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Measuring Gender inequality and equality in education[2] -

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Introduction

Since 1995, considerable expertise has built up in measuring aspects of gender inequality and equality, and in researching these in education, particularly formal schooling[3]. Existing international and national measures used for reporting on gender in formal schooling[4] chart gender parity in school enrolment, attendance, progression, and learning outcomes. Gender parity measures the number of girls as a proportion of the number of boys. This measure generates some insights regarding the distribution and use of resources, but it is narrow. However, gender parity as a measurement technique tells us very little about the institutions which help reproduce gender inequalities within and beyond education. It also fails to give us a sense of the dimensions of gender equality, and the processes and investments in schooling which will develop, support and sustain this. Thus it does not generate sufficiently multi-dimensional insights for policy makers and practitioners with regard to where gender inequalities and equalities are located in education and how change in these processes can be evaluated and tracked using quantitative and qualitative information and a range of strategies for measurement.

The revised frameworks for EFA in the 2030 education agenda and the draft of the SDGs give a central position to gender equality. The draft SDG Declaration contains an overarching commitment 'to protect human rights and promote gender equality and the empowerment of women and girls' (UN DESA, 2015). The education goal includes an aim to develop knowledge and skills of gender equality (4.7) and upgrading education facilities to make them gender sensitive (4.8). The Incheon EFA Declaration recognizes ' the importance of gender equality in achieving the right to education for all… supporting gender-sensitive policies, planning and learning environments; mainstreaming gender issues in teacher training and curricula; and eliminating gender-based discrimination and violence in schools' (World Education Forum, 2015). Both of these documents require us to revisit the question of measuring and evaluating gender inequality and equality in education at the international, national and local level. They open a space for technical intervention and political and critical discussion in a range of settings of how and why we construct particular measurement frameworks, and how we connect from the international to the national and local level.

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[3] For an annotated bibliography of works in this area see separate Appendix 1

[4] Throughout this concept paper the term schooling is used to refer to the formal processes of enrolment, attendance and instruction in schools, generally from early years to the end of senior secondary school. However, education takes place in many other sites, and when a wider or looser set of relationships is under discussion, or when a range of learning sites is signalled, the term 'education' is used. The only exception is when specific policy texts are referred to, for example, the education goals of the MDGs.

The aim of this concept paper is:

i) To propose a framework for discussion regarding how gender inequality and equality in schooling can be understood, and which elements of the framework can be measured with what possible consequences for policy and practice at different levels (international, national and local).

ii) To pose some questions regarding existing and projected datasets and approaches to measurement in relation to this framework and the implications of their use at different levels ((international, national and local) and why?

The paper is organised as follows: firstly, working definitions of gender inequality and gender equality in schooling and aspects of education are developed; secondly, some existing measures for gender inequality and equality are considered in relation to the definitional mapping; thirdly, a range of questions are posed for reviewing and critiquing the definitions offered and the ways measurement techniques have been selected to frame the workshop and take this discussion forward.

Defining gender inequality and gender equality in schooling
How we define gender inequality and gender equality in schooling entails more than a description of the numbers of girls and boys enrolled in and progressing through stages of instruction. Inequality is often portrayed as a line, above or below which groups or individuals stand in relation to resources (e.g. income or years at school). However, drawing on a broader definition of inequality derived from Sen's (1999) work on capabilities, we can understand inequality in general, and gender inequality in particular, as limits or constraints on the opportunities an individual or a group may have to choose and realise the actions, attributes and relationships of wellbeing they have reason to value. At the most abstract level, equality can be understood as expanding freedoms, opportunities, agency and valued outcomes without penalties associated with gender (Sen, 1999; Sen, 2011; Robeyns, 2007; Nussbaum, 2011).

However defining inequalities and equalities is not a matter of theory and abstraction. Concretely it requires us to understand the institutional foundations that reproduce inequalities and that can support equalities. These institutional foundations comprise both political and economic processes, socio-cultural norms, and policy and management regimes. Some of these institutional foundations directly underpin education systems, and some have an indirect connection. An analysis and assessment of gender inequality and equality in schooling needs to take in these institutional processes which work at international, national and local level, often in un-coordinated ways. Central themes in a definition of gender equality and schooling include understanding opportunities, experiences, processes, practices, and outcomes. Each aspect can entail the discrimination and subordination of individuals, which constrains opportunities, agency, and the realisation of valued outcomes. These restraints include forms of exclusion, silencing, stereotyping, marginalisation and violence on the basis of gender. Each aspect also entails understanding the intersection of gender with other kinds of inequalities (e.g. class, race, ethnicity, location, poverty, sexuality).

In assessing gender inequalities we need to pose questions about the scope and scale of inequalities. For example, in how many areas are inequalities experienced? Are inequalities in one field, for some groups or individuals, mitigated by equalities in another? Are some inequalities experienced more intensely and irrevocably for some groups and individuals and do these therefore require more concerted investments to develop institutions which support gender and other connected equalities? Are inequalities aggravated in particular contexts (e.g. war/conflict), which may require somewhat different approaches to measurement?

The concept of substantive gender equality put forward by UN Women (2015) in their latest *Progress of the World's Women* report offers a number of components that are useful to developing a definition of gender equality in education. They define substantive gender equality as 'redressing women's socioeconomic disadvantage, addressing stereotyping, stigma and violence; and strengthening women's agency, voice and participation' (p. 57). The definition could be expanded to include building and sustaining the institutions at international, national and local levels which support and sustain gender equality in and through education. Thus a working definition of 'gender sensitive policy, practices and learning environments' in schooling and the broader field of education (using the wording of the Incheon Declaration) for discussion is:

> *A dynamic connection of institutions (International, national and local) within and outside the education system that build, support and sustain processes which provide opportunities, practices and outcomes for gender equality in and through schools. Gender sensitive policy, practices and learning environments constructing gender equality entail a process which contributes to transforming unjust structures, including those which reproduce women's socio-economic and political disadvantage. These support policies and practices which address violence, subordination, stereotyping and stigma. They are linked with schools which help build women's agency, voice and participation both within and beyond education.*

We can mirror this with a working definition of gender insensitive policy, practices and learning environments in schools and the broader field of education as:

> *Those policies, practices and learning environments associated with the combination of institutions (international, national and local) within and outside the education system which reproduce or fail to challenge or change gender inequality in and through schools. These policies, practices and learning environments are particularly associated with the reproduction of unjust structures and with perpetuating women's socioeconomic and political disadvantage, with policies and practices which ignore or support violence, subordination, stereotyping, and stigma. They are linked with policies and practices which provide limited or no support in and through schools for women's agency, voice and participation.*

Working through these definitions in greater detail we can identify seven key areas of policy and practice in and through education where gender inequality and equality are important and where there is scope for measurement.

- Institutions outside education
- Institutions of the education system
- Teaching and learning practice
- Resource distribution to and within schools and education programmes
- Norms
- Demographics
- Outcomes of education

Table 1 provides further detail on these areas in relation to schooling:

Table 1: Policies and practices indicating gender inequality and equality in schooling

Area or field of inequality/equality	Reproducing gender inequality in schools	Supporting gender equality in schools

Institutions outside education	Laws, policies and practices which exclude women from political and economic resources and activities. Laws which reproduce and fail to redress historical inequalities. Laws which do not protect against child marriage, misogyny, violence against women etc.	Laws, policies and practices which include women in political and economic resources and activities. Laws which proactively compensate and seek to redress the impact of historical inequalities, e.g. laws which protect against child marriage, misogyny, violence against women, and which support sexual and reproductive health etc.
Education system institutions	Absence of women at different levels of decision making and leadership. Lack of engagement with gender issues in school management, administration and with school boards. Lack of engagement with gender & inclusion in teacher education & development Silence on reproductive rights & sex education. Silence on gender issues in national curriculum & nationally selected learning materials. Lack of codes of conduct or limited or no enactment of codes to deal with SRGBV; laws which exclude girls with early pregnancies from participating in school; etc. Absence of discussion of gender inequalities in guidance and counselling and in extra-curricular activities (e.g., sport).	Presence of women at different levels of decision making and leadership. Promotion of discussion of gender and equality in teacher education & development. Discussion of reproductive rights & sex/sexuality education. Discussion of gender and equality issues in curriculum & learning materials. Concern with gender equality in examination systems in use. Codes of conduct to deal with SRGBV ensuring knowledge and enactment.
Teaching and learning practice	Silence on gender issues in curriculum & learning materials at school level. Silence on gendered attitudes, interactions, relationships, construction of meaning in teaching and learning (teacher to student(s) and student(s) to student(s)) in the content areas. Silence on gender bias in connecting student learning and learning outcomes through exams.	Discussion of gender and equality issues in curriculum & learning materials. Discussion of gender dynamics in teaching and learning between teachers and students, students and students (i.e., small group learning) in all subjects. Strategies for correcting gender bias in teaching and learning with learning outcomes.
Resource distribution	*Absence of resources to realise gender sensitive education:* Unequal distribution of finance e.g. gender & teachers' and managers' pay, or large investments in areas of education where women are a minority; lack of schools, segregated latrines, teachers, learning materials, water, food, secure long term finance, which take account of needs, additional gender inflected needs of particular girls or boys	*Provision of resources to realise gender sensitive education:* Gender budgeting and scrutiny of finances in terms of what is spent on women and men; includes gender equality in teacher pay and conditions, schools, adequately trained teachers, learning materials, water, transport, food, secure long term finance. Concern to consider additional resources for groups of girls or boys with additional gender inflected needs
Norms	Absence of girls' and women's voices in reflecting on aspects of SRGBV, reproductive rights, existing inequalities and connecting exclusions associated with e.g. stigma and	Presence of girls' and women's voices in reflecting on aspects of SRGBV, reproductive rights, women's participation in transforming inequalities including identifying stigma and

	stereotyping. High levels of violence (sexual violence/harassment, corporal punishment, bullying); attitudes that support stereotypes and misogyny. Absence of attitudes, actions and symbols that challenge stereotypes, discriminatory practices and behaviours. Absence of work with boys and men on understanding and seeking to change gender and other inequalities	stereotyping. Strategies to address high levels of violence (sexual violence/harassment, corporal punishment, bullying), and address attitudes that support stereotypes and misogyny. Fostering attitudes, actions and symbols that challenge stereotypes, discriminatory practices and behaviours. Work with boys and men understanding and seeking to change gender and other inequalities
Demographics	Gender disparities in enrolment, attendance, progression, attainment and learning outcomes, including knowledge about gender and other inequalities. Look at gender intersecting with class, race, ethnicity and location	Absence or reducing gender disparities in enrolment, attendance, progression, attainment and learning outcomes; knowledge about gender and other inequalities. Consider in relation to intersections with class, race, ethnicity and location
Outcomes	Connections between levels or relationships of schooling for groups defined by gender and other intersecting inequalities and exclusions or inequalities in relation to labour market access, conditions of employment, access to resources, political participation, and participation in social or cultural action, and lack of improvements in health	Connections or relationships between levels or relationships of schooling for groups defined by gender and other historical inequalities and the building of equalities in relation to labour market access, conditions of employment, access to resources, political participation, and participation in social or cultural action and improvements in health.

This framework suggests that both gender inequality and gender equality in schooling are not static and that any approach to measuring these processes must attempt to capture both the dynamic of moving and connecting relationships. An approach to measurement would also need to indicate where resources are needed for which component of this framework and map what outcomes may be associated with what kinds of interventions. Change over time both in relation to interventions, the shape of institutions, and a range of outcomes will need to be documented. The framework in its current form includes fields that can be assessed nationally, and some that need to be assessed locally.

Measuring gender inequalities and equalities in schooling: A preliminary review of resources and some questions
In looking at the question of measuring gender inequalities and equalities in schooling, we need to clarify what we are measuring and why we are measuring. Some approaches to measurement stress the importance of measuring aspects of resources (teachers, school places), how much is distributed to whom, and the results associated with these allocations (attendance, progression, attainment). Other approaches draw on normative assessment, for example, reporting what participants in surveys say gender equality or women's empowerment looks like. Some approaches develop frameworks regarding what a list of important equalities comprises. Thus a range of different datasets may be useful for measuring aspects of gender inequality and equality in schooling. These combine what Clark (2014) has called approaches to measurement that stress resources, preferences, and lists of equalities and wellbeing.

In Table 2 some datasets or approaches to measurement at the international or national level are suggested for the areas outlined in Table 1.

Table 2 Datasets or approaches to measurement which can assist reporting on gender equality and inequality in schooling

	Reproducing gender inequality in schools		Supporting gender equality in schools	
	Policies & practices	Measures & data	Policies & practices	Measures & data
Institutions outside education	Laws, policies and practices which exclude women from political & economic resources and activities. Laws which do not protect against child marriage, misogyny, violence against women etc.	SIGI index; African Women's Progress Scoreboard; gender gap index; global scorecards or legislation on child marriage etc.	Laws, policies and practices which include women in political and economic resources and activities. Laws which protect against child marriage, misogyny, violence against women etc.	SIGI index; African Women's Progress Scoreboard; CEDAW and HR monitoring frames and information on women's empowerment (e.g. GEM, GII)
Education system institutions	Absence of women at different levels of decision making and leadership. Lack of engagement with gender in teacher education & development. Silence on reproductive rights & sex education. Silence on gender in curriculum & learning materials. Lack of codes of conduct to deal with SRGBV.	Institutional audits within schools. Some data captured by EMIS or Teachers' service commission or studies of TTIs. Some captured by NGOs. Unevenly documented at country level. GPE Gender stocktaking of GPE partner countries; UNICEF West Africa – institutional and political barriers to girls' education in 8 countries (2014 and 2015). PISA data on teacher training	Presence of women at different levels of decision making and leadership. Gender & inclusion in teacher education. Discussion on reproductive rights & sex education. Discussion of gender in curriculum & learning materials. Codes of conduct to deal with SRGBV and ensuring knowledge and enactment of them	Some data exists on gender budgeting, but not clear how much this has been used in schools; most other data for this field not currently documented. Some national surveys? Data on addressing gender bias in national curricula (IAEA). PISA data on teacher training
Teaching and learning practice	Silence on gender issues in curriculum & learning materials at school level. Silence on gendered attitudes, interactions, relationships, construction of meaning in teaching and learning (teacher to student(s) and student(s) to student(s)) in the content areas. Silence on gender bias in connecting student learning and learning outcomes through exams.	Classroom observation data. Data on teacher & students gendered attitudes and interactions. Unevenly documented at country level.	Discussion of gender and equality issues in curriculum & learning materials. Discussion of gender dynamics in teaching and learning between teachers and students, students and students (i.e., small group learning) in all subjects. Strategies for correcting gender bias in teaching and learning with learning outcomes.	Classroom observation data. Data on teacher & students gendered attitudes and interactions. Unevenly documented at country level. Some data from PISA and SACMEQ

Resource distribution	*Absence of resources:* Unequal distribution of finance e.g. teacher pay, schools, teachers, learning materials, water, food, secure long term finance.	Resources available for schooling for different groups of children (EFA GMR but granular enough to capture different needs?). Use data on child health from DHS and observatory material*? Young Lives* data.	*Provision of resources:* Gender budgeting & scrutiny of finances; in gender equality in teacher pay and conditions, schools, adequately trained teachers, learning materials, water, transport, food, secure long term finance.	Resources available for schooling for different groups of children (EFA GMR granular enough?) Data on child health from DHS and other observatory material could be developed? *Young lives.*
Norms	Absence of girls' and women's voices in reflecting on aspects of SRGBV, reproductive rights, existing inequalities and connecting exclusions including stigma and stereotyping. Absence of work with boys and men on understanding and seeking to change gender and other inequalities.	Data from DHS on attitudes to GBV; Program H Gender-equitable Men Scale; possibly also data on women's employment and time use as measured in the Gender Status Index.	Presence of girls' and women's voices in reflecting on aspects of SRGBV, reproductive rights, women's participation in transforming inequalities including identifying stigma and stereotyping. Work with boys and men understanding and seeking to change gender and other inequalities.	Attitudes from DHS data and Eurostat; Program H Gender-equitable Men Scale; UNICEF surveys of children's confidence and views of schooling; bullying etc.; PISA data e.g. ABC & other material on autonomy from PISA; anything in TIMSS or SACMEQ?
Demographics	Gender disparities in enrolment, attendance, progression, attainment and learning outcomes, including knowledge about gender and other inequalities. Look at gender intersecting with class, race, ethnicity and location.	UNESCO WIDE database; anything from learning metrics task team?	Absence or reducing gender disparities in enrolment, attendance, progression, attainment and learning outcomes; knowledge about gender and other inequalities. Consider in relation to intersections with class, race, ethnicity and location.	WIDE; possibly considering in more granular way whether there are differences in which streams (academic, vocational, administrative) girls and boys are located, and which areas they proceed to work in after compulsory schooling (some version of data from Gender Status Index).
Outcomes	Connections between levels or relationships of schooling for groups defined by gender and other intersecting	Longitudinal studies (e.g. Young Lives); DHS data; Women's Empowerment and Agriculture Index.	Connections or relationships between levels or relationships of schooling for groups defined by gender and other	Longitudinal studies (e.g. Young Lives); DHS data; Women's Empowerment and Agriculture Index.

inequalities and exclusions or inequalities in relation to labour market access, conditions of employment, access to resources, political participation, and participation in social or cultural action, and lack of improvements in health.		historical inequalities and the building of equalities in relation to labour market access, conditions of employment, access to resources, political participation, participation in social or cultural action, and improvements in health.	

In highlighting some preliminary sources of data for each of these 7 areas, this analysis has not been able to consider what the relationship between different areas of gender inequality and equality in and through education is or should be and how the dynamic interchange between them could be measured. Some aspects of this are considered below, where we set out a number of key questions for the workshop, which seek to unpack some features of how to measure and assess the relationship between the different areas or facets of gender equality and inequality in and through schooling and the wider field of education.

Some critical questions:
i)   In documenting these 7 areas of gender inequality and equality, do we wish to build up a composite picture, so that over given periods (say every 5 years) we will be able to show this is what our multi-faceted view of gender inequality and gender equality in schooling looks like for each country, possibly each region and each bloc of countries (e.g. high, middle and low income or Southern Africa, Eastern Africa etc.)? We need further discussion on how they inter-relate, conceptually and empirically.
ii)   Will a composite index mash all the information together so that we are not able to see the nuance of the constituent parts? Or could we construct an index that is both composite and where we could look separately at each of the 7 constituent parts? Or could some of them be grouped (e.g. are teaching and learning practices at school/classroom level part of the same domain/field as education institutions or are they different and is it difficult to form a national measure?
iii)   Is it feasible or desirable to create a composite index to include the 7 fields for all countries, and what can we learn from experiences of multidimensional measurement of poverty or other kinds of inequalities?
iv)   Would countries, communities, blocs have to show progress in developing equalities and addressing inequalities in all the 7 areas? Or would we (variously defined) consider it acceptable if there is gender equality in some areas, but not all? For example, if there was gender equality in basic education (as measured through demographics), but gender inequality in two other areas – say education leadership and in laws relating to women owning property and participating in national government – would we say one kind of equality could be traded off against another? This question raises the issue of who the audience/user group of this measure is. Women's participation in politics is linked to the work of UNGEI, UNESCO and the education sector, but is not their core business. To make measurement of processes in education realisable UNGEI recommends focusing on the education sector, but perhaps other agencies might measure more broadly. Would we require gender equality in all 7 areas or three or four

out of seven, and how would we decide which? Would we confine our attention to the education areas or is this too narrow? Who would set these benchmarks and what would be the process of discussion and accountability?

v) Do we need a separate measure of equality and inequality at international, national and sub-national level? Or do we think equality looks the same everywhere, but there are different combinations of inequalities? Or is equality also contextual and inequality looks the same everywhere? How can we take account of local conditions and relationships of participation and accountability in developing our approach to measurement? Is it feasible/desirable to develop an equalities measure in education at national level using the processes CASE developed in UK developing lists of valued equalities and critically reviewing these with vulnerable and excluded groups (Burchardt and Vizard, 2007)?

vi) Who is best placed to gather the data mapped in these different areas and to whom are the data gatherers accountable? In many countries school collect EMIS data, often gender disaggregated, but this is not analysed or used to consider implications regarding gender inequalities or equalities. Current education sector planning needs much more attention to gender responsive processes, using data collected for planning, programme design, implementation and monitoring. What are some of the current obstacles to using data in this way?

vii) Some data is routinely gathered already through a well-established relationship between international and national teams (national ministries of education and departments of statistics, UIS, DHS). Some is gathered through national census offices or other reviews (e.g. CEDAW review process). But there is considerable variation between countries in their capacity to collect census data, and sometimes findings are disputed. Not all countries accede to review processes e.g. CEDAW and CRC. How do we develop a good enough and accountable process of data gathering and review?

viii) The framework contains data collected and assessed nationally, and some that requires local classroom observation. What sampling process would guide the selection of classrooms for observation, and how could methods for this be robust?

ix) Is it useful to develop some shorthand gender inequality measures considering the depth of lack of education for particular populations, e.g. the numbers of women by say ethnicity or class who lack literacy and numeracy, fail to complete a basic education cycle, and have no access to post school education and training. Could we say that women who fall below a cut off line in all 3 areas experience a more severe form of education inequality, than if they fall below the line in just one area? WIDE has begun to offer this, e.g., severe education disadvantage: numbers of girls and boys from different groups who have less than 2 years of schooling (education disadvantage below 4 years). Can this be extended to identify individuals or groups with additional education disadvantages?

x) Is it feasible/desirable to construct a measure for education like the OHPI women's empowerment in agriculture index with two components of empowerment: i.e. aspects of women's empowerment proxies taking say from DHS or SIGI databases and then a gender parity component built from education databases?

xi) Different countries have different histories of discrimination and subordination for particular groups and these persist even though official laws do not sanction this. How will we address/monitor a country having a law or policy in place but not acting to implement this? Can we use/adapt some existing measures and approaches to training (e.g. USAID measure on SRGBV currently under discussion.

xii) It is a moot point whether girls' and women's rights are always expanded and protected as an outcome of education. We know that gender parity or equality in schooling does not always translate into gender equality as an outcome of schooling, but the literature on this relationship is limited (Unterhalter et al, 2014). There are many permutations of

this relationship and much research remains to be done. For example, in some regions, women lack opportunities to access the labour market, even though girls may have education. In others, women can access to the labour market, but encounter discrimination in the kinds of work available, conditions and pay. This has little connection with their education levels. In some societies women have good education and work opportunities, but there is deep misogyny, evinced in violence against women, and ingrained resistance to change, e.g. cultures of management or the structures of pay. It is important to understand a range of pathways through education to different kinds of outcomes with regard to gender equality and women's rights. The existing composite measures, e.g. GEM, GDI, and Gender Gap index, push this information together, and while they give some useful information ranking countries, further research is needed on what these pathways are. In countries where longitudinal data has been collected (e.g. Young Lives (Peru, Vietnam, Ethiopia, India), UK, Sweden, or where there is good panel data (e.g. South Arica) some of these trends can be mapped. Some key questions at the country and local level in building an extended research programme in this area are:

- Is there a relationship between levels of women's and girls' participation in different forms and levels of schooling, areas of employment, and mean pay for women in particular occupations?
- Is there a relationship between whether women have completed primary, junior secondary, senior secondary or tertiary education and their political participation at all levels (local i.e. school, ward, district, national)?
- Is there a relationship between the numbers of women reaching particular levels of schooling and women's capacity to mobilise to address unjust structures and norms?

These and other questions for further research can help explore causal pathways, possibly with a view to feeding back some of this information into the approaches to measuring gender inequality and equality in schooling outlined above.

Conclusion
This paper has attempted to outline for discussion and critical review some working definitions of gender inequality and equality in education, and particularly in schooling. The intention is to open a discussion that can contribute to steering policy and practice away from the narrowness of gender parity as a proxy for gender equality. One of the intentions of the broader definitions offered here is to look both at gender in the distribution of opportunities and outcomes in schooling, and to review the institutions which might perpetuate aspects of gender inequality, despite gender parity in distribution. The discussion aims to try to build the connections for equality between education and other economic, political and social sectors, and to open up for scrutiny the question of who generates, discusses and uses the data, and how local processes, which inform policy and hold decision makers to account, can be built.

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