jao	Male	24	N/A	Alone	With parents	Yes
			Maro	Male	24	Other regions	Alone	With parents	N/A
	Undergraduate	English	Andy	Male	21	Analamanga	With parents	With parents	No
			Rabe	Male	19	Other regions	With parents	With parents	N/A
		Mathematics	Njaka	Male	25	Analamanga	With parents	With parents	N/A
			Tovo	Male	25	Other regions	With parents	With parents	Yes
		Physics and Chemistry	Fidy	Male	21	Analamanga	With parents	With parents	No
			Naina	Male	35	Other regions	With siblings	With siblings	Yes
			Rado	Male	22	Other regions	With siblings	With parents	Yes
			Rija	Male	22	Analamanga	With parents	With parents	No
			Tody	Male	22	Other regions	With siblings	With parents	Yes
Questionnaire and interview	Master	Mathematics	Dera	Male	23	Other regions	Alone	With parents	No
			Hery	Male	25	Other regions	With siblings	With siblings	Yes
			Kolo	Male	24	Other regions	N/A	With parents	Yes
			Manda	Male	22	Other regions	Alone	With parents	Yes
			Miora	Female	22	Analamanga	With siblings	With siblings	Yes
			Rova	Female	23	Analamanga	With parents	With parents	No
			Soary	Female	N/A	Analamanga	With parents	With parents	Yes
		Physics and Chemistry	Dafy	Male	25	Analamanga	Other	With parents	Yes
			Fetra	Male	25	Other regions	Other	With parents	No
			Kajy	Male	24	Other regions	With parents	With parents	Yes
			Laza	Male	25	Analamanga	Alone	With parents	Yes
			Mamy	Male	27	Other regions	With spouse	With spouse	Yes
			Mino	Male	25	Analamanga	N/A	N/A	No
	Undergraduate	English	Dany	Female	22	Other regions	With parents	With parents	No
			Irina	Female	21	Analamanga	With parents	With parents	No
			Tefy	Female	21	Analamanga	With parents	With parents	No
		Physics and Chemistry	Diary	Female	22	Analamanga	Other	With parents	Yes
			Joda	Female	24	Analamanga	With parents	With parents	Yes
			Oly	Male	22	Other regions	Other	With parents	No
			Rivo	Male	22	Analamanga	With parents	With parents	No
			Seta	Male	25	Other regions	Alone	Alone	No
			Tia	Female	20	Analamanga	Alone	With parents	No
			Trimo	Male	24	Other regions	Alone	With parents	Yes
			Zina	Male	26	Other regions	With siblings	With siblings	Yes

Source: Created by the authors based on the questionnaire and interview data

共同・協働研究を軸としたアフリカ教育研究の展開 —コロナ禍の「逆境」を乗り越えるための挑戦の記録—

アフリカ教育学会第28回大会実行委員会

1. はじめに

ここでは、本特集の執筆陣の一部が参加した、2021年10月9日(土)にアフリカ教育学会第28回大会にて実施された特別セッション:「共同・協働研究を軸としたアフリカ教育研究の展開—コロナ禍の「逆境」を乗り越えるための挑戦の記録—」における座談会と、その際に行われた登壇者による特集論文の概要の説明と共同研究に対する所感、ならびに同大会参加者を交えた相互交流の記録を示す。

上記の特別セッションのプログラムは表1のとおりである。

表1 アフリカ教育学会第28回大会の特別セッションのプログラム

<p>特別セッション</p> <p style="text-align: center;">共同・協働研究を軸としたアフリカ教育研究の展開 —コロナ禍の「逆境」を乗り越えるための挑戦の記録—</p> <p>日時: 2021年10月9日(土) 15時10分~17時00分 場所: オンライン (Zoom) 言語: 日本語/英語 話題提供者: 坂上勝基 (神戸大学)、牧貴愛 (広島大学)、川口純 (筑波大学)、 大場麻代 (帝京大学)、小川未空 (大阪大学)、日下部達哉 (広島大学)、 ファンテンナ・リアソア・アンドリアリニアイ (大阪大学) 進行: 坂口真康 (兵庫教育大学) 趣旨: 『アフリカ教育研究』第12号の特集(「コロナ禍における比較国際教育研究の新展開」)に投稿予定の7つの論文に携わるメンバーを交えて、同特集論文の冒頭に収録することを念頭に置いた「座談会」を実施する(録音・録画予定)。座談会では、共同・協働研究を軸としたアフリカ教育研究を展開する中で考えたことや、コロナ禍の「逆境」を乗り越えるための具体的な方策について議論する。座談会に先立ち、冒頭でそれぞれの特集論文の概要を説明する時間を設ける。座談会の最後には、第28回大会の参加者も交えた相互交流により、共同・協働研究を軸としたアフリカ教育研究の展開の可能性について議論する。</p> <p>Special Session Expanding African Educational Research through Joint/Collaborative Studies: Records of Challenges for Overcoming “Adversities” under the COVID-19 Pandemic Date: October 9, 2021 (Sat) 15:10~17:00 (JST) Venue: Online (Zoom) Languages: Japanese / English Presenters: Katsuki Sakaue (Kobe University), Takayoshi Maki (Hiroshima University), Jun Kawaguchi (University of Tsukuba), Asayo Ohba (Teikyo University), Miku Ogawa (Osaka University), Tatsuya Kusakabe (Hiroshima University), Fanantenana Rianasoa Andriariniaina (Osaka University) Moderator: Masayasu Sakaguchi (Hyogo University of Teacher Education) Rationale: In this special session, a discussion meeting with the members who are planning on submitting papers (seven in total) to the Africa Educational Research Journal Vol.12 (Special Issue: Advancing Comparative and International Education Research in the Era of COVID-19 Global Pandemic) will be held (this meeting will</p>
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be recorded and is planned to be inserted in the special issue of the above journal). In the meeting, the topics such as what it means to expand African educational research through joint/collaborative studies and specific strategies for overcoming “adversities” under the COVID-19 pandemic will be discussed. Before the meeting, each speaker will explain briefly about each article in the special issue of the above journal, and after the meeting, interactions with the participants of the 28th JSAER Conference will be held in order to discuss possibilities for expanding African educational research through joint/collaborative studies.

＊アフリカ教育学会第 28 回大会プログラム・発表要旨集録（p.6）の内容を修正して掲載

次頁以降に、上記の特別セッションの記録（再構成版）を収録する。本記録は、特別セッション中に録音されたデータをもとに作成したトランスクリプトについて、内容を損なわない形で文章を大幅に加筆・修正しつつ再構成したものである（〔 〕内は補足情報である）。その際、英語による発言は日本語で訳出した。なお、同特別セッションの再構成版の記録の中の登場人物と略称の一覧は、表 2 のとおりである。

表 2 特別セッションの再構成版の記録の中の登場人物と略称の一覧（敬称略、登場順）

進 行：坂口（坂口真康、兵庫教育大学）＊本記録の編集担当
登壇者：坂上（坂上勝基、神戸大学）
牧（牧貴愛、広島大学）
川口（川口純、筑波大学）
大場（大場麻代、帝京大学）
小川（未）（小川未空、大阪大学）
日下部（日下部達哉、広島大学）
リナ（ファナンテナナ・リアナスア・アンドリアリニアイナ、大阪大学）
発言者：西村（西村幹子、国際基督教大学）
小川（啓）（小川啓一、神戸大学）
澤村（澤村信英、大阪大学）

2. アフリカ教育学会第 28 回大会特別セッションの再構成版の記録

2.1. 各特集論文の共同研究の概要と登壇者の所感

表 3 各特集論文の共同研究の概要と登壇者の所感の一覧

坂上 （特集論文① ＊特集論文② にも参加）	特集論文①では、世界銀行の高頻度電話調査データを用いて、ケニア、ウガンダ、マラウイの 3 カ国の比較を通じ、コロナ禍で学校閉鎖中の学習活動へのアクセスにおける格差を検討。その際、ウガンダをフィールドに様々な手法の実証研究を実施してきた個人的な経験を活用。量的分析、政策文書・援助機関の報告書等の質的分析で分担しつつ、高頻度で収集されたデータを使っているのに「低頻度の、でも高密度」な打ち合わせを重ねながら研究活動を推進。コロナ禍だからこそ実現した共同研究という認識。
牧 （特集論文②）	特集論文②では、中所得国入りを目指す国々の教育普遍化と格差の未来というテーマで、タイ、ケニア、ウガンダという異なる経済成長段階の 3 カ国の比較に挑戦。国家政策文書を主軸とした分析と統計分析を組み合わせて、「重層的」／「立体的」に研究を推進（ベレディの比較の 4 段階研究法を参照）。期待感を抱きながら研究を推進するも比較の難しさ（訪問したことがない国を想像することの困難）も実感。グループで Zoom を用いて、定期的に打ち合わせを実施。
川口 （特集論文③）	特集論文③として、マラウイ、エチオピア、ケニアを対象に、障害児教育を中心としたインクルーシブ教育の研究を計画。教育省に勤める政策担当者へのインタビュー調査（オンライン）を実施したが、実査の段階でケニアの調査が「調査許可の関連で」困難であったことからマラウイとエチオピアの 2 カ国比較に変更。現在までに取り組んできた学校

	現場における研究の成果と教育省における調査の結果について、「奮闘ぶりを照らし合わせ」た比較を試行錯誤しながら実施。
小川（未） （特集論文④） *特集論文① と特集論文② にも参加）	特集論文④では、南アフリカ、ケニア、マダガスカルの中等教育のナショナル・カリキュラムと修了資格試験を、「公正（equity）」、「平等（equality）」、「等価（parity）」概念に着目して比較検討。それぞれが専門とする地域を個別に分析しつつ、「格差」について理論的観点から全体を見渡す役割の共著者も。メールや Zoom での交流を高い頻度で実施しながら共同研究を進めてきたという印象。
大場 （特集論文⑤） *特集論文③ にも参加）	特集論文⑤では、当初ケニア、ザンビア、インドの 3 カ国比較を通じた、低学費私立学校に関する研究を計画。しかし Zoom による会議を重ねる中で、先行研究の分量が膨大になることが判明したことからそれらの精査を行う論文へと変更。結果的に 3 カ国の比較ではなく、「先行研究やそのレビュー論文を批判的にレビューする内容」に。現在の議論の潮流を再検討。各執筆者が利用できる資源を最大限活用して作業ができることに共同研究の強みを実感。
日下部 （特集論文⑥）	特集論文⑥では、インドネシアにおける宗教教育の格差に焦点を当てた共同研究を実施。学校とは別に宗教集団があることに着目しつつ、「公教育制度をコミュニティが補完するようなシステム」を探索（その中で「ライセンス概念」も検討）。共同研究者（指導学生）が修士論文の段階で収集したデータをもとに議論を展開（結果的に指導学生の博士論文を強化している状態）。KPI（Key Performance Index）を見据えた「論文の生産体制」の観点からの共著論文の重要性を指摘。
リナ （特集論文⑦） *特集論文④ にも助言者として参加）	特集論文⑦では、マダガスカルの大学における緊急時の遠隔教育による変化（コロナ禍の格差）を探索する共同研究を実施。現地調査は、マダガスカルの大学で勤める共著者の 1 人が担当。マダガスカルの大学教育のデジタル化などの変化をもたらしたボローニャ・プロセスにも着目しつつ、ロックダウン中（後）において教員がいかに遠隔教育に取り組んだのかを探索。現地調査に加えて、Google Form を用いたウェブ調査や Zoom を用いたインタビュー調査（学生対象）も実施。

2.2. 座談会

坂口 共同・協働研究を軸としたアフリカ教育研究を実施することってというのが、どういうことなのかということや、先生方のお話の中で出ていた、比較をするとか。あるいは、1 国であっても、色々な研究者と一緒に研究をするっていう時の画期的な点、難しかった点。牧先生のお話にもあったんですけど、それぞれ専門が元々ある中で、今回あえて比較研究として 1 つの論文にまとめるときに、それぞれの専門地域であるという以上の意義っていうのを、皆さんの研究でどう見出されたのかっていうことであったり。あと、比較という意味では、冒頭の坂上先生がですね、調査方法が全く違う 3 名の先生方で、政策分析、量的研究、質的研究っていう、調査方法間の比較っていうんですかね。そこのアクロバティックさもあったり。あと、例えばインクルーシブと低学費学校と、テーマは同じだけど、対象が違ふときの擦り合わせというんですかね。

もっと深く突っ込めば、今回の特集論文は英語ですが、これは小川先生とリナさんも関わってくださっている論文でも話に出たところで、マダガスカルの公用語が英語じゃない時に英語の論文を書く時に、留意しないといけない点が、概念上たくさん出てくるっていうようなところが。これはもう他の皆さんの研究でも出てきたと思うんですね。共通言語として英語を使ってしまうとか、使わざるを得ない。色々表現はあると思うんですけど。そこでの難しさっていうんですかね。

あと、日下部先生のところでもお話が出ていたように、今後は研究をやりながら指導もできるようなユニットが求められてくるのではないのでしょうか。日下部先生おっしゃるとおり、KPI ってどこでも、日下部先生おっしゃるとおり、共著論文っていうのが、確かに 1 つ大きなウェイトを占めるのかなっていうときに、指導という形での共同研究っていうんですね。そういうやり方っていうのも色々議論が深められるところなのかと思います。

大場先生が出してくださった、調査許可が得られないから、本来計画していたものが進められないというのは、本当に共同研究の難しいところで。あるいは、資料研究でも、どこかの年の資料が手に入らないから、見た目のいい比較がしにくいっていう。

皆さんが、まず 1 つ目、共同・協働研究を軸にして、アフリカ教育研究された中で、これまで想定していなかったような難しい点と、逆に画期的なというか、これは、っていう点があれば、まずはその点をお話しいただければと思います。

リナさんと小川先生と坂上先生、大場先生も複数の共著論文に関わられているっていうことで、共同研究のやり方の違いっていうのを、それぞれ見られてきた中で気づいた点等ありましたら、それこそ本当に本音も含めて、色々とお話しいただければと思います。

大丈夫であれば、リナさん。何点かご発言されたいですか。これまでに従事された 2 つのグループで、共同・協働研究とは何であるのか、という点で何を見つけられましたか。

リナ 2 つを比較したとき…、私のグループでは、私たちが例えば「貧しい」や「豊か」といった言葉を用いるときに、本当は何を意味しているのかについての議論にたくさんの時間を費やしました。マダガスカル語で書いて話すときと、英語で書くときというのは、自分が何について話をしているのかと他の筆者が何について話しているのかの間にある種の食い違いがもたらされていました。例えば、私たちのグループでは、高等教育と COVID-19 について、坂口先生と一緒にのグループでは、「機会」と「結果」は本当のところ何を意味するのかについて。そのことについて理解するのに数日かかりました。「ああ、それがその概念〔の意味〕なんだ！」と。ですから、私にとって、言語というのはとても難しい点でした。

私たちがフィールドに行っていた頃、そしてフィールドに行くとき、多くの事務所を訪ねる必要があります。特にマダガスカルでは、許可を申請する必要はありませんが、フィールドに行ったときには、自分たちの調査を実施するために、何人かの人々を訪ねる必要があります。例えば、田舎の地域にいくときには、実際に町長に会う必要があります。そして、村の長に。そうしなければ、その場所で自分たちの調査を行うことができません。でも、今回は、この共同〔研究〕のおかげで、書類事務は前もって対応されていたとすることができます。とても迅速に、短い期間でデータを集めることができました。それはポジティブなことであつたと思います。また、地元の調査者と呼ぶことができる人々のインプットの違いもありました。私はその出身であつたという点で地元の調査者かも知れませんが、ときに視点が全く異なります。ですから、将来的には、より多くの地元の調査者を自分たちの調査に組み込む必要があると思います。その異なる視点を相補的に使うことが重要だと思います。

小川(末) 私は 3 つも入らせてもらっているんですけど、おそらく私だけリーダーはしていないというか、ファースト・オーサーはしていないんです。なので、私は 1 番比較しやすい立場かなっていうのがあつたので、発言させてもらいます。

ただ、私からは、すごく真面目なことというよりは、研究に向かう時の態度みたいなところが三者三様だっていうのがおもしろかったんで、そこを少しだけお話しできればと思いました。

坂上 得意とする手法の違う研究者が共同するとどうなるか、というところが入ってきました。そういう意味では私自身はこれをどのようにミックスさせていくかというのが、私のプランの中ではなかなかなかったんですけども。小川先生とか、私が全然お願いもしていないのに、私の方向性に対して、こういったレビューをしましたとかですね。澤村先生からも **Weekly Report** で、現場の声とかインプットしてくださってですね。ある意味、いい具合に 1 つの政策研究という枠組みで、量的研究と質的研究の視点というのは出てきているなというのを思いました。

Mixed methods という言葉がありますけれども、これは個人的にはですね、1 番難しいことというか。水と油のようなものをミックスするっていうのは本当に。やっぱり今回ですね、ある意味、ちょっとそれを私自身も挑戦的にこの場をお借りしてまとめる作業をして、今後の研究でもですね、どういったミックスする枠組みというのがあるかっていうのを探る機会にしたいなと思いつつ行っています。

あと、坂口先生が、さっき 3 つのデータを合わせる時に色々な苦労があるんじゃないかということで。私が今使ってる高頻度〔電話調査データ〕、想定以上にですね、なかなかデータが揃っていない。本当に 1 番重要な変数がです。格差を見るんだから階層間の差を見たいんですけど、SES の変数すらなかなか揃わないとかですね。こここのところで、すごく苦労しているというところもあります。

共同研究ということで、澤村先生、小川先生から色々突っ込んでいただきながらですね、普段そういったフィールドの研究をしてくださっている方に、量的研究の実態を調査されているような、そんな感じで。そういう点でもですね、なんかすごくいい刺激をいただいているという感じです。

大場 私は、川口先生を中心とするインクルーシブ班と、興津先生・小原先生との低額費私立学校班の2つで研究をしています。後者は3人で3年以上前から細々と始めていました。ですから、それなりに議論の積み重ねがあり、やりやすかったですね。それぞれ分担してやるのですが、私も学ぶ事だらけです。

インクルーシブ班は半年ぐらい前に共著で書くお話をいただき、そこから川口先生・利根川先生と組むようになりました。それぞれの先生とは長年色々研究をさせていただき知っていたので、非常に取り組みやすかったです。何よりも川口先生と利根川先生の明るさとエネルギー感です。モチベーションが非常に高いので、進み具合も早いです。

今回、ケニアの教育省の方にはインタビューできませんでしたが、マラウイとエチオピアの教育省の方をインタビューするにあたり、ある程度比較できる内容を抽出するのは難しかったです。先ほどの坂上先生のお話にもあったように、統一された指標のデータがないというか、それぞれの国で統計の取り方とか全然異なったりして、簡単に比較できない難しさは勉強になりました。

坂口 皆さんもそうかもしれないですけど、元々研究のグループとしての基盤があったところで、研究を進めていたってところのお話をされていて。インクルーシブっていうところでは、川口先生もっていうことだったんですけど。牧先生の場合は、今回初めてグループを組まれたメンバーっていうことですかね。その中で、先ほどの小川先生の話だと、引っ張るタイプのファースト・オーサーっていうパターンと、先ほどの日下部先生の冒頭のお話だと、指導教員っていう形で、むしろ後方支援っていうので、ファーストの人が引っ張っているところに、共同という形で、指導という形で関わっていく。そのコントラストって言うんですかね。逆に私自身は、ファーストでありながら、皆さん同じように動いていただいているっていうので。そこが対象地域の専門性とも関わるかもしれないですけど。

牧先生はファーストとしてすごく引っ張られて、逆に日下部先生はむしろ後方支援というところでの何か共同・協働研究のミソというか。何かそういうのってありますか。

日下部 知見として、コロナ禍でまとめていくってところの難しさに非常に関わっているようなところがあるかなと思っています。通常、大型科研を取るときでも、共同研究で論文を書くときも、ファーストについたら優れた脳みそが1つあるっていうことが重要だという真理があると思います。あまりセカンド、サードとかについた方にそこまでの負担がいかないような仕組みをとることが多かったと思います。方法論についても、偏りを持たせるということで、まとめた知見というものに向けてやっていこうと。しかしコロナ禍において、レビューなどを共同でやっていくという方法も自分にとっては新鮮なやり方に映りました。

その点で、1ついいなと思ったのは、大場さんがされている、システムティック・レビューと言いますか。レビューというのは、実は論文にもなり得るというか。経験的なデータでなかなかできない以上、そっちの方向を志向していくっていうのは1つ良い方法なのかなと思いました。で、国際誌なんかですね。実はレビューの論文って、あんまり日本では評価されないんですけども、国際誌では、引用もすごく稼ぐんですよね。コロナ禍においてフィールド・レビューの共同研究っていうのは、斬新というか強いというか。そういう気がいたしました。

牧 グループに入れていただいたんですけど、私もずっと1人でタイのことを細々研究してきました。今まで。それで、1人ちょっと取り残されたみたいな感じになってしまっていて。そこに、じゃあ一緒にしましょうということで、加わってくださったのが、坂上先生と小川先生だったということです。

それから、坂上先生ですね。バンコクにもしばらくいらっしゃったことがあって、タイがどんなところかっていうのをご存知で、その辺りからも非常にうまくこの3つの国を繋げていただきました。あと、統計の部分は本当にすべてお願いします、という感じで、頼りにしているのが実際のところです。小川先生には、細かな参考文献をちょっと足して欲しいとかですね。色々お願いした時には非常に細やかなインプットをいただいています。

坂口 川口先生に、ひとまず今までのお話も踏まえつつ、一言いただければと思いますが、いかがでしょう。

川口 やはり共同研究をするときに2つほど大事なポイントがあるかと思っています。1つは、比べると言ったときに、どこに軸を置くかという点がすごく大事になるかと思っています。どうしても比較の視点と言いますと

マークブレイのブレイ・キューブとかが頭に思い浮かぶんですけども。その中でどこを取るのか。全部を取るっていうのは難しいと思うんですね。それで、コロナ禍ということであれば 1 つ時間軸というのは取るべきだろうと思います。つまり、コロナの前と後で何が変わってるのかということを見るべきだろうと思います。我々のインクルーシブ教育研究で言うと、実はコロナに関係なくコロナ前からインクルードされていない子どももいたわけですね。そこの前後っていうのは見なければいけないだろうと思います。他の軸に関しても我々が見たい軸と見なければいけない軸が、それぞれあるだろうということですね。その 2 つの軸があってですね。そこを整理しながら、研究を進める。実はインタビューをする上で、その軸が見えてきたみたいないところはありました。

それと 2 点目は共同した場合の共同が、誰と共同するかと言いますか。どういった共同をするのかという点がポイントだと思います。我々の今までの共同というと、現地の人たちとの共同だったわけですね。そこは結構強かったと思います。これまでアフリカ研究者同士と一緒に研究を進めるのはそんなになかったわけです。コロナの影響ですね。こういうことを初めて実施してみたと言うことで、また新たな気づきがあったわけですけど。本当に誰とするかというのは、すごく大事なポイントだと思います。もちろん目的が遠くても良くないでしょうし、あまり近すぎても問題かもしれませんね。少しコンフリクトもあるかもしれません。なんか色々な関係があると思うんですよ。だから、ちょうど良い距離感と言いますか。ちょうど良い方とやっていくというのは大事なんだろうなと思います。

坂口 今、まさに川口先生がまとめてくださった点が、西村先生が全体 [Zoom のチャット欄] に書いてくださった質問ともかなり重複している部分かと思っています。特に、最後お話ししてくださった点は、1 つ目のなんのために誰とどのように研究するのかっていうのは重要だと思います、ということ書かれていて。グループを組まれる際に気をつけたことは何ですか、っていうところとも関わってくるかと思っています。で、コロナの「逆境」とはなんだったのかっていうところと。あとは、共同研究、誰に向けて発信するのかっていうところですね。もしみなさんの方から今の時点で何かなければ、西村先生が出してくださった質問に対するそれぞれのお考えというものをお話いただければと思うんですけど、いかがでしょうか。

2.3. アフリカ教育学会第 28 回大会参加者との相互交流

西村 ポジショナリティのところを、どういう風に考えてらっしゃるでしょうか。今、コロナ禍＝フィールドに行けないという、少し安易に片付けられているようなところがあるかと思っています。

自分を正当化するわけじゃないんですけど、私この 8 月にウガンダに行ってまいりましたし、11 月の秋休みはケニアに行く予定にしています。今だからこそできない研究っていうのもある中で、自分の安全や、学内で禁止されているといったことも考慮しなければならないと思うんですけど、フィールドの研究者が自分たちの研究に向かうポジショナリティをどう見るかっていうのは、すごく重要なだと思うんですよね。できないから別の事をするとかっていう消極的な研究の仕方、今このコロナ禍での「逆境」って、研究者としての逆境とか、そういう内向きな話じゃなくてですね。コロナ禍で何が研究すべき 이슈か、それに対して、1 人の研究者が、何ができるか、っていうところ。そこがすごく今の時代重要なんじゃないかなと思います。

そのために誰と何ができるか。さっきリナさんも言っていましたけど、現地の研究者とか、現地の先生たちが、コロナ禍で大変な思いしてる時に、自分たちでなんとかしようっていう。そういう連帯意識を生むかもしれない。日本の研究者が直接的に関わらなくても、そういう当事者のアクション・リサーチみたいな研究も、今後必要になるかもしれないと思います。

これまで我々の研究者の当事者性っていうのは、我々が行って、データを取って、ローカルな人に協力してもらって。それが研究の型だったんだけど。これが行けなくなった。行けなくなったということによって、これまでの研究の姿勢が本当に正しかったのかっていうことを振り返るっていうことも、コロナ禍が与えてくれた、ある意味のチャンスなんじゃないかなと思うんです。そのあたりのお考えはいかがでしょうか。研究者としての立ち位置について、少しお聞かせいただけたらと思います。

坂口 研究者のポジショナリティということで。むしろ元々ある研究の型っていうのが、あまりにも自明とされていたから、それを「逆境」と見てしまっているだけで。さっきもレビュー論文っていうところ話、日下部先生取り上げてくださっていましたけど。その点も含めて、コロナ禍だからできないっていう消極的なも

のだけじゃなくて、積極的なものも含めて何ができるかっていう。大切な問いを出していただきました。座談会ご参加の先生方、今の西村先生のご質問いかがですかね。

リナ 私たちが論文についてラトゥンプマララ先生に尋ねたとき、私は、学生が教授に論文について尋ねているという立場にありました。でも、実際に議論を行っていたときに、インタビューした学生の視点について、彼女から「はい。それは確かに重要ですね」と言われました。彼女はその大学の教授の立場から議論して、私は、学生の視点から見ており、相補的な視点を合わせることができました。私が協力を求めた結果、彼女も実際に楽しんでいたということがうれしかったです。それはアクシデントだったかも知れませんが、ハッピーなアクシデントだったと言うことができますと思います。

私が以前この特別セッション「アフリカ教育学会第27回大会」で発表をしたとき、自分の調査を行うためにフィールドにいる人たちの手助けを求めるといった話をした際に、西村先生から「倫理的配慮はいかがでしょうか」という反応がありました。全く同じ言い回しというわけではないですが、「あなたは自分の自宅に居ながら、全ての調査が実施されてますが、同時に人々を危険にさらしているのです」と理解していました。それが、私たちがこの調査において、他の誰かに助けを求めるのではなく、調査者間で実施することであることを配慮したことの原因になります。このような倫理的配慮というのは、そこにいる教授が政府からの指示や安全性対策について知っているということになります。ですから、この調査を実施していたときには、私たちにはそれ「倫理的配慮」が可能でした。私はそれが重要だったと思います。

日下部 おそらくこの段階というか、この苦肉の策で、何かが *establish* されるという形ではないのではないかなという風には思っているんです。苦肉の策だったんだけど、ちょっと違うことをやってみて。通常、国別で広い範囲を抑えつつ、みんなで共同研究してたっていうのを、もうちょっとユニットを細分化してみた。そうすると、他の人たちと自分の整合性を見たりとか、細かいことができた。あるいは、フィールド・レビューをできたっていうところは、すごく新しくて。我々が逆境をチャンスに変えることができた部分だろうという風に思っています。

で、もう1つはですね。ジャーナルの特集という形になるんですけども、それがコアになって、今度は国際的な流通性とかですね。もっと海外の、欧米とかで書かれている方々にも、伍するようなことができないのではないかと考えました。強固なネットワークみたいな形で、国際流通性を高めることができるコアができたというようなことは、非常に強いんじゃないかなと思います。英文で書きますけれども。これを発展させて、じゃあ *SCI* [Science Citation Index] 論文出そうとかですね。そういうダイレクションを持つことも可能になってくるわけですね。そういう意味では、ただ我々が苦肉の策で、ちょっと共同で、「ごまかしましょう」って言ったわけではなくて、そういう1つの *seeds, asset* としてもつことができたということですね。大きな経験蓄積だったのではないかなという風に思います。

コロナ禍の「逆境」とは何かっていうところなんですけれども。それは、本当にフィールドには行けないということですね。フィールドに行けるようになれば、どんどんまた個人研究に戻っていくのかなと思うんですけども。でも、この経験があれば、あるいはまた、いろんな苦しいことがあったら、「じゃあ、あの時やったから、こういう風な形でまたできるんじゃない」という風に、また帰ってくることをするような場所としてもですね、機能するかなと思います。

川口 今、西村先生からポジショナリティのお話が出たので。私もずっとそこ思っていたところですので、1点、言わせていただければと思います。我々、研究課題について当事者ではないわけですね。完全に外部者、二重の外部者なわけですけども、その外部者だからこそできることは何かっていうのは常日頃から考えていました。ある種の研究上の悩みと言いますか、思うところがありました。

それで今回は期せずしてというか、半分は期してたわけなんですけれども。比較をするときに、異なる国の人に同じ質問をして当事者同士で議論してもらうことも面白いかなと思いました。例えば、インクルーシブ教育政策についてマラウイの担当官の方がエチオピアの方に質問をしたり、相互に悩みを共有して頂いたりとかです。そういうことも考えて研究を進めました。ポジショニングとマッピングと言いますか。その2つのところをうまく使ってマッピングをしながら一緒に共同研究みたいな形で進めようと試行錯誤しました。アフリカの方をデータの収奪相手としてではなく、協働研究者として位置付けることを検討しました。協働研究自体にはまだ充分持っていけてはいないですけども、そういうことを考えていました。

小川(啓) 広島大学の日下部先生がおっしゃられた点について、私もコメントをさせていただきます。広島大学では Web of Science とか、Scopus 収録の学術雑誌で何本出版するか、インパクト・ファクターがどれだけ高い学術雑誌から論文を出版するかという点が高く評価をされるということです。神戸大学も同じです。本国際協力研究科では、最近の採用人事や昇級人事の時に、教育実績や途上国における国際協力の経験よりも学術論文を重要視しています。論文が Web of Science 等に収録された国際学術雑誌に載るだけでは充分ではなく、どれぐらいのインパクト・ファクターがある学術雑誌に載るのが重要です。国際共同研究も重要視されています。これが現状です。

日下部 時代の趨勢というのがあって、論文をそういう形で SCI 論文 Web of Sciences、Scopus で出版しているかなきゃいけないというご事情があるっていう背景を共有していただいて、本当にありがとうございます。

坂口 西村先生の方から、全員向けにメッセージいただいております。アフリカ教育研究で不要不急ではなくて重要急な研究はあるのでしょうか、っていうことで。出張の際の説明っていうところも含めて、不要不急ではなく重要急な研究は。先ほどのポジショナリティのところのお話も関連してというところですね。この点をこれからも考えていかなければいけないということにはなるかと思うんですけど。

日下部先生の苦肉の策として、結果としての共同研究という形にはなっているけど、そこから色々広がって、帰る場所となっているっていう言葉。今年度の日本比較教育学会のラウンド・テーブルでも、この研究グループで回を澤村先生が設けてくださって、お話をさせていただいたんですけど。その時にも日下部先生が、普段だと 8 月、9 月っていうのは、基本的に、アフリカ教育研究者、アジアも含めて、8 月、9 月っていないと。いないんだけど、今年度、ある意味行けない「逆境」なんだけど、行けなかったことが 8、9 にしっかりと分析的なことができたのだと。川口先生もおっしゃってくださったんですけど。ただただお互い独立してやっているというよりも、同じ場所に別々のフィールドの研究者が同じインタビューに参加するなんて言うのは、今まで逆にコロナじゃなかったら時間とか、物理的なものでできなかったのができているというので。そのラウンド・テーブルの時も日下部先生、まさに比較教育研究というのを、ドストライクにできているという。乗り越え方というか。そういうものは、本当に共同・協働研究を考えるっていうのを。今までの地域研究としての比較研究じゃなくて、本当に比較をしている研究っていうのは。1 つ大きな、このグループの研究なのかなと勝手に思っています。

ただ、やはりそういう研究ができるってなった時に、先ほどのレビュー論文の大場先生のお話もそうでしたけど。本当に、海外に今不要不急じゃなくて重要急で行かないといけないのかという問いは。西村先生が出してくださったところも。まさにそういう業績が重なることで、逆に「もう行かなくても、今いいですよ」と言われてしまうのも確かに。研究内容そのものというよりも、研究者としての立ち位置は確かに。色々「諸刃の剣」という言葉が正しいか分からないですけど。確かにその点も難しいなと思いました。すみません。色々話してるんですけど、みなさんからも、ぜひ何かあればお話しいただければと。

小川(未) 西村先生のご質問なんですけれども、私自身は、この共同研究をさせていただく中で、より強く現地に行きたい、っていう気持ちが高まったっていうところがあります。例えば、坂上さんが引っ張ってくださっている論文で言うと、COVID-19 禍における学校閉鎖中のラーニング・アクティビティについて調べていて、私自身は、現地のニュース報道とか政府文書とかを当たってるんですけど、例えば 3 か国共通してラジオは最貧困層でもアクセスできるからっていうことで、教育省やユニセフなんかはラジオ教育のプログラムを開発しているんですけど、そのような教育プログラムが、本当に私が普段関わっているケニアの人たちに届いているのかどうなのかっていうところが疑問なんです。政策があって、「貧しい人たちには追加の支援をしますよ」と政府文書は言っていて、でも一方で、実際にはラジオへアクセスできない人もいるというニュース報道があって、じゃあ誰に届いていて誰に届いていないのかっていうのが、どうしても具体的にイメージできないんですよ。NGO のサイトなどには、個別のインタビューも掲載されていて、「生の声」が紹介されていますけど、それでも、支援の正当性を訴えるストーリーの一部に組み込まれていて。なんといいますか、研究者が中立とは言わないんですけども。本当のところの情報っていうものが手に入らなくて。ネットの記事読んでいても、これは本当なのかな、どうなんだろうっていうのがやっぱり分からなくて。はい。だから凄く行きたいという気持ちが募っているっていう感じです。この状況で渡航という決断をされている西村先生が本当にすごいなあとこのところを思っています。

坂口 あと 10 分ほどで、このセッションをクロー징したいと思うんですけど、代表の澤村先生に、ぜひ。今回も座談会ということをご提案くださって。特集論文が英語ということもあって、冒頭の部分で、英語だけではなくて、日本語でもこういう研究を広めるっていうので、座談会もあるんじゃないかっていう。すごく有益なアドバイスをいただいて、このような場を設けることができました。

澤村先生、何かぜひ一言いただけませんか。

澤村 正直に言うと、そんなに深く考えていなかったんですけども、先生方に価値を付けていただいたように思います。意義を見出していただいた、そんな感じなんです。最初の取っ掛かりのアイデアはそこまで深く考えてなかった。当初、科研の中で考えていたのは、従来の比較教育学、日本での論文は単著がほとんどだっているのがありました。科研、本来、調査に行けていれば、今年度ぐらいに、色々とそれぞれのフィールドを相互訪問して、そういう中で共著論文っていうことではないにしても、お互いに学び合いをしたらいいかな、というアイデアが元々あって、そしてこんなことになったわけです。いま先生方がおっしゃっていただいたような、そういう意味もなく、お叱り受けるかもしれないですけど、科研の成果を出さないといけないということもありました。ただ徐々にやっていくと、これが意外に上手くいくかなというような気がしてきて。今日、こういうことになって、緊急避難的なことなんですけれども、コロナ禍じゃなかったらや意味がないというようなものになっても困るなという。

できたら私の今日のあいう日報の発表〔アフリカ教育学会第 28 回大会における発表〕も、コロナ禍だから仕方なくやってるのではなく、後々コロナがなくなっても残り続ける方法なんじゃないかなあ、というような気がし始めています。私としては、本当に先生方のおかげで、これが共同研究に深みを持たせていただいたなということで、改めて感謝申し上げます。

坂口 改めまして、7 名の先生方、本当に今日はありがとうございました。最後に是非ですね。一言いただいて、この特別セッションを閉じたいと思います。

坂上 私のやってることというのは別にコロナじゃなくてもですね、できることで。この逆境を通して、新たな展開というところで、なかなかまた私自身も、今後、色々挑戦していかないとというところで、すごく刺激をいただきました。本当にありがとうございます。

牧 元々、挑戦的比較っていうのが、うちのチームの看板です。タイのことだけやってきたんですけど。やっぱりこの機会はありがたいです。今回の機会を通して、やっぱりタイからアフリカというか、タイとアフリカ諸国を含めてですね。非常に自分の視野がなんか広がっていつていますので。こういう挑戦的比較っていうのを、これからも続けていきたいと思います。

川口 本当にこのコロナの期間は我々も苦しんでいるわけですけども。このコロナが明けた後、アフター・コロナですね。元に戻ってしまうのか、従来と同じような研究をしてしまうのかですね。それとも、このコロナの期間を乗り越えてですね。なんかこうパワー・アップすると言いますか。より新たな地平に開かれるのかですね。研究者としての立ち位置や研究の重要さとかも含めて新しい境地を拓けるのかが重要だと思います。それが 1 つ挑戦していくところではないかなと思います。

大場 一年半ぐらいケニアに行けなくて、ずっと文献レビューをしているのですが、改めて先行研究とか理論研究の重要性を感じています。これはコロナが収束した後も続けないといけないと、改めてその認識をしています。また、新しい試みとして Zoom インタビューをしました。コロナが収束して現地に行けるようになれば、実際現地でインタビューできると思うのですが、その事前段階として、例えば打ち合わせとか顔合わせという形で Zoom インタビューが使えるのかなと思いました。

小川(末) 誰もがアクセスできる素材を用いて研究をするっていうのは、大変っていうことを感じました。試験問題とか教科書とか政策文書とかカリキュラムとか。研究者であれば誰もがアクセスできるようなものを用いてオリジナルな発見をしていく。そういうことって、これまでおろそかにしてきた部分であるんですけども。また、他の国を専門とされている先生方のお話や研究を伺う中で、自分の勉強不足を痛感しているところでもありますし。研究の奥の深さというか、難しさっていうのを改めて感じながら、1 つずつ学びに

させてもらってるかなっていうところがあります。そのような機会をいただいて有難く思っております。

日下部 やっぱこういう集まりがあることによってですね。日本社会のこの殺伐とした雰囲気みたいなものがあつたと思うんですけども、これがあることによって殺伐とはならなかったということは大きいのではないかと思います。コロナで現場に行けなくてデータがとれないっていう、ずっと頭を傾げるばかりじゃなくて。こういう形で、ちょっと前向きにやりましょう、という風なことで、組織的な研究を進めてきたというのは、この科研のグループが非常に強固なメンバーシップを持っていたという証左であると思います。非常に救いであつたという風に思います。

リナ 学生として、私は右も左も見ないで、自分の博士論文に没頭することに慣れていました。でも、この特集論文に参加することは、自分にとっての始まりでした。私は自身のグループで学び、坂口先生のグループといった別のグループからも学んでいます。私は、そのような類の調査をいかにリードするのかについて学ぶことができました。ですから、活動を通じて、私はとてもたくさんのことを学んでいると言うことができます。

以上

Gender Differences in Awareness and Participation: Case of Information Sharing Practices in Maasai Community in Kenya

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Abstract

It is widely discussed that information sharing can bond the community and school to promote quality education services. This article attempts to examine how awareness and participation regarding children's education differ by gender of parents before and after text-message information sharing practices in the Maasai community in rural Kenya. Our research does not reveal a simple gender difference in awareness and participation in schools, but more nuanced gender gaps in effects. On average, the positive relationship between accurate awareness of school performance and meeting attendance was much stronger for female guardians than male counterparts after information sharing. An interactive factor of gender and education level was negatively associated with awareness and meeting attendance at baseline, but such a relationship disappeared after information sharing. Furthermore, female guardians improved more awareness after information sharing than males in high-performing schools, while male counterparts reduced their meeting attendance more than female ones.

Keywords: information sharing, text-messages, gender, participation, Kenya

1. Introduction

Both the neoliberal and communitarian approaches to school-based management and parental participation in schools have emphasized the importance of information sharing as a critical mechanism in bonding the community and school to promote quality education services (Nishimura, ed., 2020). Information sharing has been considered an effective strategy for strengthening accountability directly from education providers to beneficiaries, such as parents, as they can utilize the information by voicing their opinions (Bruns et al., 2011). In this accountability logic, the dissemination of quality information is expected to “empower parents and communities to make better decisions in terms of their children's schooling” (Read & Atinc, 2017, p. 5). The underlying assumption is that if community members are informed and given a chance to express their views, schools will improve the quality of the education they provide and meet the community's needs (Bruns et al., 2011; World Bank, 2003).

However, we have never examined how male and female guardians perceive and use the education information, especially in a traditional community where men and women have different roles and responsibilities and, hence, different decision-making power pertaining to school-related matters. If women comprise the majority of those attending school meetings but do not have decision-making power in the household, what effect does the information shared in school meetings have? In a Maasai community in rural Kenya, where the second author has run a research project for five years prior to conducting this study, women tend to be present at school meetings but not to have decision-making power at home. Thus, decisions made during school meetings are left unimplemented when the women's husbands, the decision-makers on almost everything related to family issues, especially household expenditures, disagree with the decisions made and refuse to support them. For example, we had encountered challenges in implementing scheduled activities outlined in school development plans when women were the prominent participants in the community meetings at which the plans were approved. As a result, the planning and implementation of school activities were often left to a few school administrators, such as head teachers and the school's board of management members. School administrators also sometimes assume that women are incapable of fully participating in planning as they are mostly uneducated. This experience prompted us to investigate how awareness and participation regarding children's education differ by gender through information sharing practices in the context of the Maasai community in rural Kenya.

We conducted an intervention in 30 schools in the 30 villages where we ran the project. We disseminated information

on the school's performance, school events, and possible action taken by parents for school activities to over 2,000 parents and guardians for eight months through text messages and school meetings and then conducted analyses to determine gender differences in the way information impacted parental perceptions and actions pertaining to their participation in their children's education. We collected panel data for these analyses by conducting a baseline survey in May 2018 and an endline survey in January 2019 with 480 samples. By administering pre- and post-surveys with parents and guardians, this research revealed how awareness and participation differ by gender before and after information sharing.

The following section reviews the existing literature on the role of information in the accountability discourse, gender perspective in school-based management, and the context of Kenya. Section 3 outlines the methodology and data, followed by a review of the findings in Section 4. Section 5 presents the conclusion with theoretical and practical implications.

2. Literature review

2.1. Information sharing for accountability

Information sharing has drawn attention as a cost-effective tool for changing behavior and as a nudge to inducing parents' positive behavior. In the educational context, information is expected to strengthen accountability and improve learning outcomes through three channels: increasing choice, participation, and voice (Bruns et al., 2011). Information promotes choice, as informed parents who are aware of school performance move their children to different schools when they learn their current school is performing poorly. A neo-liberal perspective expects this to increase competition among schools and, hence, to improve the quality of education. Information can also inspire parental collective action to improve a school by motivating parents to participate in monitoring their school's performance. Furthermore, information can prompt parents/guardians and community members to raise their voices to advocate for improvements to education services. Voice can be a pressure to governments for improved policies at the local and national levels. As such, becoming aware of the conditions and situations in schools is the first step in and the basis for parents' decision-making on actions related to their children's education.

Nevertheless, the literature presents mixed results on the relationship between information sharing and improvement in parental awareness of educational needs. For example, Andrabi et al. (2017) indicated that information sharing through report cards improved the awareness of school and child performance in Pakistan. In contrast, Banerjee et al. (2010) found that, in India, parents' awareness of their roles and those of village education committees did not broaden after they were given general information on the status of educational provisions and available resources at the village level.

Empirical evidence is also mixed as to the linkage between various types of information and participation and voice. Although providing performance-related information through score cards improved the test scores of public schools owing to increased interaction between parents and schools in India (Andrabi et al., 2017), no such impact was achieved in rural Kenya (Lieberman et al., 2014). Even in India alone, conflicting evidence has been derived. Pandey et al. (2009) found that providing information on the roles and responsibilities of school management committees improved parental interactions with teachers and the aforementioned groups. In contrast, Banerjee et al. (2010) found no effect of information sharing on the roles of village education committees devoted to parental action, such as visiting a school.

Our empirical research in Kenya uncovered that information sharing through text messages affected parents who had already been aware of the school and their child performance by improving the accuracy of their understanding of the information (Yamada & Nishimura, 2020). In contrast, the majority who had not been aware of such information beforehand did not enhance their information accuracy on school and child performance (Yamada & Nishimura, 2020). We also found that information can work negatively. Parents who had accurate information on their children's performance at the baseline financially contributed less to the school at the endline: this implies that if information carries a negative message on school quality or child performance, parents may divert their household expenditures to activities other than schooling.

2.2. Gender perspective in school-based management

What makes information function differently among parents in the same community? Alsop and colleagues (2006, p. 11)

asserted that agency, defined as “the ability to make effective choices,” is an essential concept in understanding people’s behavior. If parents do not possess agency, they cannot fully participate in and express their opinions regarding school management. Psychological, informational, organizational, material, social, financial, and human assets affect agency (Alsop et al., 2006). In Chile, for instance, parents who have perceived self-efficacy participated more in school activities (Gubbins & Otero, 2020). Moreover, parents who have higher socioeconomic statuses, networks, and awareness of school situations may exercise more effective choices in school-based management.

How does gender interplay with other socioeconomic factors in agency? As gender imbalances characterize many societies in terms of the magnitude of power and assets, possession of agency may differ by gender in various social settings. Education seems to play an essential role in determining the agency of parents, particularly of mothers. In Ghana, Tanzania, and the Philippines, for example, parents with a higher level of education spoke out more on schooling and development projects (Mfum-Mensah & Friedson-Ridenour, 2014; Phillips, 2013). Educated women in Nigeria participated more in decision-making during community meetings and raised more voices than their non-educated counterparts (Egbo, 2000).

Another critical factor that affects the impact of information on educational quality and accountability is the institutional context in which actors can influence their ability to act. While school management committees affect gender equality in schools, gender parity in school management is not enough to strengthen accountability (Nishimura, 2017; Unterhalter et al., 2018). Often, a male-dominant culture or value hinders women’s actual participation and voice. In rural Ethiopia, for instance, women’s involvement outside the home was limited, and few women joined the Parent Teacher Associations or participated in school planning meetings (Swift-Morgan, 2006). Yamada (2014) also indicated that school management committees favor educated males in Ethiopia. In Tanzania, fathers often hold the decision-making power on financial contributions made to schools, although both fathers and mothers participate in meetings (Masue & Askvik, 2017). In the school management committees in Guatemala, women’s participation is limited to taking care of children and preparing meals during school meetings (Gershberg et al., 2009). This research evidence suggests that gender power dynamics should be carefully considered in the process of school-based management by those who utilize shared information in schools.

Finally, limited evidence exists on differences in how information affects behavior according to gender in developing countries. Cummings and O’Neil (2015) illustrated that the usage of information and communication technology in Uganda and Nigeria led to the improvement of women’s self-confidence and self-esteem. This implies that information may enhance women’s agency and lead them to participate and speak up regarding school-based management. Nonetheless, much remains to be investigated regarding the impact of information on gender equality in voicing and decision-making and in the gender dynamics of community participation in schools.

2.3. Context of Kenya

While the free primary education (FPE) policy introduced in 2003 triggered a dramatic increase in enrollment, it also raised some accountability concerns in Kenya as well as in other sub-Saharan African countries that implemented similar policies (Ogawa & Nishimura, 2015). One such concern revolved around the announcement that primary education was to be provided free in a top-down manner. Some public school parents misunderstood this to mean that the government would be responsible for every educational issue, thereby leading to passive parental participation in schools (Ogawa & Nishimura, 2015). Because the highly centralized FPE policy in East Africa coexisted with a decentralization policy, confusion over central and local control arose (Sasaoka & Nishimura, 2010). Moreover, the implementation of the FPE policy also raised quality concerns. For example, only 3 out of 10 pupils in grade 3 met the grade 2 proficiency levels in math and literacy in 2015 (UWEZO, 2016). Private schools have also dramatically increased, given the high pupil-teacher ratios in rural public schools (Nishimura & Yamano, 2013). Parents appear to judge private schools as a better alternative than public schools on the grounds of educational quality. When making school choices, parents in Kenya tend to react based on their information on the quality of education (Nishimura & Yamano, 2013).

Kenya has long held a tradition of community-based, bottom-up mutual help, which takes place through a mechanism called *Harambee* (pull together). However, the central regulatory tendency to control this practice and the dominance of local politicians and paraprofessionals in decision-making have discouraged community members from actively participating in decision-making regarding school education since the 1980s (Ngau, 1987). Concurrent decentralization

policies in East African countries have further restricted the movement of school management committees, given the imposition of central guidance and the “closed-door” orientation of local elites (Sasaoka & Nishimura 2010). Furthermore, Kenya’s 2015 Basic Education Regulation prompted a change in structure, resulting in the conversion of the school management committee to the board of management and the upgrading of the minimum qualification for board positions to high school education. These educational reforms created a distance between committed but less-educated community members and school management. Nevertheless, parents continued to contribute to schools out of necessity, owing to the government’s freezing of teacher recruitment, despite the tremendous increase in access to primary education stemming from the FPE policy (Nishimura, 2019).

Historically, in Loitokitok sub-county, where we implemented a project, education for women has not been prioritized, and a wide gender gap persists. According to the UWEZO 2013 survey, only 18.5% of mothers could read an English story in Loitokitok, compared to 48.8% of all mothers in Kenya (UWEZO, 2013). The percentage of female household heads in Loitokitok sub-county who never attended school was 76.3%, compared to 56.3% of the male household heads (UWEZO, 2013). Thus, the magnitude of gender inequality is relatively large with regard to education in Loitokitok.

Although the gender gap that exists in relation to access to school is minimal according to the national average in Kenya, gender differences persist in completion rates and academic performance. According to census data, the gender parity indices in primary and secondary schools were 0.97 and 0.95, respectively, in 2016 (Ministry of Education, 2016). The promotion rate from primary to secondary school stands at 81.3% for boys and 78.4% for girls. The UWEZO survey, the household learning assessment in East Africa, revealed in 2015 that girls outperformed boys in Grade 3 in Grade 2-level literacy and numeracy in public schools in Kenya. This tendency was consistent with outcomes from Grade 8 (UWEZO, 2016). Nevertheless, Lucas and Mbiti (2012) found that the FPE policy worsened the gender gap in favor of boys in the completion of primary school and in achievement in the leaving examination called the Kenya Certificate of Primary Education (KCPE), especially in public schools. Early pregnancy and marriage are major obstacles to the continuous education of girls, and delayed enrollment exacerbates the situation (Lucas & Mbiti, 2012).

It goes without saying that gender parity in enrollment is insufficient to understand the accurate gender equality picture. Nevertheless, gender equality is often measured by gender parity in enrollment and teacher composition, without addressing the gender disadvantage in the level of schooling completed (Unterhalter & North, 2011, p. 506). Even in practice, gender norms can be informally reproduced by education stakeholders, such as teachers, through hidden curriculums. Milligan (2014, p. 472) noted that teachers often blame girls’ early pregnancy and dropout in rural Kenya on their lack of serious commitment to their education. Textbooks can also serve to reinforce the existing gender norms: some studies have reported women’s exclusion from math and science textbook content (Maeda, 2012) and from decision-making processes related to community and political engagement in the content of social studies textbooks in Kenya (Foulds, 2014, p. 666). Furthermore, Tumushabe et al. (1999) indicated the persistence of teachers’ and pupils’ beliefs in male superiority in intelligence in Uganda as well as in other African countries, implying such views might affect teachers’ expectations, instruction, and assessments in the classroom. As this discussion illustrates, the gender issue in education should be carefully examined, looking at how gender inequalities occur in the education process, including in the school-based management that influences the daily operation of schools.

Traditionally, Maasai women have been expected to take care of the family and not challenge men’s decision-making in Loitokitok (Archambault, 2017). In contrast, Maasai men have been perceived as the protectors of their families, the decision-makers, and the providers of financial and physical materials for families in this region. However, Archambault (2017) further described that some Maasai women started small businesses or raised their political voices, while some men suffered from unemployment and alcoholism. This situation indicates that Maasai men try to maintain their decision-making powers in every aspect of family life, although women contribute to the protection of and provisions for the family, albeit without decision-making power. Under such circumstances, Maasai women are still likely to lack agency (e.g., educational, social, economic, and political freedom) and encounter barriers constructed by the male-dominant culture. The women’s lack of freedom in decision-making is likely to affect their participation and voice in school-based management.

3. Research design and methodology

3.1. Research questions

This study was conducted to answer the following research questions, given the literature gap addressed in the previous section:

1. How does gender associate with the degree of awareness of school performance and participation in school meetings?
2. How does the association between gender and awareness as well as between gender and participation change after the information sharing intervention?

3.2. Intervention

A Japanese NGO, Global Link Management Institute (GLMi), initiated a project, the Capacity Development for Village-Based Sustainable Education Strategy (CADVES), in 30 public schools in 30 villages of Loitokitok, Kajiado County, in Kenya in March 2017. The three-year project aimed at enhancing parental awareness of learning and collaborative activities at the school and community levels. Under this endeavor, the main activities included holding community meetings to create a school development plan, conducting early grade remedial lessons in literacy and numeracy, and making an inclusive environment for children with disabilities.

The target area is dominated by the Maasai ethnic group, for whom educational development has been historically delayed in Kenya. School education has gained momentum since the 2000s because of climate change and the government's resettlement policy that made a pastoral life difficult (Nishimura, 2019). Maasai children who are currently studying are mostly the first generation among family members to be enrolled in school. Many parents nowadays have cell phones and use text messages for communication, which prompted our intervention of information sharing through text messages.

3.3. Methodology

This study was conducted in 30 schools in 30 villages of Loitokitok, Kajiado County, in Kenya. Through the CADVES project of GLMi, we intensified information sharing at the community level by sending text messages directly to over 2,000 parents and guardians in 30 schools and including them in discussions on school development planning through facilitated meetings¹. Text messages were sent to parents and guardians who registered their cell phone numbers. Specifically, 63 messages in Kiswahili, the national language of Kenya, were sent at the rate of once or twice weekly for eight months from May 2018 to January 2019. While we do not know exactly how many times parents and guardians received and read our messages, those who reported to us that they have never received messages were removed from the analysis.

In general, three types of information were shared with the community via text messaging:

- *Information to raise awareness:* The importance of education and of including the voice of women in school-based management, the school's mean score of the KCPE exam, messages encouraging parents to check their children's grades and positions on report books at the end of each term, sub-county learning performance (i.e., UWEZO's learning assessment results), board of management roles, and information on out-of-school children and early pregnancy issues.
- *Information to induce participation:* Messages encouraging school visits to monitor activities and contribute to decision-making, announcements of school-community meeting schedules, examples of effective community initiatives, and information intended to sensitize community ownership.
- *Information to drive private actions:* Action-suggestive information, such as generating learning time at home, monitoring child learning at home, and discussing school activities and events with children at home.

The first information is assumed to raise parents' collective spirit for school while the third information entices their individualistic concern for their own children. The second information nudges parents and guardians to take actions for the collective benefit of children in the community.

3.4. Sample data and analytical methods

For this research, we randomly selected 16 parents and guardians from each school, for a total of 480 respondents, to complete a baseline survey in March 2018 and an endline survey in January 2019. The baseline survey was designed to collect data on socioeconomic status, the degree of understanding of school performance and participation in school meetings. We then validated the accuracy of parents' awareness of school performance by checking their responses against information from the 30 schools. Sixteen guardians from one school were removed from the analysis because no KCPE test had been conducted at that school. In the baseline, one parent was incorrectly sampled. Further, nine have not received our text messages at all, resulting in 454 samples. In the endline, ten additional parents were lost due to migration and refusal to participate in an interview, leaving 444 respondents. Despite these challenges in sampling, the attrition rate was low (7.5%).

The gender distribution of participant guardians was almost equal in the baseline sample: 230 (50.7%) male and 224 (49.3%) female. All male guardians were fathers, and most female guardians were mothers, while eight of the 224 females were foster guardians. Two female research participants who forgot to answer their relationship is assumed to be mothers. The percentage of male guardians who could read Kiswahili at baseline was 50%; the rate for female guardians was 37%. This gender gap in literacy corroborates the evidence found in the existing literature and survey results. We inquired about the primary language spoken at home at baseline: 89.2% (405) answered "Maasai," showing that our sample mainly represented members of a Maasai community in Loitokitok.

Using the data gathered through the baseline and endline surveys, we conducted the following statistical analyses. Since we are interested in gender differences in awareness and participation, we compared the results before and after the information sharing intervention. The descriptive statistics and t-tests determine simple differences in awareness and participation by gender of the respondent at both the baseline and endline.

The statistical analysis was also conducted for baseline and endline data separately to compare data in pre- and post-intervention. The logistic regression analysis predicted the likelihood that the guardian accurately perceived school performance. The statistical formula drawn is as below.

$$\ln\left(\frac{P_{i,t}}{1 - P_{i,t}}\right) = b_{20} + b_{21}G_i + b_{22}Y_{i,t} + b_{23}Z_{i,t}$$

$P_{i,t}$ is the probability that guardian i accurately perceived the school's KCPE performance at either the baseline or endline. b represents the regression coefficients. Here G_i signifies the gender dummy of guardians who responded to the survey. $Y_{i,t}$ is the degree of participation of guardian i at either the baseline or endline and $Z_{i,t}$ represents a vector of a set of control variables of guardian i at either the baseline or endline. We assumed that parents would increase their awareness in the process of participation. However, the opposite may also be true: parents who were aware of school education would participate in the school-based management.

We also applied multiple linear regression models for cross-sectional data at both the baseline and endline to determine the gender effect on participation using the following equation.

$$Y_{i,t} = b_{10} + b_{11}G_i + b_{12}X_{i,t} + b_{13}Z_{i,t} + u_{i,t}$$

where $X_{i,t}$ denotes the dummy variable of accuracy in the perceived performance of guardian i at either the baseline or endline. The critical methodological challenge we faced was that no control group was available in this survey. We cannot argue a causal claim of information on parental behavior. There is a chance that our expected result would be null or opposite causality to our hypothesis.

4. Results

4.1. Descriptive statistics and result of t-tests

Table 1 shows the descriptive statistics of variables by gender of guardians. Distance from home to school and education

level were collected only at the baseline, but used for regression analysis for both baseline and endline. Table 1 shows both self-reported awareness and accurate awareness of the KCPE score. The self-reported awareness is not valid since guardians just answered that they would know the result without validating the actual result. Thus, we developed accurate awareness of the KCPE score by setting up the accuracy level for -1 and +1 of the actual school mean score. If guardians answered scores within the accuracy levels, they were considered to have accurate awareness. If not, they were considered to have inaccurate awareness (See Appendix 1 for a more detailed description and the way to deal with missing values). Similar to the result of self-reported awareness, we see the improvement of both male and female guardians in accurate awareness in endline. We used accurate awareness of the KCPE score as the indicator of awareness in the following section.

Table 1. Descriptive statistics by gender of guardians

Variables	Data collected	Parent Gender=Male				Parent Gender=Female				Differences	
		Mean (1)	SE	Range	N	Mean (2)	SE	Range	N	(1)-(2)	t-values
<u>Individual variables</u>											
Meeting attendance in 2017 (0-5 times)	Base	3.62	0.09	0-5	230	3.75	0.10	0-5	224	-0.13	-1.01
Meeting attendance in 2018 (0-5 times)	End	3.49	0.08	0-5	223	3.61	0.08	0-5	221	-0.11	-1.00
Self-report awareness of 2017 KCPE score (%)	Base	20.43	2.66	0 or 100	230	19.20	2.64	0 or 100	224	1.24	0.33
Self-report awareness of 2018 KCPE score (%)	End	43.50	3.33	0 or 100	223	36.20	3.24	0 or 100	221	7.30	1.57
Accurate awareness of 2017 KCPE score (%)	Base	14.78	2.35	0 or 100	230	13.39	2.28	0 or 100	224	1.39	0.42
Accurate awareness of 2018 KCPE score (%)	End	29.60	3.06	0 or 100	223	25.79	2.95	0 or 100	221	3.80	0.89
Age (years)	Base	42.69	0.66	25-68	176	39.67	0.63	23-62	181	3.02	3.32**
Meals per day in 2017	Base	2.60	0.04	1-3	230	2.71	0.03	1-4	224	-0.11	-2.11*
Meals per day in 2018	End	2.62	0.04	1-3	223	2.63	0.03	1-3	221	-0.01	-0.21
Education level (0-4)	Base	0.59	0.06	0-4	230	0.40	0.05	0-4	224	0.19	2.61**
Distance from home to school (1-5)	Base	2.69	0.09	1-5	230	2.64	0.09	1-5	224	0.05	0.43
Self-efficacy in participation (1-5)	Base	4.84	0.04	1-5	230	4.89	0.04	1-5	224	-0.05	-0.80
Self-efficacy in participation (1-5)	End	4.74	0.06	1-5	223	4.54	0.07	1-5	221	0.20	2.35*

Note: **, *, and † indicate statistical significance at the 1%, 5%, and 10% levels, respectively.

Source: Authors

Table 1 also shows if the gender difference in each variable is statistically significant in the t-test. The simple t-test does not find any statistically significant gender difference in meeting attendance and awareness in baseline and endline. We find the statistically significant gender difference in age, meals per day in 2017, education level, and 2018 self-efficacy. This shows that female guardians were younger, fed their child more meals in 2017, had lower education levels, and had lower self-efficacy in participation in 2018 than male ones.

We decided to omit age and self-efficacy from further analysis due to data limitations. The age values are missing for 97 guardians. Further, many parents may not recognize their age correctly since age is not commonly recognized in the Maasai community. As for self-efficacy, almost all guardians answered that they felt very confident participating in school meetings, not giving us any valid distribution of the variable.

One of the limitations of this study is that school-level factors are not accounted for in the regression analysis. We decided to use only individual variables in the regression analysis because the number of individuals nested at school is too small to construct a multi-level model. However, in order to see the potential school factors that would affect gender difference in attendance and awareness, we showed meeting attendance and awareness by school KCPE mean score. One assumption is that guardians are aware of school performance and actively involved in collective school activities when the school is performing well.

Table 2 shows gender differences in awareness and attendance, dividing schools into three by KCPE mean score. Before the information sharing started, male guardians in high-performing schools were more accurately aware of their school's KCPE performance than female guardians, with a level of statistical significance at a 5 percent level ($t=1.70$, $p<0.05$). However, such a significant gender difference disappeared after information sharing. While the percentage of correct awareness among male guardians in high-performing schools was around 28% consistently before and after the intervention, the rate among female guardians rose from 16% to 31%. This evidence implies that the impact of information

sharing was high among female guardians, especially in high-performing schools. Another interesting result is a gender difference in meeting attendance in KCPE high-performing schools. While we did not find a significant gender difference in meeting attendance in nine high-performing schools before information sharing, the difference became notable after the intervention. Although all guardians decreased the number of meeting attendance after the intervention, the decrease of female guardians was smaller than that of male guardians.

Table 2. Gender difference in meeting attendance and awareness by school KCPE performance

Variables	# of schools	Parent Gender=Male				Parent Gender=Female				Differences	
		Mean (1)	SE	Range	N	Mean (2)	SE	Range	N	(1)-(2)	t-values
Baseline											
-Low KCPE mean (185.86-233.96)	9				71				69		
Meeting attendance in 2017 (0-5 times)		3.45	0.15	1-5		3.46	0.17	1-5		-0.01	-0.06
Accurate awareness of 2017 KCPE score (%)		1.41	1.41	0 or 100		1.45	1.45	0 or 100		-0.04	-0.02
-Middle KCPE mean (236.93-269.71)	11				84				87		
Meeting attendance in 2017 (0-5 times)		3.52	0.15	0-5		3.76	0.16	0-5		-0.24	-1.08
Accurate awareness of 2017 KCPE score (%)		14.29	3.84	0 or 100		20.69	4.37	0 or 100		-6.40	-1.10
-High KCPE mean (277.6-340.39)	9				75				68		
Meeting attendance in 2017 (0-5 times)		3.89	0.14	0-5		4.03	0.16	0-5		-0.14	-0.63
Accurate awareness of 2017 KCPE score (%)		28.00	5.22	0 or 100		16.18	4.50	0 or 100		11.82	1.70†
Endline											
-Low KCPE mean (172-239.53)	9				70				64		
Meeting attendance in 2018 (0-5 times)		3.27	0.12	1-5		3.19	0.15	1-5		0.08	0.44
Accurate awareness of 2018 KCPE score (%)		27.14	5.35	0 or 100		23.44	5.34	0 or 100		3.71	0.49
-Middle KCPE mean (242-274)	11				83				89		
Meeting attendance in 2018 (0-5 times)		3.78	0.13	1-5		3.66	0.14	0-5		0.12	0.63
Accurate awareness of 2018 KCPE score (%)		32.53	5.17	0 or 100		23.60	4.53	0 or 100		8.93	1.30
-High KCPE mean (278-329)	9				70				68		
Meeting attendance in 2018 (0-5 times)		3.37	0.14	0-5		3.93	0.13	0-5		-0.56	-2.89**
Accurate awareness of 2018 KCPE score (%)		28.57	5.44	0 or 100		30.88	5.64	0 or 100		-2.31	-0.29

Note: Between-school means of KCPE school mean score at 29 school are 258.08 (SD=37.04) in 2017 and 256.35 (SD=36.27) in 2018.

**, *, and † indicate statistical significance at the 1%, 5%, and 10% levels, respectively.

Source: Authors

4.2. Regression analysis on awareness and participation

Table 3 reveals the logistic regression analysis results for the cross-sectional data of the baseline and endline, respectively. The table displays the coefficients rather than the odds ratios. Here, we tested models with and without interaction factors separately. Interaction terms were incorporated into the final model when they were significantly associated with awareness, in a simple regression model only controlling for gender.

The association between gender and the accuracy of guardians' recognition of school performance is not statistically significant in main models either at baseline or endline. However, interesting results are shown in interaction models. The interaction term of gender and parent's education is negatively associated with accurate awareness at the baseline. Among male guardians, one education level change is associated with a 0.58 log-odds difference in having accurate awareness at baseline, on average, holding other variables constant. However, such a positive association between education level and awareness at baseline is cancelled out to zero among female counterparts. This indicates that education was an advantage in knowing school performance among male guardians before information sharing. However, such a tendency disappeared after our intervention.

Another notable finding is that an interaction term of gender and meeting attendance is positively associated with awareness at endline, on average, holding other variables constant. This indicates that the effect of meeting attendance on school performance differed by gender. As we illustrated in the data provided in Table 3, meeting attendance is associated with accurate awareness in main models with statistical significance both at the baseline and endline. In the interaction

model at endline, gender is negatively associated with awareness, holding other variables constant. This shows that female guardians who rarely attended the meeting were less likely to know the school performance than their male counterparts. However, the effect of meeting attendance on accurate awareness is higher for females on average (the coefficient is 0.65 for females and 0.17 for males). As meeting attendance increased, female guardians were more likely to know the school performance than male counterparts. Thus, the impact of meeting attendance on raising accuracy in their awareness is higher for female guardians than male guardians. In other words, female guardians were more likely to have their correct awareness when they attended many meetings.

Table 3. Determinants of correct awareness of KCPE score

	Baseline		Endline	
	Main	Interaction	Main	Interaction
<i>Gender (Male=0, Female=1)</i>	-0.12 (0.28)	0.21 (0.34)	-0.21 (0.22)	-2.03* (0.82)
<i>Meeting attendance*</i>	0.47** (0.13)	0.46** (0.13)	0.40** (0.10)	0.17 (0.14)
<i>Meals per day*</i>	0.19 (0.27)	0.19 (0.27)	0.05 (0.22)	0.08 (0.22)
<i>Parent's education</i>	0.37* (0.15)	0.58** (0.19)	0.28* (0.14)	0.31* (0.14)
<i>Distance to school</i>	-0.07 (0.11)	-0.07 (0.11)	-0.37** (0.09)	-0.37** (0.09)
<i>Gender × Parent's education</i>	-	-0.58† (0.35)	-	-
<i>Gender × Meeting Attendance*</i>	-	-	-	0.48* (0.21)
Constant	-4.15** (0.97)	-4.29** (0.98)	-1.69* (0.71)	-0.94 (0.76)
Pseudo R-square	0.066	0.074	0.073	0.084
Probability>chi-square	0.00	0.00	0.00	0.00
N	454	454	444	444

Note: **, *, and † indicate statistical significance at the 1%, 5%, and 10% levels, respectively. Figures for independent variables are coefficients and figures inside the parenthesis are standard errors. Variables marked with * are time-variant. Multicollinearity was checked for independent variables for each model.

Source: Authors

Table 4 shows the results of the multiple linear regression analysis predicting meeting attendance in baseline and endline surveys. Similar to Table 3, models with and without interaction terms are tested separately.

The main models do not present gender differences in meeting attendance with statistical significance at baseline and endline. However, interaction models provide nuanced evidence. As Table 4 shows, on average, an interaction term of gender and parent's education is negatively associated with meeting attendance with -0.31 with statistical significance at ten percent level, holding other variables constant. However, such a relationship is not found in endline. Female guardians attended more meetings than male counterparts on average before information sharing, holding parents' education zero and other variables constant. Higher levels of education, however, were disadvantageous for meeting attendance of female guardians before information sharing, but such a disadvantage for female guardians disappeared after information sharing. There is also a positive association between meeting attendance and an interaction term of gender and accurate awareness at endline, holding other factors constant. Here again, the association between meeting attendance and awareness is more substantial and positive among female guardians than male guardians after information sharing. Controlling for other factors constant, female guardians who knew the accurate KCPE mean score attended meetings 0.78 times more than those without accurate awareness after information sharing. In contrast, male guardians who knew the accurate KCPE mean score attended only 0.27 times more than those without accurate awareness after information sharing, holding other factors constant. The accuracy of the guardians' recognition of the KCPE mean score is associated with meeting attendance at both the baseline and endline. Guardians who were aware of the school performance were likely to attend the meetings. It may also hold true that meeting attendance was likely to improve the accuracy of their awareness of school performance. In either case, such a relationship is more salient among female parents after information sharing.

Table 4. Determinants of Attendance at Meetings

	Baseline		Endline	
	Main	Interaction	Main	Interaction
<i>Gender (Male=0, Female=1)</i>	0.12 (0.13)	0.27† (0.15)	0.11 (0.11)	-0.03 (0.13)
<i>Accurate awareness*</i>	0.74** (0.19)	0.70** (0.19)	0.52** (0.13)	0.27 (0.17)
<i>Meals per day*</i>	0.03 (0.12)	0.03 (0.12)	0.30** (0.11)	0.29** (0.11)
<i>Parent's education</i>	-0.08 (0.08)	0.04 (0.11)	-0.12† (0.07)	-0.12† (0.07)
<i>Distance to school</i>	-0.01 (0.05)	-0.01 (0.05)	0.03 (0.04)	0.02 (0.04)
<i>Gender × Parent's education</i>	-	-0.31† (0.17)	-	-
<i>Gender × Correct awareness*</i>	-	-	-	0.51* (0.25)
Constant	3.51** (0.35)	3.44** (0.36)	2.55** (0.32)	2.66** (0.32)
R-square	0.038	0.045	0.064	0.073
Adj. R-square	0.027	0.032	0.053	0.060
Probability>F	0.004	0.002	0.00	0.00
N	454	454	444	444

Note: **, *, and † indicate statistical significance at the 1%, 5%, and 10% levels, respectively. Standard errors are figures in parentheses. Variables marked with * are time-variant. Multicollinearity was checked for independent variables for each model.

Source: Authors

5. Discussion and conclusion

Our research sought to reveal the relationship between gender and parental awareness and participation before and after information sharing practice in 30 schools in Loitokitok where gender disparity and gender roles persist. While the results cannot be generalized to other contexts, we can draw several theoretical and practical conclusions.

We found that our intervention on information sharing improved guardians' accuracy of information to a great extent and the improvement was equally seen on both genders on average. In this sense, information sharing did not favor any gender in terms of recognition of given information on school performance. It should be noted that female guardians could obtain accurate information after our intervention despite their lower education level. Further, it is especially so in high-performing schools where female guardians' accurate recognition of school performance was enhanced in a much larger magnitude than that of male guardians. The higher level of school performance may have raised female guardians' awareness or at least drawn more attention than before. In other words, the type and quality of information may matter when it comes to awareness-raising.

The remarkable result is seen in that the positive relationship between awareness and meeting attendance is stronger among female guardians than male guardians after information sharing. There are two potential causal mechanisms. On the one hand, female guardians attended more meetings than male counterparts after they knew correctly about school performance, possibly through text messages. On the other hand, female guardians learned more about school performance than male guardians by attending many meetings. While causality is not clear in this research, in either case, it is plausible that information sharing is likely to favor female guardians.

Furthermore, education was much more beneficial to male guardians for learning school performance than female counterparts before information sharing. However, education no longer favored males after information sharing although educated guardians, regardless of gender, still learned school performance correctly. In contrast, while the effect of education was more negative in female meeting attendance than male meeting attendance before information sharing, such a gender gap became no longer existent after the intervention. A notable fact in this area is that meeting attendance is lower for educated parents regardless of gender. In the Maasai community where most female guardians are uneducated, the less educated women attend school meetings more. While whether the uneducated women exercise agency in meetings should be investigated further, this result casts a contested result to the existing literature and our conventional knowledge.

In a Maasai culture where women hardly have a public space to express their voice, a school may function as their place to potentially nurture their agency.

The result for male guardians needs careful interpretation. In high-performing schools, the meeting attendance of male guardians dropped more significantly than female ones. The relationship between awareness and meeting attendance for male guardians is less intense than female guardians after information sharing. It is plausible that male guardians exercised their influence on schools through other channels, such as formal and informal gatherings outside schools. As discussed in the literature review, male adults tend to hold decision-making power in the Maasai community; thus, information would shift their participation from formal to informal back-door meetings or other formal social occasions. In contrast, as women are not public figures in general, school meetings may be rare occasions to grow and exercise their agency. It is still uncertain whether female guardians are empowered to attend formal meetings and increase voices at school after information sharing. Equally important to know will be how and in what ways male guardians use their information in both other formal and informal social gatherings and meetings.

In conclusion, our research indicates that there is a gender difference in the effect of information. Although further research is needed to examine how accurate information is utilized for household decisions on the child's education, information sharing in school seems to transfer information to female guardians in a more effective way.

Further research is required in mainly three areas. First, it will be crucial to examine if information triggers the influence or voice of female guardians in school-based management as well as at the household-level decision-making. It will be essential to assess whether female guardians with accurate information can subsequently take collective actions in school in the context where men still hold major decision-making on child enrollment and household expenditures on education. Second, the relation between a type of information and the subsequent behavior of guardians is worth investigating in the future. Negative or positive information or convenient or inconvenient information exists. What kind of information encourages more participation should be examined further to identify the impact of information sharing. Third, our contrary finding to the previous literature on the impact of the education level of guardians on their participation should be investigated further. How educated female guardians transform information into different ways of expressing their demands or judgment on school will be an exciting theme to pursue. They may withdraw from schools once they see negative school information (i.e., exit) or negotiate with schools on how to improve the current situation rather than attending school meetings (i.e., voice). Rich qualitative research on the intrahousehold decision-making process as well as the actual voices in the school meetings should be attempted in the future. Multi-level regression analysis can potentially take the institutional context into account, for which we need a larger scale of data set.

Notes

- 1) The research is conducted under the project agreed by the Ministry of Foreign Affairs, Japan and Kenyan government. We received the approval to conduct the survey from the district education office, Loitokitok, and received the consent to participate in the survey from each parent and guardian.

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Appendix 1. Description of variables and the way to handle missing values

Variables	Description	Missing value
Individual variables		
1. Meeting Attendance	The number of parent meeting parents attended 6 scales (0: 0, 1: 1, 2: 2, 3: 3, 4: 4, and 5: 5 or more) for the meetings in the previous year in 2017 (Baseline) and 2018 (Endline)	The average attendance for his school in 2017 is assigned for a father who missed answering the meeting attendance at the baseline.
2. Self-report awareness of KCPE score	The number of parents who answered that they knew the KCPE school mean score Dummy variable (1: Yes or 0: No) KCPE: the school mean score in the previous year in 2017 (Baseline) and 2018 (Endline)	
3. Correct awareness of KCPE score	The number of parents who have accurate perception on KCPE school mean score Dummy variable (1: Yes or 0: No) Parents who answered KCPE scores between -1 and +1 of actual KCPE school mean scores are judged as “correct” awareness and 1 is assigned. Parents who didn’t answered that they knew and the those who have inaccurate perception although they answered that they knew are judged as “incorrect” and 0 is assigned.	
4. Gender	Dummy variable (0: Male, 1: Female)	
5. Age	Age. Numeric values	
6. Meals per day	The number of meals parents feed in one day 4 scales in the number of meals at home per day during holidays in 2018 (Baseline) and 2019 (Endline) (0: None, 1: 1 time, 2: 2 times, 3: 3 times, 4: 4 times)	
7. Education level	The highest education level of parents themselves 5 scales (0. No school education, 1. Primary school, 2. Secondary school, 3. Polytechnics / Vocational School, 4. University / College)	Mother’s education level is used for eight female guardians. The mean value is assigned for the person who answered “I don’t know”.
8. Distance from home to school	Distance from parents’ home to their school 5 scales (1. 0-15 minutes, 2. 15-30 minutes, 3. 30-45 minutes, 4. 45minutes-1 hour, 5. More than 1 hour)	
9. Self-efficacy in participation	Parents’ self-reported efficacy in participation 5 scales in 2018 (Baseline) and 2019 (Endline). (1. I am not confident at all to participate in school meeting., 2. I am a little uncomfortable about participating in school meeting., 3. I do not know., 4. I feel somewhat confident to participate in school meeting., 5. I feel very confident to participate in school meeting.)	The mean value is assigned for three guardians who missed answering self-efficacy at the baseline. The mean value is assigned for two guardians who missed answering self-efficacy at the endline.
School-level variables		
10. KCPE school mean scores	The mean of KCPE school mean score for 2017 and 2018 at each school. Numeric values Parents in the same schools are assigned the same school-level values.	

第 27～28 回 アフリカ教育学会 大会プログラム等

【第 27 回】

1. 日時：2021 年 4 月 10 日（土）12 時 40 分～11 日（日）15 時 40 分
2. 場所：大阪大学（オンライン）
3. プログラム

4 月 10 日（土）

- 12:40-13:00 受付
- 13:00-13:05 開会の辞（大会実行委員長：澤村信英）
- 13:05-13:20 “Factors Promoting Parental Engagement in Early Child’s Learning: The case of Ghana”
Ryuto Minami (Kobe University)
- 13:20-13:35 “Teacher Effectiveness and Primary School Students’ Learning Achievement in
Burkina Faso” SOUBEIGA Abdoul-karim (Kobe University)
- 13:35-13:50 「ザンビアの理科教科書におけるプロセススキルの観点からみた—Science
Activity の分析」三浦広大（広島大学院生）
- 13:50-14:00 （休憩）
- 14:00-14:15 「アフリカの後発開発途上国出身元留学生の日本留学に対する意識調査」越
水未来子（桜美林大学院生）
- 14:15-14:30 「中国におけるザンビア人学生の教育から職業への移行—国境を超える高等
教育の役割に着目して—」羅方舟（大阪大学院生）
- 14:30-14:45 「アフリカにおける高等教育の地域統合と外部アクター」千葉美奈（早稲田
大学院生）
- 14:45-14:55 （休憩）
- 14:55-15:15 “Conventional Methods and Possibilities of Online Learning Methods for Formation of
Local Knowledge: A Case Study of JICA Training” Nanae Yasukawa (IC Net Limited),
Satoshi Kusaka (Naruto University of Education), Ayumi Oka (Hiroshima University),
Yoshikata Abe (Hiroshima University), Takuya Baba (Hiroshima University)
- 15:15-15:35 “Do Locally Sourced Solutions Hold Promise for Educational Improvement? Positive
Deviance Practices During COVID-19 School Closures in Uganda” Mikiko Nishimura
& Julius Favourite Atuhurra (International Christian University)
- 15:35-15:50 （休憩）
- 15:50-17:20 特別セッション：アフリカ教育研究におけるオンライン〈フィールドワーク〉
の可能性
話題提供者：ファンテナ・リアサ・アントリアニア付（大阪大学）、山崎瑛莉（上智大学）、
川口純（筑波大学）
討論者：馬場卓也（広島大学）、大場麻代（帝京大学）
進行：澤村信英（大阪大学）、ファンテナ・リアサ・アントリアニア付（大阪大学）
- 17:20-17:30 （休憩）

17:30-18:00 会員総会
18:00-18:30 (休憩)
18:30-20:00 オンライン情報交換会

4月11日(日)

08:40-09:00 受付
09:00-09:20 「コンタクト・ゾーンとしての周辺参加—ウガンダ都市零細金属加工業の学びの実践を事例に一」 山崎裕次郎 (名古屋大学院生)
09:20-09:40 「ベナン共和国における生きた「伝統文化」を継承する場としての学校—伝統宗教ヴォドゥン系小学校の教育実践を事例として—」 深堀聡子 (名古屋大学)
09:40-10:00 「教育格差の中にある格差—マラウイの初等教育への就学実態を事例に一」 川口純 (筑波大学)、丹羽勇人 (JBIC)
10:00-10:10 (休憩)
10:10-10:30 “Community and Parental Participation in Ugandan Public Primary Education: Cases of Bushenyi and Wakiso Districts” Takumi Kobayashi (Kobe University)
10:30-10:50 “Determinants of Household’s Expenditure on Pre-primary Education in Kenya” Ayumu Yagi (Kobe University)
10:50-11:10 “School to Work Transition in the Rural Area of Madagascar: Comparing Students’ Aspirations and Parents’ Perspectives” Fanantenana Rianasoa Andriariniaina (Osaka University)
11:10-11:20 (休憩)
11:20-11:40 “Locating Global Citizenship Education in the Context of Madagascar: Drawing from Rural School Stakeholders’ Views” Andriamanasina Rojoniaina Rasolonaivo (Osaka University)
11:40-12:00 “Exploring the Concepts of “Equality,” “Equity” and “Disparity” at School Education in the Republic of South Africa: A Case Study of Optionally Selected Grade 12 Life Orientation Textbooks” Masayasu Sakaguchi (Hyogo University of Teacher Education)
12:00-12:20 “System (In)Coherence: Quantifying the Alignment of Primary Education Curriculum Standards, Examinations, and Instruction in Two East African Countries” Julius Favourite Atuhurra (International Christian University) & Michelle Kaffenberger (Research on Improving Systems of Education)
12:20-13:00 (休憩)
13:00-13:20 “Conceptual Framework for Designing Lessons to Nurture STEM Literacy” Mamoru Tsurudome (Hiroshima University)
13:20-13:40 “Zambian Primary School Teachers’ Conceptual Understanding of Science Process Skills: Trends and Patterns” Mercy Mushani (Hiroshima University)
13:40-14:00 “Guided Participation as a Means of Classroom Interaction in Zambia: Observing Children’s Play” Nagisa Nakawa (Kanto Gakuin University)
14:00-14:10 (休憩)

- 14:10-14:30 “Influence of Women’s Level of Education on Their Knowledge, Attitude, and Practice to Control the Transmission of COVID-19 in The Democratic Republic of Congo”
Bernard Yungu Loleka (Kobe University)
- 14:30-14:50 “Language of Instruction and Students’ Learning Achievements in Anglophone and Francophone Sub-Saharan Africa: Empirical Evidence from Senegal and Zambia”
SANFO Mohamadou Bassirou Jean-Baptiste (Kobe University)
- 14:50-15:10 “The Effect of Inclusion of Refugees Into Local Government Schools on Children’s Reading and Math Skills: Evidence from West Nile, Uganda” Katsuki Sakaue (Waseda University)
- 15:10-15:25 最優秀発表審査・休憩
- 15:25-15:40 閉会の辞（会長：吉田和浩）

4. 実行委員会

委員長：澤村信英（大阪大学）

事務局長：Fanantenana Rianasoa Andriariniaina (Osaka University)

委員：Andriamanasina Rojoniaina Rasolonaivo (Osaka University),
Luo Fangzhou (Osaka University)

5. 受賞者

最優秀研究発表賞：Julius Favourite Atuhurra (International Christian University)

優秀研究発表賞：三浦広大（広島大学）、Fanantenana Rianasoa Andriariniaina
(Osaka University)

6. 参加人数（事前登録者）：56 名

【第 28 回】

1. 日時：2021 年 10 月 9 日（土）13 時 00 分～10 日（日）11 時 35 分
2. 場所：兵庫教育大学（オンライン）
3. プログラム

10 月 9 日（土）

- 12:40-13:00 受付
- 13:00-13:05 開会の辞（大会実行委員長：坂口真康）
- 13:05-13:20 「21 世紀の学校教育におけるアルゴリズム的思考に関する研究—ルワンダの中
学生が有するループ概念の困難性に着目して—」岡あゆみ（広島大学院生）
- 13:20-13:35 “Teacher Gender, Student Gender, and Learning Achievements in Primary Education
in Malawi” Yudai Ishii（神戸大学院生）
- 13:35-13:50 “The Influence of School Inputs on Student Learning Outcome in Primary School in
Malawi” Natsuki Kawakita（神戸大学院生）
- 13:50-14:00 （休憩）

- 14:00-14:20 「危機に立つ無認可私立学校の運営と教師の生活ーケニア・ナイロビのスラムで暮らし働く教師の日常の分析ー」 澤村信英（大阪大学）
- 14:20-14:40 “Practice of Communality through Extra-Curricular Activities: Citizenship in Secondary Schools in Dar es Salaam, Tanzania” Hitomi Tsukuda（所属なし）
- 14:40-15:00 “Possibilities of Positive Brain Drain and Negative Brain Circulation: a case study of Sudanese Student Mobility” Chiemi Kurokawa（広島大学院生）
- 15:00-15:10 （休憩）
- 15:10-17:00 特別セッション：共同・協働研究を軸としたアフリカ教育研究の展開
ーコロナ禍の「逆境」を乗り越えるための挑戦の記録ー
趣旨説明・進行：坂口真康（兵庫教育大学）
話題提供者：坂上勝基（神戸大学）、牧貴愛（広島大学）、川口純（筑波大学）、
大場麻代（帝京大学）、小川未空（大阪大学）、日下部達哉（広島大学）、ファンテナ・リアスア・アト・リアニアイ（大阪大学院生）
- 17:00-17:10 （休憩）
- 17:10-17:40 報告
- 17:40-18:00 （休憩）
- 18:00-19:30 オンライン情報交換会

10月10日（日）

- 08:40-09:00 受付
- 09:00-09:20 “Instructional Quality and Students’ Learning Achievements inequalities in Public and Private Primary Schools in Burkina Faso” Jean-Baptiste M.B. Sanfo（滋賀県立大学）
& Inoussa Malgoubri（ネブラスカ大学リンカーン校）
- 09:20-09:40 “Career plans and choices of African students in China: A case study of students at Zhejiang Normal University” Fangzhou Luo（大阪大学院生）
- 09:40-10:00 “Determinants of Schooling in The Democratic Republic of Congo: The Role of Women Intrahousehold Decision-Making Power” Bernard Yungu Loleka（神戸大学院生）
- 10:00-10:10 （休憩）
- 10:10-10:30 「アフリカ後発開発途上国出身留学生の日本留学後の進路に関する事例研究ーウガンダからの留学生を中心にー」 越水未来子（桜美林大学院生）
- 10:30-10:50 “Factors Hindering Access to Early Childhood Education in Uganda” Ayumu Yagi（神戸大学院生）
- 10:50-11:10 “Diversity of Maternal Employment Patterns and Children’s Literacy and Social-emotional Development Outcomes in Uganda” Shumin Li（神戸大学院生）
- 11:10-11:20 最優秀研究発表審査・休憩
- 11:20-11:35 講評・閉会の辞（会長：吉田和浩）

4. 実行委員会

委員長：坂口真康（兵庫教育大学）

委員：甲斐田真希（筑波大学）、細見奈生（筑波大学）、村上向日葵（筑波大学）

5. 受賞者

最優秀研究発表賞：佃瞳（所属なし）

優秀研究発表賞：岡あゆみ（広島大学院生）

Bernard Yungu Loleka（神戸大学院生）

6. 参加人数（事前登録者）：55 名

アフリカ教育学会会則

第1条（名称）

本会はアフリカ教育研究フォーラム (Africa Educational Research Forum) からアフリカ教育学会 (Japan Society for Africa Educational Research) と改称する。

第2条（事務局）

本会の事務局は、会長が所属する機関または会長が指名する場所に置く。

第3条（目的）

本会は、アフリカの教育についての研究および調査の推進を図り、会員相互の交流と協力によって、アフリカ教育研究の発展に努めることを目的とする。

第4条（事業）

本会は、前条の目的を達成するために、次の事業を行う。

- (1) アフリカおよびその周辺地域の教育についての研究および調査
- (2) 研究発表のための会合の開催
- (3) 雑誌「アフリカ教育研究」の刊行
- (4) 本会の目的を達成するために必要なその他の事業

第5条（会員）

1. 本会は、次の会員をもって組織する。
 - (1) 正会員：本会の目的に賛同する個人
 - (2) 学生会員：本会の目的に賛同する大学院生および学部学生
 - (3) 特殊会員：特殊な事情により、会費納入義務なしに会員の権利が与えられる個人
2. 理事会は以下の条件を満たしかつ本会の目的に賛同する個人を、特殊会員として承認できる。
 - (1) 本会の正会員または学生会員としての経歴を有し、日本以外の国・地域で活動する個人（大学院生および学部学生を含む）
 - (2) 本会の正会員としての経歴を有し、65歳以上で常勤職に就いていない個人
 - (3) その他、理事会が会費納入義務を免除できる特殊な事情があると認定した個人

第6条（会費）

1. 会員は定められた年会費（正会員：5,000円、学生会員：2,000円、特殊会員：免除）を納入しなければならない。納入された会費は返却しない。
2. 顧問は会費の納入を要しない。

第7条（会員の権利）

1. 会員は次の権利を有する。
 - (1) 本会が刊行する雑誌「アフリカ教育研究」に投稿する権利

- (2) 本会が開催する会合で、本会の目的に則った研究発表をする権利
- (3) 本会が行う研究および調査、その他の事業に参加する権利
- 2. 会費を滞納したものは完納するまで、当該年度に第1項に定める権利を停止される。

第8条（入退会）

- 1. 会員になろうとする者は所定の申込手続きを行い、理事会の承認を受けなければならない。
- 2. 会員は、以下の理由で資格を失う。
 - (1) 本人が書面で退会を会長に申し出た
 - (2) 会費を1年間滞納した
 - (3) 本会の名誉を傷つける行為があったため、理事会が退会と決定した
 - (4) 本人が死亡した
- 3. 前項第1号の理由で退会する会員は、退会する年度までの会費を完納しなければならない。
- 4. 第2項第2号の理由で退会した個人は、第1項に定める手続きを経て再入会できる。

第9条（役員）

- 1. 本会に以下の役員を置く。
 - (1) 会長 1名
 - (2) 副会長 1名
 - (3) 事務局長 1名
 - (4) 理事 12名程度（会長、副会長および事務局長を含む）
 - (5) 顧問 若干名
 - (6) 幹事 若干名
 - (7) 監査役 2名
- 2. 役員の任期は2年とし、再任を妨げない。

第10条（役員の選出）

- 1. 理事は正会員から選出される。
- 2. 会長、副会長および事務局長は理事会において互選により決める。
- 3. 顧問は本会に特別の功労のあったものを理事会が選出し、会長が委嘱する。
- 4. 幹事は理事会が決め、会長が委嘱する。
- 5. 監査役は理事会が選考し、会長が委嘱する。

第11条（役員の任務）

- 1. 会長は本会を代表して会務を総括し、理事会の議長を務める。
- 2. 副会長は会長を補佐し、会長の不在あるいは事故のある時にその職務を代行する。
- 3. 事務局長は、会長、副会長を補佐し、事務局を統括し、日常の会務を執行する。
- 4. 理事は理事会を構成し、本会の組織運営、会則の改廃などに関わる事項の審議を行う。
- 5. 顧問は本会の運営等に関する事項について会長の諮問に応じる。

6. 幹事は本会の主に会計処理につき事務局長を補佐する。
7. 監査役は本会の会計を監査する。

第 12 条（会の運営）

本会の運営は本会則による。理事会は細則を定めることができる。

第 13 条（会議）

1. 理事会は、次の事項の議案の承認と決議を行う。
 - (1) 事業計画および事業報告
 - (2) 予算、決算および会計監査報告
 - (3) 役員の選出
 - (4) 会則の変更
 - (5) その他
2. 会長は会員総会において理事会の決定事項を報告する。
3. 会員総会は通常毎年一回開催する。

第 14 条（会計）

1. 本会の運営および事業は次の資産によって行う。
 - (1) 会費
 - (2) 事業に伴う収入
 - (3) 寄付金
 - (4) その他の収入
2. 本会の会計年度は、毎年 4 月 1 日にはじまり翌年 3 月 31 日におわる。
3. 本会の会計処理は、事務局長が責任を持つ。
4. 監査役は、理事会に会計監査報告を行い、承認を受けなければならない。

第 15 条（学会賞の規定）

学会賞については、別途定めることとする。

第 16 条（会則の改正）

この会則を改正するときは、理事会での審議を経て、会員総会に報告する。

附則

本会則は、平成 20 年（2008 年）4 月 18 日から施行する。

附則

本会則は、平成 31 年（2019 年）4 月 13 日から施行する。

Japan Society for Africa Educational Research Bylaws

Article 1. Name of the Organization

The name of this organization shall be changed to Japan Society for Africa Educational Research from Africa Educational Research Forum.

Article 2. Executive Office

The Executive Office is established at an institution where the President belongs or at an institution appointed by the President.

Article 3. Purposes

The Society aims to contribute to the development and promotion of the field of Africa Educational Research and to advance studies and fieldwork about African education through regional and international networks and collaborations among the members.

Article 4. Activities

In order to accomplish the aforementioned purposes, the Society engages in the following activities:

- 1) Studies and fieldwork about education in and around SSA
- 2) Hosting conferences for research presentations
- 3) Publishing 'Africa Educational Research Journal'
- 4) Other duties essential to accomplishing the purpose of the Society

Article 5. Membership

1. The Society shall consist and be organized by the members below.
 - 1) Regular members: individuals who support the purpose of the Forum
 - 2) Student members: graduate and undergraduate students who support the purpose of the Forum
 - 3) Special members: individuals who are given rights of membership without payment of membership dues in case of special circumstances
2. The Board of Directors can approve individuals who support the purpose of the Society and fulfill the following conditions as special members.
 - 1) Individuals who were regular or student members and work outside Japan. (including undergraduate and graduate students)
 - 2) Individuals over 65 years old who were regular members and do not take a full-time position.
 - 3) Individuals who are approved for exemption of the membership dues by the Board of Directors due to special circumstances

Article 6. Membership dues

1. Members are responsible for annual membership dues: ¥5,000 for regular members, ¥2,000 for student members, free for special members. Membership dues are non-refundable.
2. The Advisor shall be exempt from membership dues.

Article 7. Entitlement of Membership

1. Members are entitled to:
 - 1) submit a paper to 'Africa Educational Research Journal'
 - 2) apply for presentations at academic meetings organized by the Society
 - 3) participate in studies, fieldwork and other activities sponsored by the Society
2. A person who defaults in payment of the membership dues shall be suspended entitlements written in clause 1.

Article 8. Admission and withdrawal

1. Individuals may become members by following the designated procedures for application and receiving approval from the Board of Directors.
2. Membership shall expire when:
 - 1) the person submits a notice of withdrawal to the President.
 - 2) annual membership dues in arrears for that year is unpaid.
 - 3) the Board of Directors decides to terminate the membership of members who act with malice and/or inflict damages to the Society.
 - 4) the person dies.
3. A person who withdraws by reason of clause 2. 1) must pay membership dues completely until the year of withdrawal.
4. A person who withdrew by reason of clause 2. 2) can apply re-admission by following the procedures written in clause 1.

Article 9. Administrative Board

1. The Administrative Board shall be composed of the following officers:
 - 1) President (1)
 - 2) Vice President (1)
 - 3) Executive Director (1)
 - 4) Directors (about 12 including President, Vice President, and Executive Director)
 - 5) Advisor (few)
 - 6) Secretary (few)
 - 7) Auditor (2)
2. The Administrative Board shall be elected for a term of two years and may be re-elected for multiple terms.

Article 10. Election of the Administrative Board

1. The Directors shall be elected from among regular members.
2. The President, the Vice President, and the Executive Director shall be elected by mutual vote among the members of the Board of Directors.
3. The Advisor shall be as a person who has provided special distinguished service to the Society, elected by the Board of Directors and appointed by the President.
4. Upon decision by the Board of Directors, the President shall appoint the Secretary.
5. Upon election by the Board of Directors, the President shall appoint the Auditor.

Article 11. Responsibilities of the Administrative Board

1. The President shall represent the Society, superintend the programs of the Society and act as chairperson of the Board of Directors.
2. The Vice President shall assist the President. If a vacancy by the President occurs for any reason, the Vice President shall perform duties usually retained by the President.
3. The Executive Director shall assist the President and the Vice President, superintend the programs of the Executive Office and perform daily affairs for the Society.
4. The Directors shall constitute the Board of Directors and discuss certain matters involving reforming the Bylaws and the management of the Society, etc.
5. The Advisor shall give advice to the President on important questions about the management of the Society.
6. The Secretary shall assist the Executive Director mainly in finances and accounting of the Society.
7. The Auditor shall audit the Society's financial statements.

Article 12. Management of the Society

Management of the Society is based on the Bylaws. The Board of Directors shall administer the Detailed Provision.

Article 13. Meeting

1. The Board of Directors decides and approves matters as below.
 - 1) Plans and results of activities
 - 2) Budget and settlement, financial report by Auditor
 - 3) Election of the Administrative Board
 - 4) Amendment of the Bylaws
 - 5) Others
2. The President shall report the decisions of the Board of Directors at the General Membership Meeting.
3. The General Membership Meeting shall be commonly held once a year.

Article 14. Finances and Accounting

1. The management and activities of the Society shall be funded by:
 - 1) Membership dues
 - 2) Income associated with activities
 - 3) Donation
 - 4) Other additional income
2. The Society's financial and accounting records shall begin on April 1 each year and end on March 31 of the following year.
3. The Executive Director is responsible for the finances and the accounting of the Society.
4. The financial report provided by the Auditor, shall be approved by the Board of Directors.

Article 15. Award Provision

Academic award provision shall be prescribed separately.

Article 16. Amendment of the Bylaws

These Bylaws shall be amended upon approval by the Board of Directors. The amendment shall be reported at the General Membership Meeting.

Supplementary Provisions

The Bylaws shall be effective from April 18, 2008.

Supplementary Provisions (Amended on April 12, 2019)

The Bylaws shall be effective from April 12, 2019.

2021 年 12 月 23 日

「アフリカ教育研究」刊行規程

（目的・名称）

1. アフリカ教育学会（以下、学会という）における、アフリカの教育に関する研究の成果を公表し、アフリカの教育研究の推進に資するために「アフリカ教育研究」（Africa Educational Research Journal）を刊行する。

（編集委員会）

2. 「アフリカ教育研究」（以下、研究誌という）の編集は、編集委員会が行う。編集委員は学会員 8 名程度をもって構成し、編集委員長は、委員の互選による。その任期は 2 年とし、再任を妨げない。

（掲載論文等の種類）

3. 研究誌に掲載する論文等の分類は、以下のとおりとする。
（1）原著論文 （2）研究ノート （3）調査報告
投稿原稿をどの種類に分類するかについては、編集委員会が決定する。

（投稿資格）

4. 学会会員および編集委員会が認めた者は、投稿資格を有する。

（連名での投稿）

5. 4. に定める投稿有資格者が第一著者である場合に限り、連名で投稿することができる。

（投稿件数）

6. 原則として一人 1 篇とする。ただし、連名での投稿を含む場合は 2 篇までとする。

（査読）

7. 投稿原稿は、編集委員会が審査を行い、採否を決定する。審査にあたっては、1 原稿ごとに 2 名の査読者を選定し、その結果を参考にする。

（刊行回数）

8. 原則として年 1 回とする。

（その他）

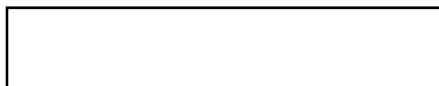
9. 執筆要領等、その他の必要事項については、編集委員会において定める。

「アフリカ教育研究」執筆要領

「アフリカ教育研究」編集委員会

- (1) 論文等の内容は、サブサハラ・アフリカおよびその周辺地域の教育に関するものとする。
- (2) 論文等は、未発表のものに限る。ただし、口頭発表はこの限りではない。
- (3) 使用言語は、日本語または英語とする。
- (4) 原稿は所定のテンプレートを使用して作成し、12 枚以内を原則とする。英文原稿は英文版執筆要領 (Notes to contributors) に従うこととする。
- (5) 執筆者名・所属・謝辞欄については編集せず、別紙に論文題目 (和文および英文)、所属機関名、執筆者名 (日本語および英語表記)、連絡先 (電子メール、住所、電話) を明記する。
- (6) 図表、注記および参考文献の書き方などは、次のとおりとする。
 - ① 本文の区分は、次のようにする。
 - 1.
 - 1.1.
 - (1)
 - ② 図表は完全な原図を作成する。出所を明記し、タイトルは図の下あるいは表の上に入れる。

表 1 ケニアの初等教育就学率



(注)
(出所)



図 1 ガーナの中等教育就学率
(注)
(出所)

- ③ 本文における文献引用は、以下のとおりとする。

「・・・である」(内海 2010, 12 頁) という指摘がある。
・・・と考えられている (小川・西村 2008; 小澤ほか 2008; 馬場 2009)。
黒田 (2008) は・・・。
なお、英語文献の場合は、
「・・・である」(Utsumi, 2010, p. 12) という指摘がある。
・・・と考えられている (Kitamura, 2007; Sifuna & Sawamura, 2008; Sifuna et al., 2015)。
King (2008) は・・・。
- ④ 注記、参考文献は、テンプレートの指示に従って、論文末に一括掲載する。
- ⑤ 参考文献の書き方については、以下のとおりとする。以下に例示に該当がない場合は、バックナンバーなども参照し適切にスタイルを揃えて示す。

単行本：

山田肖子（2009）『国際協力と学校—アフリカにおけるまなびの現場—』創成社。
小川啓一・西村幹子編（2008）『途上国における基礎教育支援—国際的潮流と日本の援助—』学文社。

吉田和浩（2005）「高等教育」黒田一雄・横関祐見子編『国際教育開発論—理論と実践—』有斐閣、121-140 頁。

Sifuna, D. N. & Sawamura, N. (2010). *Challenges of Quality Education in Sub-Saharan African Countries*. Nova Science Publishers.

Kitamura, Y. (2007). The Political Dimension of International Cooperation in Education: Mechanisms of Global Governance to Promote Education for All. In D. Baker & A. Wiseman (eds.), *Education for All: Global Promises, National Challenges*. Oxford: Elsevier, pp. 33-74.

Sifuna, D. N., Sawamura, N., Shimada, K. & Malenya, F. L. (2015). UPE Policy and Quality of Education in Kenya. In K. Ogawa & M. Nishimura (eds.), *Comparative Analysis on Universal Primary Education Policy and Practice in Sub-Saharan Africa*. Brill, pp. 135-153.

雑誌論文：

小澤大成・小野由美子・近森憲助・喜多雅一（2008）「アフリカの大学による基礎教育開発に資する自立的研究への支援—ウガンダにおける事例—」『国際教育協力研究』3 号、11-16 頁。

King, K. (2000). Towards knowledge-based aid: a new way of working or a new North-South divide? *Journal of International Cooperation in Education*, 3(2), 23-48.
<http://doi.org/10.15027/34134>

（7）原稿は完全原稿とし、著者校正は原則として初校のみとする。

投稿手続・日程

- （1）投稿の際は、原著論文、研究ノート、調査報告の別を明記する。
- （2）投稿希望者は、次の投稿申込日までに論文の仮題目および著者名を明記し編集事務局に、電子メールで申し込み、原稿締切日までに添付ファイルで完成原稿を提出する。
[投稿申込締切日：毎年3月31日、原稿締切日：毎年5月31日]

編集事務局（投稿・問合せ先）

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澤村信英研究室気付

E-mail: aerjedit@gmail.com

Africa Educational Research Journal: Regulations for the Publication

1. Purpose and name

The Africa Educational Research Journal (hereinafter referred to as the Journal) is issued to disseminate the results of research on African education conducted within the Japan Society for Africa Educational Research (hereinafter referred to as the Society) and to contribute to the promotion of educational research in Africa.

2. Editorial Board

The Editorial Board is responsible for editing the Journal. The Editorial Board consists of approximately eight members of the Society, and the editor in chief is elected by the editorial board members for two years with the possibility of reappointment.

3. Paper category

The classification of papers to be published in the Journal is as follows:

(1) Articles (2) Research notes (3) Research reports

The Editorial Board will decide the classification of submitted manuscripts.

4. Submission Requirements

Only members of the Society and authors invited by the Editorial Board are eligible to contribute.

5. Submissions in joint names

Joint authors may submit manuscripts only if the first author is one of the qualified authors specified in 4.

6. Number of submissions

As a general rule, submission is limited to one paper per person. However, two submissions are possible if the person is a co-author in one or both of the papers.

7. Peer review

Manuscripts will be reviewed by the Editorial Board to determine acceptance or rejection. In the review process, two anonymous referees will be selected for each manuscript and the Editorial Board will make the decision based on their reviews.

8. Number of publications

In principle, once a year.

9. Others

The Editorial Board shall determine the writing guidelines and other requirements.

Africa Educational Research Journal: Notes to contributors

Editorial Board of the Africa Educational Research Journal

1. The content of the paper should be related to education in sub-Saharan Africa and its surrounding regions.
2. The manuscript must be unpublished, except for oral presentations.
3. The manuscript should be either in Japanese or English. Authors can use either American or British English as long as consistency is maintained. For Japanese manuscripts, please refer to the guidelines in Japanese.
4. The manuscript should not exceed 12 pages including titles, figures, tables, and references, using the designated template.
5. Please do not fill in identifiable information (authors' names, affiliations, and acknowledgments). The title of the paper, the name of the institution to which the authors belong, the name of the authors, and contact information (e-mail, address, and telephone) should be clearly indicated in a separate file.
6. Please use the template to format the manuscript. As an indication, headings, figures, tables, notes, and references should be written as follows.

(1) The headings

- 1.
- 1.1.
- 1.1.1.

- (2) Figures should be in their final versions and of high quality. The source should be clearly indicated and the title should be placed below the figure and above the table.

Table 1. Primary Education Enrollment Rates in Kenya

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Notes:
Source:

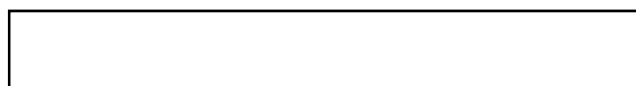


Figure 1. Secondary education enrollment rate in Ghana

Notes:
Source:

- (3) Citations in the text should use author-date style as follows:

(...) A number of studies showed that “(...) and demonstrated its importance to such understanding” (Utsumi, 2010, p. 12). (...) and previous studies proved its crucial role (Kitamura, 2007; Sifuna & Sawamura, 2008; Sifuna et al., 2015). King (2008) showed that (...).

- (4) Notes and references should be listed together at the end of the paper following the instructions in the template.

(5) Please list the references based on the following examples and refer to papers in previous issues if you do not find your particular use case.

Books

Sifuna, D. N. & Sawamura, N. (2010). *Challenges of Quality Education in Sub-Saharan African Countries*. Nova Science Publishers.

Kitamura, Y. (2007). The Political Dimension of International Cooperation in Education: Mechanisms of Global Governance to Promote Education for All. In D. Baker & A. Wiseman (eds.), *Education for All: Global Promises, National Challenges*. Oxford: Elsevier, pp. 33-74.

Sifuna, D. N., Sawamura, N., Shimada, K. & Malenya, F. L. (2015). UPE Policy and Quality of Education in Kenya. In K. Ogawa & M. Nishimura (eds.) *Comparative Analysis on Universal Primary Education Policy and Practice in Sub-Saharan Africa*. Brill, pp. 135-153

Journal Articles

King, K. (2000). Towards Knowledge-Based Aid: A New Way of Working or a New North-South Divide? *Journal of International Cooperation in Education*, 3(2), 23-48. <http://doi.org/10.15027/34134>

(6) The manuscript should be a finalized document following the standards for academic publication. In principle, the author(s) will be allowed to edit the manuscript only once before publication.

8. Submission Procedure and Schedule

- (1) When submitting a manuscript, clearly indicate whether it is an article, a research note, or a research report (however, please note that the Editorial Board will decide the final classification of submitted manuscripts).
- (2) For submission, please send an application to the Editorial Office by e-mail, stating the tentative title of the paper and the names of the authors by the following submission dates, and submit the manuscript as an attached file by the deadline.
 - Deadline for submission application: 31 March
 - Deadline for manuscript submission: 31 May

AERJ Editorial Office (for submissions and inquiries)

c/o Nobuhide Sawamura

Graduate School of Human Sciences, Osaka University

1-2 Yamadaoka, Suita, Osaka 565-0871, Japan

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編集後記

第12号をお届けします。前号からは冊子体で発行せず、完全オンライン・ジャーナルとなりました。また、学会HPでは創刊号から各号の全頁を掲載しておりますが、J-Stage上でもすべての論文がご覧いただけるようになりました。

今号の特集は、第28回大会（2021年10月、兵庫教育大学（オンライン）開催）での特別セッション「共同・協働研究を軸としたアフリカ教育研究の展開—コロナ禍の「逆境」を乗り越えるための挑戦の記録—」をベースとしています。大会実行委員長の坂口真康先生に特集論文「コロナ禍における比較国際教育研究の新展開」の執筆経験を振り返る座談会の企画を打診したところ、快く引き受けてくださり、司会から原稿の取りまとめも行っていました。特集論文の内容には表れてこない、それぞれの感想や率直な意見交換がされていますので、是非ご一読いただけますと幸いです。

一般投稿については、査読を経て、原著論文として1編を採択することができました。投稿は5編あり、5編すべての論文に対して「大幅な修正の上、採否を再検討」としてフィードバックしましたが、4篇の著者が修正を辞退されました。厳しいコメントが多かったとはいえ、編集委員会および査読者の期待を考えると残念なことでした。

ところで、編集委員会の委員は、前号と変更はありませんが、編集幹事としてアントリアニエ・ファンテナ・リアス（通称リナ）さんに加わっていただきました。とくに今号に掲載された論文は、すべてが英文でしたので、大活躍してもらったことになりました。

末筆ながら、引き続きまして、会員の皆さまからの投稿をお待ちしています。ご不明な点やご要望などがございましたら、ご遠慮なく編集事務局までご連絡ください。

（澤村）

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