

The bedrock of inclusion: why investing in the education workforce is critical to the delivery of SDG4

MALAWI RESEARCH SUMMARY

March 2021

This document summarises key findings research carried out in Malawi, as part of a multi-country study undertaken on behalf of [ActionAid](#), [Education International](#), and [Light for the World](#). The research explores the current state of investment in the education workforce for disability-inclusive education and investigates what is realistically required for putting inclusive education into practice. Full reports can be accessed [here](#).

Despite government commitments to inclusive education, children with disabilities remain largely excluded

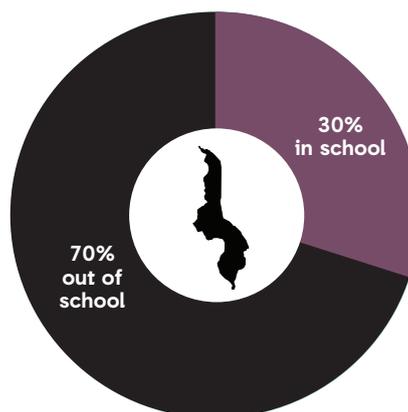
The Malawian Government has ratified the UN Convention on the Rights of Persons with Disabilities (UNCPRD), and developed several laws and policies to promote, fulfil and protect the rights of persons with disabilities. Despite these commitments, children with disabilities remain largely excluded. The 2018/19 Education Sector Performance Report indicates that children with special educational needs represent:

- 3.3% of total enrolments at primary school
- 2.4% of total enrolments at secondary level.¹

Despite the lack of data regarding the nature of these children's special needs, comparing these percentages to total enrolment figures suggests that an estimated 183,916 children with special needs were in school in 2018/19, (174,851 at primary and 9,065 at secondary). In other words, roughly 30% of the total number of 5-19-year-olds estimated to have a disability.¹

There are no further figures or estimates on children with disabilities, making it difficult to estimate real needs for policy and planning.

Children with disabilities in/out of school.



Malawi's massive teacher shortage is a major barrier to inclusive education

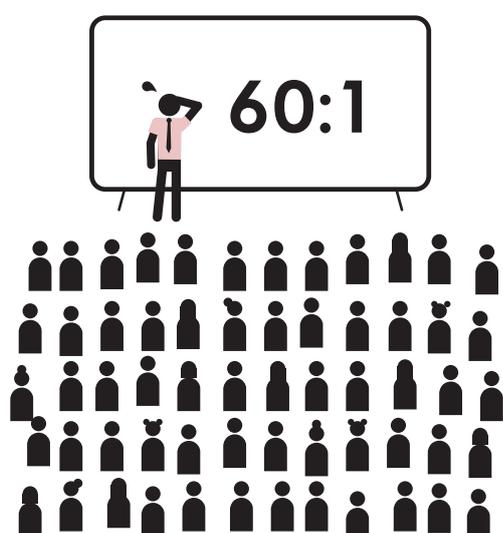
One of the biggest barriers to inclusive education in Malawi is the lack of teachers trained in inclusive or special needs education, compounded by a severe and persistent shortage of qualified teachers overall.ⁱⁱ Malawi has one of the "most dramatic teacher shortages" in the world, equivalent to 2% of global teacher posts standing empty.ⁱⁱⁱ

1. Author's calculations based on data from national census, and national enrolment data.

- The average pupil-to-qualified teacher ratio in primary school was 70:1,^{iv} but this varies across the country, from 45:1 in urban Zomba to 84:1 in Machinga,^v
- To reach its target pupil-teacher ratio of 60:1 by 2030, (already much higher than the UNESCO recommended maximum of 40:1) Malawi needs an additional 82,461 teachers (44,205 at primary and 38,256 at secondary).^{vi}
- The current structure of incentives and wages in Malawi does little to attract or retain teachers in the profession, or encourage greater equity in deployment, getting teachers to where they are most needed.



PHOTO: SAMANTHA REINDERS/ACTIONAID



The Ministry of Education estimates that, in order to reach its target pupil-teacher ratio of **60:1 by 2030**, an additional **82,461** teachers are needed

Training a workforce to support inclusion.

To date, there has not been a comprehensive approach to the training of teachers to practice inclusion, which has been delivered as a patchwork of small trainings, largely funded by donors.

- Few colleges train in inclusive methods and few lecturers have knowledge and skills on inclusive education; curricula are limited.
- New recruits to special needs/inclusive teaching often specialise in specific types of disability. This can encourage continued segregation (e.g. in schools for the blind), creating a problem for scaling up inclusive education, and maintaining the emphasis on special needs education.

- In-service professional development opportunities and incentives for practicing teachers to take up inclusive education training opportunities are inadequate.

The new NESIP tackles some of these challenges with plans to:

- Construct 14 new teacher training colleges by 2029, and a stand-alone Teacher Training Institute of Inclusive Education by 2024.
- Enrol 35,025 teachers in teacher training colleges by 2029 (26,774 primary and 8,251 secondary).
- By the end of 5 years, have 35,000 teachers trained in inclusive education, 27,500 trained in the assessment of learners with diverse needs, 7,500 trained in braille, 4,000 trained in sign language and 2,800 trained in the maintenance of assistive devices.
- Improve data on teacher training and ensure the availability of timely teacher education data linked to the EMIS through the Teacher Education Management Information System.

Education is the Government's top spending priority, however resources are insufficient to deliver inclusive education

Fully responding to these needs and transforming the workforce for system-wide inclusive education, will require a huge scale-up of financing and substantial increases to public budgets. This can be supported by applying ActionAid's "4S education financing framework" and increasing the share, size, sensitivity and scrutiny of the public budget to ensure adequate resources to meet SDG4 are being allocated and spent.

SHARE: Malawi allocates a good proportion of its budget and GDP to education, but this is still insufficient

Education has consistently been one of the Government’s top spending priorities, which is highly commended.

- In 2018/19, the Government of Malawi allocated 23.5% of the total budget, or 6% of GDP, to education.^{vii}
- Recently the share of the budget and GDP allocated to education have risen to the upper end of the recommended international benchmarks of 15-20% and 4-6% respectively.^{viii}

This level of prioritisation will be required for some years to come:

- A costing model for SDG4 noted that, in the short term, Malawi needs to spend considerably above 6% of its GDP on education to meet the twin targets of equity and quality, while dealing with increased demand.
- A huge expansion of children coming into education is anticipated, due to a very young population and more children staying on to complete lower-secondary.^{ix}

The Malawi education budget is highly dependent on development partner support, which in 2012 contributed up to 40% of the total.^x Although this has reduced in

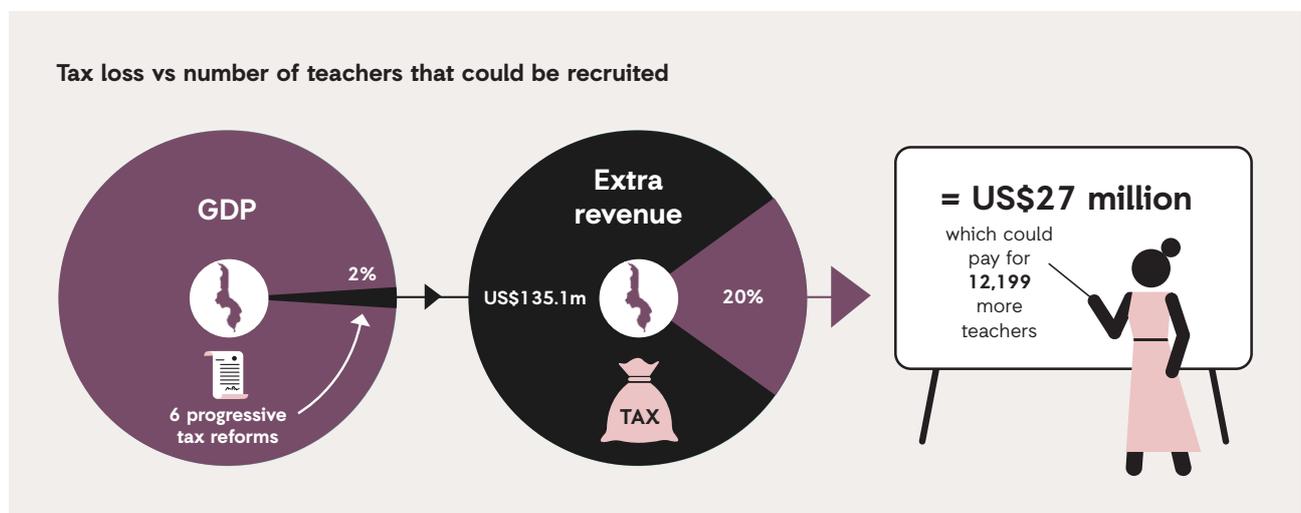
recent years, not least following a financial scandal in 2013,² donors have a big role in development (capital) budgets. In 2018, the MK 22 billion contribution from international donors (7.5% of the total education budget) was earmarked for development projects.^{xi}

Given that Malawi is currently spending around 20% of revenue on debt servicing,^{xii} fiscal space for education remains very limited leading to continued dependence on donors for non-wage expenditure. Overseas Development Aid (ODA) will be even more important for the education sector to mitigate against the global financial downturn brought on by the Covid-19 pandemic and ensure progress towards SDG4 is not irrevocably reversed. Equally, the pandemic is expected to put significant pressure on aid budgets as donor governments struggle to respond to the economic crisis.^{xiii}

The government of Malawi must therefore work harder to protect allocations to education, by raising more funds through progressive domestic resource mobilisation and tackling debt.

SIZE: Insufficient revenue collection reduces public funds for inclusive education

Although Malawi already allocates a very high share of its budget and GDP to education, more is needed to achieve SDG4 targets, requiring a focus on both education spending (funding) and overall revenues (financing).



2. For more information <https://www.economist.com/baobab/2014/02/27/the-32m-heist>

- Although Malawi already spends a very large proportions of its budget on education, it cannot resolve the education crisis without increasing the size of the overall government budget.
- Actual amounts allocated to education are limited by the low tax-to-GDP ratio.
- Although this ratio rose from 13% in 2012 to above 17% in 2017, the trend started to reverse in 2018.^{xiv} While this compares well to the average sub-Saharan Africa ratio of 17.2%,^{xv} It is still only just above the minimum threshold of 15% considered necessary to finance even the most basic of state functions.
xvi, xvii
- Disparities in teacher deployment and infrastructure provision leave most remote, rural areas struggling to attract qualified teachers
- Huge variations in per capita allocations to district councils and secondary schools points to inequitable budget allocations and outdated disbursement formulae.^{xx}
- Malawi has a pro-rich distribution of spending,^{xxi} which has historically been highly skewed towards tertiary education.^{xxii} This has improved in recent years,⁶ but given that more than 90% of students at tertiary level are from the wealthiest 20% of families,^{xxiii} subsidies to higher education in Malawi perpetuate wider inequalities.

Urgent actions are required to reverse this trend by taking concrete measures such as eliminating harmful tax exemptions.

- In 2018, ActionAid estimated that Malawi lost US\$ 87 million revenue in 2015/16 to tax incentives and tax treaties.^{xviii} That's more than double the costings in the NSIE over five years.³
- In 2020, further research demonstrated that just six progressive tax reforms could significantly increase revenue generation in Malawi.^{xix} The proposed reforms⁴ could translate into a 2% increase in Malawi's tax-to-GDP ratio in 2017, amounting to an estimated US\$ 135.1 million. Just 20% of this (around US\$ 27million) would be enough to pay entry-level salaries for 12,199 much-needed newly qualified teachers, around 27% of the total number of primary school teachers needed by 2030 and around 35% of the total number of teachers expected to be trained in inclusive education by 2025.⁵

SENSITIVE: Budgets need to better address inequalities to support inclusion

Addressing inequity in spending is particularly important for inclusive education.

Supporting the move to inclusive education requires a much sharper focus on budget sensitivity.

SCRUTINY: Budget allocations to inclusion require greater scrutiny to ensure that plans are realistic and on track

The new NESIP (2020-2030) considers inclusion as a cross-cutting element of the overall education plan, but also includes a relatively detailed breakdown of specific line items aimed at promoting inclusive education, and disability-inclusion in particular. This will make spending on inclusion easier to track and monitor. However, timelines and targets in the results framework and the implementation plan do not always match up.⁷ Given that the NESIP period is for 2020-2029 and the NSIE is ending in 2021, more remains to be done to ensure that plans, budgets and targets for inclusion-related actions and expenditure are both harmonised and realistic. Civil society engagement and scrutiny will be key to ensuring accountability, and that planned actions are delivered and contribute to improved outcomes.

3. Authors own calculations, based on NSIE costings in report of an estimated US\$ 29.3 million.
4. Focussing on personal and corporate income and incentives, property and luxury goods
5. This estimate, for advocacy purposes is based on information obtained regarding current teacher salary scales effective 1st July 2018 which notes that the monthly salary for a teacher on grade L1 is MWK136,078. This would add up to MK1,632,936 per annum (around US\$2,213 using average US\$ to MWK exchange rates for 2020).
6. The latest budget figures show this to be split as 47% to basic education (primary); 11.5% to secondary and 36% to higher education. From UNICEF (2019). National Budget Brief 2018/19.
7. The NESIP period is 2020-2029 and the NSIE ends in 2021

CONCLUSIONS AND RECOMMENDATIONS

Ambitious plans such as those outlined in the new NESIP 2020-2030 must be sustained by the necessary resources and championed across the whole system, from policy makers to the education workforce. However, a huge part of implementing the strategy must be ensuring that the right resources (human and financial) are in place. The inconvenient truth is that Malawi will only achieve truly inclusive education when it takes the necessary steps to reduce the staggeringly high pupil-teacher ratios, and allocates enough funds to ensure that a fully trained workforce is recruited, trained, deployed and supported.

As such the research recommends that the Government of Malawi will:

- 1. Continue to embed inclusive education into policy planning, budgeting and monitoring.**
- 2. Ensure more robust and accurate data to improve planning and budgeting for inclusive education and monitoring change.**
- 3. Address the high pupil-teacher ratios which prevent teachers from practicing inclusion in the classroom, strengthening equitable teacher deployment.**
- 4. Develop a workforce that can practice inclusion, including transforming training to equip teachers to practice inclusion.**
- 5. Support teachers through improving the resource-centre system of inclusive education delivery.**
- 6. Carry-out credible costings for supporting inclusive education, including education workforce development.**
- 7. Raise significant new funds for education to transform education systems and the teaching force for inclusion. In Malawi this requires:**
 - **Maintaining the share of the budget at current high levels of over 20%.** Ensure frontloading of the investments required to scale-up education to meet the 2030 targets, notably ongoing investments in the education workforce. Manage pressure from debt servicing so as not to erode these investments. This in turn will require the IMF to ensure that its advice to the country does not counter their commitment to social spending.
 - **Increase the size of domestic revenue, and hence government budgets overall.** Enable increased commitments to education by action to widen the tax base in progressive ways and increase the tax-to-GDP ratio. Adopt measures to build more a progressive tax system, including stopping the allocation of harmful corporate tax incentives and using tax incentives selectively and strategically to facilitate national development.
 - **Improve the sensitivity of the budget to support inclusion.** Ensure more equitable allocations to schools, including factoring in spending formulae that address disadvantage such as disability. Ensure that allocation distributions respond to pupil-teacher ratios and incentivise staff to work in disadvantaged areas.
 - **Enable scrutiny of current and future budgets and expenditure for inclusive education.** Ensure plans, budgets and targets for inclusive education are harmonised across different education strategy and policy documents.

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 - ii. UNESCO (2014) Global Monitoring Report 2013/14. Teaching and learning: Achieving quality for all
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 - ix. UNESCO (2015) Global Education Monitoring Report: Reaching education targets in low and lower middle income countries: Costs and finance gaps to 2030 for pre-primary, primary, lower- and upper secondary schooling
 - x. MoEST (2013) Education Sector Implementation Plan (2013– 18)
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 - xiv. See: <https://data.worldbank.org/indicator/GC.TAX.TOTL.GD.ZS?locations=MW&view=chart>
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 - xvi. Gaspar, V. et al.(2019) Fiscal Policy and Development: Human, Social and Physical Investment for the SDGs, IMF Staff Discussion Note
 - xvii. <https://blogs.worldbank.org/governance/getting-15-percent-addressing-largest-tax-gaps>
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Contact Us

Address: ART Business Park Unit 3-5 | Behind Kaunda-Puma Filling Station | P.O. Box 30735 | Lilongwe 3

Tel: +265 (0) 1 759 861 **Cell:** +265 (0) 1 759 865 **Fax:** +265 (0) 1 755963

http://malawi.actionaid.org **Email:** aamalawi@actionaid.org



@actionaidmalawi