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| Aalborg university |
| **Why measure access and quality of education through the use of the Capability approach?** |
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| Thesis for the M. Sc. programme on Development and International Relations (DIR) and European Studies (ES) |
| *-An exploration in the context of Nepal* |
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*Submitted by*

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**9/30/2013**

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**Pages: 55**

**Words: 19.516**

**Keystrokes: 123.755**

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***Abstract***

Education is a key enabler to quality of life outcomes. One of the main questions for policy makers today is how to structure education and measure its results on people, to see whether it is achieving its goal. With less than three years before the Millennium Development Goal Deadline in 2015, many countries are yet to reinvent education in ways that it will enable their citizens to establish the lives they deserve to enable them to contribute to a fair society. The recognition of education as a basic human right and the corresponding global push has seen millions of children that were previously deprived of education having been brought in school. Yet, at the same time research as well as the daily reality shows that the current education systems do not meet the requirement for preparing people to live, work and participate in today's societies, let alone those of tomorrow. With global economic recessions and booming population, education needs to be ready to step up to the challenge and enable people to be ready for being an active part of the future's society. Within this context, this thesis explores the potential of the capability approach as an evaluative framework to assess two core components of the education system; equity and quality, with the aim of guiding the reinvention of quality as a means for people to fulfil their capabilities and establish overall well being. The capabilities approach is described in detail, and then it is applied to the context of education in Nepal. The former Himalayan Hindu kingdom is currently going through a number of transitions in terms of moving from a society ruled through the principle of humans being of different value and purpose in life that was conceptualized through the caste system to a federal democratic republic that needs to find a way to provide adequate space in its structure for its more than 100 different ethnicities and languages, its ways of embracing innovation without losing cultural heritage and its ongoing experiment of using democracy as a way to leave the scars of the ten year civil war behind them. Nepal is therefore been selected as a country case study with regard to the question of whether the use of the capability approach as a theoretical framework in education can turn its diversity into an opportunity rather tan it becoming a threat to the nation. This thesis concludes that the capabilities approach is suitable for measurement of quality and equity within education. It is able to provide context specific indicators while protecting the most marginalized, and also provides a framework within which context specific indicators can be compared nationally and internationally.

***Acknowledgements***

**I would like to not take up more space then I already have but need to quickly issue a warm thanks for the following people that made me get my act together and finish this: Jytte Kongstad (rock in stormy weathers), Joanna Morrison (Love of my life), Ger Oostrum (best dad anybody could ask for) and Anne Larsen (being there in the last stretch to dock the ship)**

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**"Education is what remains after one has forgotten everything he learned in school"**

**-Albert Einstein**

1. **Introduction**

Education is internationally and timelessly recognised as the main tool to provide people a foundation for developing skills and abilities to function in life, to live among and with other people, give structure to society and strengthen their livelihoods. What is defined as education varies in different cultures and eras, as well as historical and contemporary educational theories and ideologies. Yet there is agreement that in principle, education is an undeniable part of people's development and their access to education affects the quality of personal life, social structures, society as a whole and their relation with the environment.

The purpose of education is, had never been universally agreed upon. It purpose has been described as for the development of morals to guide social and societal relationships by Confucius. Socrates described it as developing critical thinking in pursuit of finding the true nature of things. El-Ghazalli proposed that education fostered empathy in students. Rousseau thought the purpose of education was to learn through active engagement with the surroundings and through using all senses. Kant proposed that it enabled the shaping of moral characters. For Darwin, education was theorizing life through extensive observation, and for Nietsche it was a way to unleash the inner 'ubermensch'. Durkheim felt that education was to create compatible social beings for society. Sen believes that education can provide freedoms and unleash capabilities and Nussbaum’s approach sees education as establishing cultural and social awareness and empathy in people, (Palmer, 2001). This thesis explores the perspectives of Sen and Nussbaum in considering education through the capabilities approach.

In less than two years, the Millennium Development Goals targets for education and the Education For All goals will be reviewed. Education experts, agencies, national coordinators and governments will review where the world stands in terms of achieving the provision of quality education for all. Simultaneously, there is a continuing global debate about what quality education should look like beyond 2015. The increasing realization that the scope of learning needs to be broadened with regard to content, methodology, duration and location is at the same time as international resource constraints, capacity limitations and cultural and political barriers impede redesigning education accordingly(UNESCO, 2012).

The systems and mechanisms used to measure educational outcomes show that the aligned movement towards access to education has brought millions of children that were out of school into the classrooms over the last two decades and that many of these children are girls. However, the latest figures estimate that worldwide currently around 61 million children remain out of school (UNESCO, 2012). Furthermore, this increase in enrollment should not be seen as an achievement in itself if children are not learning. In Asia alone, millions of children that are enrolled in schools have been identified as not learning (Save the Children, 2013). There are gaps between the skills that people have mastered when leaving education and the skills needed by the private and public sector. Experts claim that current education systems cause harm rather than learning as an outcome (Robinson, 2006).In aligning the world to jointly try to achieve education for all, quality and relevance of education to the learner may have been forgotten, but are important in ensuring that people can education it to establish a good quality of life(UNESCO, 2005).

As a result of this observation, international educational development scholars are trying to ensure that quality of education is given equal priority as access to education. There is an increasing international focus on learning outcomes and how they compare within and across countries. The Program for International Student Achievements (PISA) is an example of a globally recognized mechanism to compare learning outcomes by assessing 15-year-olds' competencies in key subjects (reading, mathematics and science) in over 70 countries.

The global push to achieve education for all as a right and necessity is coupled with a push to ensure that education should be learner centred, ensuring access, equity, quality and relevance. There is a need to measure the outcomes of education in order to ensure that all countries are indeed making progress in providing all learners what they are entitled. The education system needs to create citizens that actively take part in society and can adapt to future challenges that growth in population and scarcity of resources may bring, and be able to deal with the implications these two things have on the eco systems. Yet it is difficult to assess the current state of education to ensure that people benefit in the optimal way from their exposure to education. On the one hand it is beneficial if data were comparable and achievements could be tracked across cultures and countries to construct national, regional and global pictures of the state of education and its learners. Yet at the same time the complexity of need, learning processes and the diversity of barriers that are preventing this may make context specific measurement more feasible.

The country that we will use to demonstrate the use of the capabilities approach in education is Nepal. Nepal is facing challenges in developing a quality education system with access for all children. This is challenging particularly because Nepal is going through a period of social and economic development transition. It has been less than a decade since the country progressed from armed conflict between the Maoist insurgency and the King's government, and became a federal republic. Although exclusive institutions such as the caste system have been abolished and all people are equal in the eyes of the law, the daily reality for many people in Nepal is still characterised by systematic discrimination on the basis of caste. Lower castes face barriers to equitable participation in public life, political representation and wealth distribution (Battachan, 2001). Nepal is looking at ways of developing an inclusive and holistic approach towards education (Ministry of Education Nepal, 2009)but this is challenging as there are over 100 languages and ethnicities across a high variety of ecological regions and it is a very diverse country. Yet, there is still a need to find adequate ways of measuring the outcomes of education(Cummings, 2012).

This thesis acknowledges the important and challenging task that faces many countries, particularly low income countries like Nepal, in measuring quality and equity in education. It explores the utility of the capabilities approach in helping government and practitioners view learners and their needs in developing their capabilities as the starting point. It considers the principles of Amartya Sen's capability approach, the measurements of social justice by Martha Nussbaum and multi dimensional poverty by Sabine Alkire. The capability approach puts people at the core of its focus and concentrates on the fulfilment of their capabilities in order for them to achieve a just quality of life. In doing so, it does not focus on inputs or equal access to resources but what people are able to become or do with these opportunities and resources. Education is seen in the approach as one of the key means for people to reach their full potential capability(Nussbaum M. , Education and Democratic Citizenship: Capabilities and Quality Education, 2013).

This thesis considers the capability approach to measure two main indicators of the state of education: Equity in education and quality in education. As Nepal’s context is particularly diverse, it provides an interesting context in which to consider **measuring access and quality of education in Nepal through the use of the Capability approach.** Specifically, this thesis will explore:

1. What are the main concepts, applications and critiques of the Capability Approach?
2. What are the concepts and dimensions with Equity and Quality of education?
3. What is the current context and state of education in Nepal?
4. How are educational outcomes measured in Nepal?
5. What are the advantages to measuring equity and quality of education in Nepal using the capabilities approach?

## Methodology

This thesis will use the literature to paper describe the Capability approach as articulated by Sen and the developments of this approach by scholars such as Nussbaum and Alkire to through application of the approach. The main critiques developed in response to the approach will be presented, and a description of the current application of the approach to education will be provided. Chapters three and four will examine the concepts of equity and Quality within education and the different dimensions that these concepts carry in education. Chapter five will provide an overview of the context of Nepal and the role of education in society. The status of education in Nepal will be presented and the trends identified that will determine priorities and issues within the sector in the coming years. Chapter six will analyse the context and the status of Education in Nepal through the Capability approach theoretical framework. Chapter seven will provide conclusions, recommendations and discussions with regard to the stated research question.

## Limitations

This thesis started initially from the aspiration to end up with a conceptual model of measuring Equity and Quality in the education system in Nepal through participatory qualitative data collection, time and resource constraints have been the main causes for it to remain fully relying on secondary data collection within Nepal and thus should be seen as a starting point for further research in exploring the option whether the use of the capability theoretical framework is viable and desired in the context of Nepal.

1. **The Capability approach**

This paper discusses using the capability approach in the evaluation of education; therefore an overview of the approach is presented in this chapter. This paper presents the theoretical concepts on which the capability approach is based, then describes the main concept within the approach, and its conceptualization by main contributors Amartya Sen and Martha Nussbaum will be presented. Ongoing debates, and observed strengths and limitations are also discussed. The chapter ends with a description of a practical application of the approach through the work of the Oxford Poverty and Health Initiative (OPHI), which enables demonstration of the possibilities for implementing the approach to evaluate education.

## *Origins*

Aristotle (384-322 BC) observed that only through the correct upbringing and education, people would be able to combine knowledge and morals in making 'just' choices. This would enable fulfilment of their purpose and flourishing of society. What this purpose is, and how it can be fulfilled has been the subject of exploration by educators, lawmakers, philosophers, and economists. The Social Choice theory emerged as a theoretical discourse within welfare economics in the 19th century as a response to this question. It also attempts to broaden the scope of determining peoples' needs and wants beyond the economic dimension, through also including consideration of how people benefit from decision making processes on moral concepts and utilities (Sen A. &., 1993)&(Rowley C. K., 1993). It was assumed that this would enable welfare economics to eventually measure overall well being and happiness of people through quantitative methods (Feldman, 1980). However, it was observed that outcomes of satisfaction and achievements would always differ, even if the context and available resources where identical.

The vision of Social Choice theory is that through collective decision making, a situation will be established where all individuals involved in the decision making process will benefit in optimal ways within what is possible, (the *Pareto Optima*l). If and when the outcome could be adjusted in a way that this would further benefit any or all of the individuals involved, without this having any negative effects on the established outcomes of any or all of the individuals, the Pareto Optimal has not been achieved (Kelly, 1988). For a long time, this concept of the ideal scenario was only looked at through an economic perspective but with the establishment of Social Choice theory, a broader concept of well being was introduced to analyze and evaluate choices and decisions that affect collectives(Sen A. , 1999). When looking at collective decision making processes, the relationship between collective decision making and the Pareto Optimal is observed to be flawed. Sen (in Agarwal 2006) introduces the notion that genuine decision making can lead to outcomes that are not the Pareto Optimal, which he refers to as the *liberal paradox.* This notion of choices and freedoms to make these choices not leading to best possible outcomes is something he further develops through the notion of *adaptive reflections*, which will be explained when examining the capabilities approach in this chapter. Also in this regard, the *Impossibility theorem* developed by (Arrow K. , 1997) is of note, where a genuine choice on preference of more than two options provides opportunity for outcomes that can identify different options as the most desirable to collective preferences, depending on what preference criteria is applied. An example of this that of the 2000 US presidential elections; political commentators believed that in the race between Al Gore and George W. Bush, the popularity of Ralph Nader's Green Party was likely to make Gore loose and thereby Bush win, even though it is likely that everyone who voted for Nader would prefer Gore, and not for Bush, if those were the only two options.

It became apparent that providing people with the freedom of choice in pursuit of their well being and happiness does not by default lead to the accomplishment of that within the possible options. Also, collective choices might not be adequate to respond to the peoples’ diverse needs to achieve desired outcomes with regard to their 'being' and 'doing'. Sen(Agarwal, 2006) therefore noted that there is an additional dimension in the social choice theory besides the decision making which is focused on welfare of individuals within the collective. This also links to the concept of justice, as developed by Rawls(Rawls, 1971), which has led to the development of the Social contract concept. This concept emphasises the responsibility of society to ensure equitable distribution of resources, taking the diverse need of the individual into account. The social contract idea has provided a theoretical foundation for Martha Nussbaum's concept of justice within the capability theory.

## *Capability approach*

The Capability approach was introduced by Sen in the 80s and further developed through his work over the next three decades. Firmly rooted in the social choice tradition and the liberal school of philosophy, the approach looks at the choice or freedom that people have in realizing a 'good life' and the barriers that obstruct people from doing this (Sen A. &., 1995). It acknowledges the efforts of welfare economics and utilitarian approaches towards capturing 'quality of life’, but moves beyond this, offering a more in depth way of measuring the situation of people as they are, or what they can become capable of. Therefore it is a framework for evaluating well being and things that create, drive, threaten, block and influence social change, (Nussbaum M. &., 2007)&(Alkire S. , The capability approach to the quality of life, 2008). The capability approach can be used to assess human development (Vaughan, 2012)and is also recognized for its usefulness in analyzing interpersonal inequalities, for example within communities and households (Robeyns I. , 2006).

Sen’s work has provided a framework for a number of theories and evaluative approaches to be developed, with Martha Nussbaum acclaimed as one of the main contributors in further developing theories within the approach. She has a strong focus on justice and links the approach to feminism (Robeyns I. , 2006). More recently, Sabine Alkire has used the approach as a theoretical framework in the measurement of multi dimensional poverty(Alkire S. , 2010). The approach has gained recognition amongst development practitioners, through the influence it had on the design of the Human Development Index (HDI) and the evaluative framework adopted by the United Nations in their Human Development Reports. Critics, such as Pogge(Pogge, 2010), state that although the HDI has gone beyond a solely resource based assessment, its focus should still be seen as a resourcist approach (therefore with an emphasis on input of resources) and not in line with the spirit of the approach developed by Sen. It should also be recognized that although the capability approach focuses on people and the opportunities they have to achieve their full potential, it does not seek to provide insights or explanations for the causes of inequalities. It rather provides a framework to measure human equality(Robeyns I. , 2003).

The capability approach can be seen as a theoretical framework that provides space to develop evaluations of social change, and a tool that empowers people to identify their potential and the things that are blocking them from reaching their full potential to be active and accountable participants in society. It can also be a measurement to evaluate the well being of a collective - taking personal, social and environmental arrangements into account (Sen A. &., 1995). It enables an assessment of what people are able to be and do within their situation, considering the resources or means that they have access to. It clearly distinguishes between means and ends in reaching ones’ potential within their capabilities. The capabilities approach thereby clearly distances itself from welfare economy theories and approaches, by only considering ‘means’ as important in their contribution to the ‘ends’ and thus not carrying intrinsic value (Robeyns I. , 2003).

## *Main concepts*

The approach focuses on people's opportunity to achieve within their capabilities rather than on the distribution of inputs in terms of resources (Vaughan, 2012).Sen(Sen A. , 1999) describes capabilities as what people are able to do or be, therefore they are peoples' natural right. When people realize their capabilities, they do so through *functionings* - things that 'people value or have reason to value[[1]](#footnote-2)' (Arrow K. J., 1997). All of this should be seen in the context of people establishing a state of *well being*, with the means of well being instrumental to reach the ends of well being. Well being or achieved functioning is described by Robeyns (Robeyns I. , 2003)as people's 'capability to function on their effective opportunities, to undertake the actions and activities that they want to engage in and be who they want to be.[[2]](#footnote-3)'

The actual choice of someone to pursue functionings is defined as *agency* by Sen. The extent to which these functionings have been or will be transformed into achieved functionings is related to the presence of resources and depends on people's *conversion factors*. Sen(Sen A. , 2003) initially identified four dimensions of these factors: (i) *Individual psychology*, the individual features of people that influence the extent to which they can utilize resources, (ii) *Local environment diversities*, the physical context in which people utilise these resources, (iii) *variations in social conditions*, referring to the social structures that can support or obstruct people during the utilization of resources, (iv) *differences in relational perspectives* - the way people are being perceived in their surroundings (v) *distribution within the family[[3]](#footnote-4).* These conversion dimensions do not only determine the way resources are used but also the extent to which resources are available for people in the first place. In his later work, Sen(Sen A. , 1999) has simplified these factors into three main dimensions: (i) personal, (ii) social (combining 3 and 5 from the previous dimensions) and (iii) environmental (combining 2 and 4 from the previous dimensions). After having established one's capability set through these conversion factors, the choice to achieve these functionings can then be seen as a second level of conversion factors to turn this capability set into achieved functionings.

Conversion factors significantly affect the ability of the approach to identify diversity in needs and outcomes on different levels. For example, even though a brother and a sister both live in a country where public schooling is free or perhaps even compulsory by law (resources or input), the capability of these two children might be very different as the boy might have a physical impairment that affects his access to education (individual psychology or personal dimension), the girl might not want to go to school as she feels people in her surrounding are dismissive of the fact that she 'wastes' her time being in class rather than performing duties around the house like other girls do (differences in relational perspectives or social dimension). Or perhaps she does not go to school because she doesn’t feel safe on the walk to school, nor in school as she suffers from harassment from her peers (local environment diversities or environmental dimension). Furthermore, she could experience none of these barriers but achieve lower learning outcomes in comparison to her brother because she is malnourished, due to unequal food distribution, or she may not have access to the torchlight in her family to do her homework (distribution variations within the household).

Personal well being has been identified as a person's standard of living, which can be accomplished through the conversion of means and opportunities. People have a diversity of conversion opportunities on a personal, social and environmental level, and they realize their personal well being at different levels and in different ways. Thus when looking at the extent to which people will have capabilities, one needs to consider their means to achieve, the existence of available resources, their characteristics, and the presence and influence of different conversion factors. Some of these factors can also be separate capabilities, such as health and safety. An important feature of the approach is that the focus should remain on the opportunities that someone has to realize their capability, rather than on the provided or accessible means (Robeyns I. , 2006).

By including the consideration of sympathies and emotions, people's constraints in achieving their potential functionings or capabilities can be identified, as well as people's *overall well being. F*or example taking into account whether someone would *want* to go to school to become literate, whether they would get personal satisfaction from their studies, whether they would have role models that could motivate or not motivate them to succeed in learning to read and write. To establish the *overall agency* in achieving functionings within capabilities, a person's commitments should be taken into account. For example, a girl feeling obliged to abstain from studying at home, even though she has been provided the means and freedom, because she feels an obligation or desire to help her mother with the work in and around the house. In this way the approach also takes into account the subjective elements that influence people to achieve their opportunities as well as their moral constraints and those of society (Robeyns I. , 2003). The relation between these various states of being and doing and the conversion between these states can be seen in the diagram show below.



Figure 1: Sen in Robeyns 2003, p. 12

While the basis of Sen's approach on capabilities is built around the concept of freedoms, Nussbaum focuses on dignity and her theory has been developed around the concept of justice (Robeyns I. , 2006). Sen's approach seeks to find ways to measure people's quality of life, and use measurement to identify and remove deprivations. Whereas Nussbaum's theory aims to establish an ideal scenario in which everyone is entitled with minimal access to the choice of fulfilling their capabilities.

## Defining capabilities

Sen identifies both *basic capabilities* and *general capabilities*. Basic capabilities are a subset of all capabilities as they are directly related with people's basic needs and thereby essential to be accomplished for sustainable survival. General capabilities are more generic in nature and serve as the basis to develop other capabilities (Robeyns I. , 2006).

Sen has been urged to provide or acknowledge a list of functionings or freedoms, in order to provide more pragmatic opportunities for the utilization of the approach. He has consistently refrained from doing so, although he does specify political freedom, economic facilities, social opportunities, transparency guarantees and protective security as different categories of capabilities[[4]](#footnote-5) but remains certain that designing a list is not possible, as it would 'fail to take into account the reality and context of the population concerned[[5]](#footnote-6)' (Robeyns I. , 2003). In contrast Nussbaum has developed a list of *fundamental capabilities[[6]](#footnote-7)*, which can be endorsed by society rather than be considered as absolute (Nussbaum M. , 2011).

1. Life without being prematurely ended,
2. Bodily health, including reproductive health and adequate shelter,
3. Bodily integrity, comprised of the freedom of movement and from any type of violence, as well as sexual satisfaction and agency in reproduction,
4. Senses, Imagination and Thought, cultivated by quality education, but as Nussbaum states 'by no way limited' by education core subjects, creativity and freedom of mind, opinion and speech and the freedom to enjoy and avoid discomfort,
5. Emotions, both one's own state of being and towards others, both positive (love, joy, valuing) and negative (in justified manner and ways), and having the freedom from experiencing permanent or long term negative emotions (trauma, anxiety, depression),
6. Practical reason, having ethical considerations and control over one's choices based on this,
7. Affiliation, having emphatic sense and social standards to function with and around other people,
8. Other species, being a conscious part of the flora and fauna context one lives in,
9. Play, being able to enjoy and engage in recreational activities,
10. Control over one's environment, both in being able to exercise one's political rights and to be an equal part of society, and in to have, own earn and gain property in an equal matter to others and through being included in the labour market.

Nussbaum states that these capabilities need to be guaranteed by governing bodies to a minimum level (a sufficientarian threshold) unless people make the choice not to achieve these capabilities. The extent to which people will be helped by the state in having access to these capabilities should be democratically decided and enforced by a national and international legislative framework. However, national interpretations of the practical implications of enforcing these capabilities can differ, thereby recognizing cultural diversity. Although Nussbaum recognizes the limitations of defining a list of capabilities, she also recognizes the disadvantages of leaving people to define their own capabilities, as they might not always have the capacity to identify the full range of capabilities. For example someone who has not lived free from oppression might not be able to define the concept of freedom of choice and someone that has a mental disability might not be able to define what she or he is in need of (Nussbaum M. , 2011).

Scholars, such as Gasper and van Staveren (Gasper, 2003) say that an advantage of Nussbaum’s approach is that it has more potential to understand peoples' motivations then Sen's approach. Her list of capabilities is critized by scholars like Okin(Okin, 1989) for reflecting contemporary values and ideologies, rather than more timeless and universal ones. Okin is suspicious about the fact that the list has not been refined overtime, despite extensive cross-cultural research undertaken by Nussbaum since the development of the list.

## Freedom

Within the capabilities approach, Sen(Sen A. , 1999) has developed the concept of freedom in regards to development. He identifies freedoms as 'both as the primary end and as the principal mean of development[[7]](#footnote-8)'.He believes that development should be focused on removing any type of barriers to these freedoms and thereby letting people remain in full control of their agency. Similar to capabilities, freedoms can be related to each other, both as means and ends. For example if someone to has the freedom of political opinion and participation (end) one will be likely to have established the freedom of securing one's livelihood and income (means) and the freedom to be safe (means). As such, freedoms can be used as tools (*instrumental freedoms)* and as objectives within development approaches. Furthermore, Sen identifies that there are freedoms that are either present or not (*absolute freedoms*) - such as the freedom to live and eat - whereas there are also freedoms that a manifest themselves differently, depending on the context (*relative freedoms*). For example the freedom of earning sufficient income will be highly depending where one is living.

## Constraints and Critiques

Sen (Sen A. &., 1995) points out that *adaptive reflections* can bias perceived choices and opportunities, in both the conversion factors between means and their characteristics, and in constraining the choice between these freedoms and actual achievements. In cases where adaptive reflections are not created by an unawareness of the existence of the choice, Sen explains adaptive reflections, as part of the human coping system. They can help people living in extreme poverty to be able to relate to the lives of people with well of living conditions. As a result of this alienation, or simply the lack of awareness of the possibilities, people would not consider the full range of opportunities and possibilities but only the ones that they can identify within their context. He emphasizes that for capabilities and freedoms to be legitimate, they should be identified by the people who are exercising them. Alkire(Alkire S. , 2010) observes that this idea has complicated the utilization of the capability approach for policy development. Policies should be in the best interests of the individual and protect people in their basic needs, yet people might not be able to identify what needs to be included in policies to protect people. She advises that the effect of adaptive reflections should be mitigated through joint decision making by society. For this reason, the social choice concept plays an important part in Sen's approach, as capabilities have to be agreed upon through dialogue and democratic processes. Within these processes, firstly there would need to be an agreement on 'basic capabilities' - the capabilities of people to achieve their basic needs (Arrow K. J., 1997).

One of the main critiques of the Capability approach is that because of its undefined scope and holistic nature it is hard to apply it in ways that provide clear and strong evidence. This only gets more complicated when people want to use the approach on a larger scale (Vaughan, 2012). The more that is included, the more different types of data and methodologies are considered, the less accurate and precise the outcomes of using the approach will be(Robeyns I. , 2003).

As it is an opportunity based theory, preferences determining what possible freedoms or capabilities should look like could be non compatible with equity. However, awareness through interaction and democratic dialogue could according to Sen (Sen A. , 1999)aim at strengthening the overall agencies (i.e. morals and ethics) of people in order to make them adjust their choice in reflection of the wider needs and interests, such as for example for people that have expensive taste, say that they have not achieved a state where they pursue their wellbeing through an overall agency.

Another critique is that the approach does not pay sufficient attention to institutions as entities by focusing primarily on individuals (Robeyns I. , 2003). In this regard, (Gore, 1997) notes that there is a heavy emphasis on the individual within Sen's approach and that any type of group structure (state, community, family) is only observed in terms of how it affects the capabilities of that individual. This means that it is not able to capture value that might be in such structures, such as culture, language, morals, etc. In response, Sen points out that common structures are only as valuable as they are valued by individuals and therefore don't have an intrinsic right to exist or be part of an individual's life but only by choice of that person, as they are also not more than a means to achieve one's capabilities. A second criticism on the individual focus of Sen's approach is that actions of individuals almost always affect other individuals and that this is not captured in his approach. In a response, (Nussbaum m. , 2000)suggests that certain 'ground rules' need to be decided on and certain freedoms need to be limited in order to ensure no harm is done to other people's capabilities.

Gasper (Gasper, 2003)note that as Sen has developed his approach from a background of economics and philosophy, it fails to recognize the complexity of personal human development and growth from a social, psychological and anthropological perspective. Sen's approach seems not focused in these areas but instead tries to identify deprivations that obstruct fulfilment of a 'life people have reason to value'.

The actual impact of institutionalization of the approach has been another area of dispute. Pogge(Pogge, 2010) however states that although the Capability approach cannot be seen as having changed the way we are able to measure inequalities due to limitations presented in this section, the approach did contribute significantly to the social justice and distribution debate.

The manner in which the state should be actively safe guarding capabilities is another point on which debate is ongoing. On one hand scholars like Nussbaum and Alkire take a social justice and equity perspective saying the state should safeguard thresholds of people. On the other side libertarian capability scholars such as Nozick(Nozick, 1987) argue for minimal state interference with a prime focus on law and order.

Utilizing the approach to evaluate the quality of life, to inform policy, distribution of resources and opportunities to reduce inequities is also seen as problematic. Clark (Clark, 2009) points out that is difficult to detect beforehand which people have more effective conversion rates and thereby who could do with less in order to establish equal achievements, as people with more effective conversion rates will always have motive to conceal this.

Pogge(Pogge, 2010) raises questions about how capabilities can be weighed against each other and against non capability concerns. He questions whose responsibility it is to ensure that capabilities are provided or what to do when it is impossible to ever obtain certain capabilities. In response, Sen acknowledges that his approach should not be seen as a theory but an evaluative framework through which freedoms can be assessed.

The UNDP human development report and the OPHI approach only take limited data into accounting measuring people's well being, although the latter has does take more factors into account than the prior. This seems to contrast with the complexity and variety of capabilities described in Sen's approach. It may be difficult to fully deploy the approach in any large evaluative framework, as collecting the information required to do so could be seen as a deprivation on people's capabilities. There have been claims that Sen was initially hesitant towards validating the HDI for its limited scope. However he has stated that the HDI is by no means a holistic framework, but a milestone in proving that capability focused indicators can be used at scale. He has also stated that there should be more focus on utilizing the data that is already being collected, which focuses on outcomes rather than means in order to clearly stay away from the economic assessments that have been used to inform development approaches. He also believes that, as the paradigm shifts more towards measuring capabilities, research will focus and thereby provide additional data to fill current blank spaces. Finally Sen, points out that information collection in itself should always be seen as a mean and therefore is only important as it is needed for people to realize their freedoms.

## Application of the capability approach

The strength of the capability approach is that it allows the use of it to display relativity and contextual nuances. This is important as people's well being and quality of life often depends to a large extent on the context that they are living it in. For example to people earning the same amount of money could perceive their wealth in totally different ways if one lives in a context where this income provides sufficient means to provide both for basic needs as well as leisure activities, whereas another person may live in a place where the income is not sufficient to provide for a basic lifestyle, branding the person as poor. This may have a negative impact on her or his capability to secure basic needs, lead a stress free life, or appear in public without shame. The poverty assessment tool developed by OPHI has been built on this principle of contextual significance of capabilities. The capability approach itself does not evaluate to what extent capabilities can be realized at the expense of other capabilities. Nor does it try to respond to capacities that are resource heavy in their fulfilment as an effect of social norms established by society rather than the individual psychology conversion factor. For example well-off people living in places where there is a high crime rate must deploy considerable resources to secure their homes in order to have the capability of leading a safe life, compared with a person being in need of a large amount of resources to be able to move and access public life as a result of her or his disability. As such, Sen's approach assesses the manner in which capabilities are being achieved and how people are able to convert resources and opportunities into capabilities. Sen points out that the framework of ethics and values that a society lives by can be used to proceed and make judgements based on the outcomes of the capability assessments.

Alkire agrees with Robeyns and Veen(Robeyns I. , 2003) that it is difficult to measure whether people have access to a sufficient capability set or not because there is not a uniform understanding on quality of life around the world, yet everyone should be enabled to reach a level of life quality that is acceptable. They agree with Sen in that a single list of capabilities cannot be created because the place, time and context will determine which capabilities are relevant. In line with other Capability academics and practitioners, Alkire rejects any approach that is income based when it comes to assessing peoples' life quality.GPD per capita does not reflect the inequalities in wealth distribution, and this affects its utility. Also, it does not show any difference if components equally mitigate or aggravate from each other, which clearly would mean a difference in human inequality. Although life quality cannot be measured though looking at the distribution of resources, Alkire does recognize the positive affect access to resources has and therefore she suggests that indicators of quality of life could partly focus on this. She identifies 4 general features of the approach when applying it as an evaluative framework. First of all, its scope is very broad as it can include anything that can be defined as an achievement in its assessment. Secondly, it can both be used to measure inequity and whether people are able to meet their capability threshold but also to measure different levels of good quality of life, happiness and well being. Next, measurement can be achieved through relying on various data sources and methodologies as these indicators have been selected in participation with the people whose capabilities are being evaluated. Finally, people should be put at the core of the approach, both in design and focus. Sen's concept of Freedom (Sen A. , 1999) plays an important role in the way people should be involved, and which is defined by Robeyns as 'ethical individualism'[[8]](#footnote-9). This means that although social structures should not be disregarded, all processes should be seen in the way that they affect the individual. This also mean that group outcomes can be observed but that still the individual outcomes within those groups for all its members should be seen as the core focus, This has been a valuable approach when assessing households as they have specific structures in place in terms of power division, access to resources and roles and responsibilities for different members.

Subjective well being and happiness needs to be included but cannot, as done by welfarist approach, show the state of humans by themselves(Alkire S. , Concepts and measures of agency, 2013). However, well being and happiness is very hard to measure, let alone to aggregate. Taking Sen's concept of 'adaptive preferences' into account, Alkire states that although happiness of people is an important indicator in assessing people's quality of life, it can also been compromised by these adaptive preferences. An imprisoned Nelson Mandela received small glimpses of the mainland which probably gave him courage and happiness to endure his captivity on Robben Island. Someone who has never experienced captivity would most likely not perceive these moments as valuable in the way Mandela did. Less extreme examples can be found in for example the perception of freedom, and the happiness that comes with this. For example a child being able to do what they want after having had an authoritarian and liberal upbringing.

Measuring Capabilities can be much harder than measuring achieved functionings as we are not likely to identify all elements that contribute or prevent a person to be able to turn a capability into an achieved functioning (Alkire S. , The capability approach to the quality of life, 2008). Also, if groups systematically do not fulfil their functionings, one could assume that there are some limitations to their capability in this regard, unless there is a clear and concise reason for this not to happen (a choice for example in not eating meat). Alkire agrees with Sen in the sense that satisfaction should both be seen as a positive indicator for happiness of life itself and also as an indicator of whether other capabilities are being met. Taking these things into consideration when looking at the applicability of the capability approach as an evaluate framework for measurement of quality of life, Alkire suggests that perceptive and subjective evaluations remain an important part of the evaluation although they will need to be filtered on adaptive reflections. The way in which this can be done is not agreed upon within the approach, and therefore it can be challenging to use this evaluation for policy development. A way to 'filter' evaluation findings would be to assess perceptive and subjective outcomes against other outcomes that have a greater potential to be objectively verified, for example by not only measuring people's happiness but also their income or health status. Alkire also agrees with Fluerbaey(Alkire S. , The capability approach to the quality of life, 2008) that because adaptive reflections affected subjective perceptions of achievements, satisfaction or happiness should be seen as people having been manipulated in making their decision, as they did not have the full and accurate information to do so. Therefore, ensuring that people do have access to full and accurate information is crucial in reducing the effect of these reflections.

With regard to functionings, there can be no permanent weight or value attached to certain functionings, as this is depending on which functionings are included in the evaluation and how the weight should be composed across them at that time and place. Finding more objective reasons will have to be achieved through research or factual information, combined with subjective value statements from people which validate each other. Therefore the capability approach as an evaluative framework is a highly participatory method.

Finding ways to evaluate capabilities, Alkire agrees with Robeyns and van der Veen (Alkire S. , Concepts and measures of agency, 2013) that a lack of capabilities can be detected by looking at structural differentiation in achieved functionings amongst people, establishing whether possible choices not to achieve these functions have been made.

When evaluating the quality of life through the use of the capability approach, Alkire acknowledges that there will always be bias due to subjective elements in the choice of dimensions, the level of importance that these dimensions will be given, and the effect and relation that these dimensions have with each other. The capability approach would not consider this, and different measurements can provide different results and groups can be lumped together. For example on a poverty index, while within poverty there can be different levels of poverty and quality of life if different indicators are (and should be) applied. Ingrid Robeyns(Robeyns I. , 2006) has undertaken efforts to provide the capability approach with more academic validity by stating the need for strong rationale about which indicators are used to measure which capability and why. Also the nature of the capability list should reflect the purpose it has been designed for, and the methodology and rationale should both state an ideal scenario and a pragmatic realistic version of this scenario so that limitations are evident. Alkire's work on the OPHI approach is another confirmation that the capability approach has potential to be applied in the field of human development. While developing this approach, Alkire and colleagues recognized the difficult balance that has to be made between doing justice to the depth of the concept of quality of life, and at the same time ensuring that it can be feasibly measured.

Alkire identifies 7 broad quality of life dimensions: Health and Security, Understanding, Achievement, Participation, Relation, Satisfaction and Harmony[[9]](#footnote-10). Attention must also be given to social and institutional processes that are relevant to the development of the quality of life. When coming across processes that conflict with each other, inferior ones should be identified and ruled out as far as possible. As such, Alkire concludes that the measurement of quality of life through the use of the capability approach must be understandable, straightforward and easy to justify as the measurements could guide policy.

## The Alkire- Foster method (OPHI)

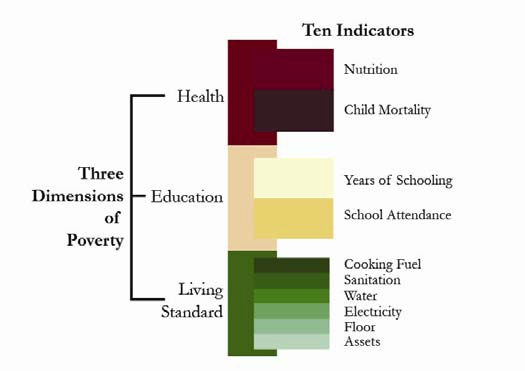
[[10]](#footnote-11) In order to be able to measure poverty by applying the Capability approach, Alkire and Foster developed a tool in 2007 that allows the measurement of multi dimension poverty to be conducted on a large scale against clear and verifiable indicators. The tool measures people's status through ten indicators across three dimensions of poverty (see figure 2). Each of the dimensions are weighed equally in the equation, so therefore the six indicators under living standard individually weigh 100/3/6= 5.556%, whereas the two indicators within education and health individually weigh 100/3/2= 16.667% of the total. This approach allows examination of the amount of people that are living in multi dimensional poverty and the intensity of this poverty. This allows for insights on a larger scale with regard to who is poor and in what way/ to what extend are they poor or in danger of becoming poor. A person is classified as suffering from multi dimensional poverty if she/he is deprived in more than 1/3 of the OPHI indicators. People suffering from deprivation in more than 50% of the indicators are marked as suffering from severe multi dimensional poverty and those between 20% and 33% are classified as being vulnerable to descend into poverty.

Figure : OPHI indicators

## Education and the capability approach

The capability approach provides an alternative way to look at education. Instead of looking through a resource or input based focus, the capability approach examines what opportunities the available resources offer with the present conversion factors. How the capability approach is used to examine education will depend on which perspective is taken. For example whether educational capabilities should be determined and education seen as part of the social justice system for providing equitable opportunities for all people in the society, (as suggested by Nussbaum, Walker and others) or should it be left open for people to decide within the broader framework of the approach as suggested by Sen. The capability approach does not provide answers as to how to solve issues with regards to Equity and Access to education, quality and relevance of education and obtainment of learning outcomes. But it does provide a way to look at the extent to which children can access, and use education to strengthen their capabilities (Vaughan, 2012).

In general, any capabilities or indicators that could be developed to measure education will completely depend on what is viewed as the purpose of education. A focus on capabilities would require us to evaluate satisfaction with individual learning outcomes, and to question the range of real educational choices that have been available to children; whether they had the genuine capability to achieve a valued educational functioning (Vaughan, 2012). The purpose of education should be seen as a means only to access capabilities. Keeping this in mind, one could for example look at girls' education through the perspective that even if the access and learning is equal to boys’ the access to capabilities through education remains unequal. Girls have far less chances to capitalize on their learning after completion of their education in the way that boys can. Robeyns(Robeyns I. , 2003) states that although education should be seen as a means to accessing capabilities, the purpose of education could be regarded as a capability in itself. As such, the capability approach can be applied within education to expose multi level inequalities and thereby guide adjustments to the system(Vaughan, 2012). Seeing education as a means rather than an end also is important in recognizing that it does not have an intrinsic value by default but this depends on what it includes. For example, bad formal schooling can have a dismissive effect on existing capabilities and cause 'unlearning' which may not be captured by a monitoring and evaluation framework unless a student drops out or has to repeat a year(Nussbaum M. , Education and Democratic Citizenship: Capabilities and Quality Education, 2013). The damage done to their capabilities and functioning should be identified and the factors that can diminish capabilities for certain groups should be identified when examining their access. One could however argue that such negative elements should not be seen as education but as deprivations that wrongly claim to be education.

The capability approach seems suitable to measure equity as it focuses on what it will take for people to be enabled to have equal option of choice with similar achieved functionings when they opt to do so. Furthermore, the capability approach can be used to define the level of choices people will need to have in order to establish the minimum enabling conditions with regards to quality education, as anything beyond these conditions would also fulfil that.

Nussbaum (Nussbaum M. , Education and Democratic Citizenship: Capabilities and Quality Education, 2013) emphasizes the importance of education as a mean to enable critical thinking and active engagement in people's social context and the larger society. She also observes that current debates often take a narrow approach by focusing on basic skills such as literacy, science and maths. Nussbaum takes the concepts of education developed by Tagore (1961) and Dewey (1859-1952) when stating that the main purpose of education is to enable children to become active, empathizing and engaging citizens of their society. To be supported and motivated to experience the freedom in developing and imagining thinking and understanding feelings. For this reason Nussbaum argues that education should ensure that children get motivated to apply critical thinking, reasoning and examination about anything presented to them and not take any information without questioning it. Furthermore, education should provide children with awareness and knowledge on the diversity and similarity of humans and societies, developing understanding on differences between and within cultures, ways of living, histories, and traditions, while appreciating the complexity of these differences. Finally, children should acquire what Nussbaum terms as *narrative imagination[[11]](#footnote-12)*, which means a combination of emphatic ability to relate to a person's situation and motives other than your own and being able to analyze these motives. She believes that arts are the most suitable curriculum to enable this within students. To establish this, education should always be child centred; sensitive to her/his needs, and contain sufficient elements of joy as this has been proven to be a forceful motivator.

One important aspect of the capability approach when aiming to use it to evaluate a context is that it is not outcome based but rather opportunity based; the main questions are not whether somebody has achieved a certain state of well being but whether somebody has the choice to do so. A good example is given by Sen(Sen A. &., 1995) that for example somebody choosing not to pursue a certain opportunity (basic capability) can lead to fulfilment of a higher capability, Robeyns(Robeyns I. , 2003) presents the example of the choice not to wear fur to make an animal rights statement in this case. Taking an education scenario as example, you could perhaps think of people making an ethical choice to send their children to public school even though they have the choice or opportunity to send their children to a private school which may provide better education and learning outcomes for the children.

As discussed previously, Sen's understanding of the approach provides a broad framework that should enable people to identify their functionings and capabilities. However, this is complicated when the capability approach is applied to a particular research question, or to compare well being. Nussbaum’s list of capabilities tried to address this issue and should not be taken as a final product but more as guidance to provide a capability framework (Stein, 2009).

1. **Equity in education**

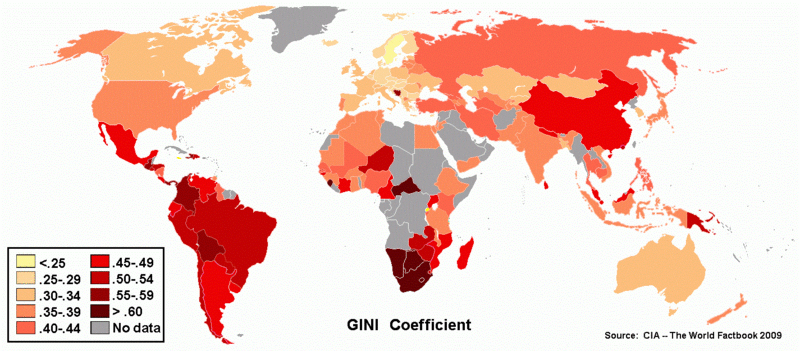
**"For to him who has will more be given, and he will have abundance; but from him who has not, even what he has will be taken away”. (Matthew, Ch. 13:12)**

When examining education through the capability approach, two main questions emerge; do all people have genuine access to education in order to achieve their functionings? (Equity) And does the education provided enable people to do so (Quality). Despite the achievements in increasing access to education internationally, issues of equity and quality remain salient. Average numbers hide often widening disparities between certain groups of children remaining out of schools. Averages also hide the large numbers of children that have accessed education not obtaining desired learning outcomes. Furthermore, in the current situation of the rapid expansion in population and the ongoing global economic recession the most vulnerable will disproportionally suffer from worse access to and quality of education (UNICEF, 2013). Hence, this chapter will further examine the concepts of equity and quality and how they manifest themselves in education.

## The concept of equity

Whereas equality refers to an equal distribution, equal access and equal treatment, equity is based on the foundation of human diversity. Rather than providing the same to all, it focuses on the outcome of people being able to convert what is provided to them into equal outcomes. The provision is likely to be unequal as different people will have different needs based on their capabilities to reach the same situation. Equity can be seen as the evolution of equality. Liberal scholars and resource focused practitioners would probably disagree with this statement, as it builds on the concepts of the *social contract* within the theory of *justice* as was developed by Emmanuelle Kant and further worked on by John Rawls and others. The core of equity is often described as *fairness* in the sense that it aims to establish true equality, rather than equal access to opportunities, resources, rights, fulfilment of basic needs, etc.

Equity is firmly rooted in development approaches and theories, and mainstreamed by governments all over the world as people are being recognized to be right holders to which the government is accountable, rather than subjects with the purpose to serve that government, although this is at a very different pace in different countries, and in some cases still hardly or partial. The Capabilities Approach as developed by Sen, Nussbaum and others and applied through initiatives like Akire's OPHI has a strong equity focus as scholars like Nussbaum have developed their capability theories from a social justice perspective. Within development, equity has been assessed on a large scale through the development and application of the Gini coefficient. This has become the common tool to measure the unequal distribution of income and wealth within countries.



Equity can be seen as both 'equality of opportunities' and 'equality of results' which will have different policy implications when taken on by governments. The extent of equity in a society being the result of the 'choice' of society has gained popularity over the last decades. It is endorsed by scholars such as (Meerman, 2008)who recognize social exclusion being the result of societal developments, such as stigmatization, ethnic differences and people being awarded a low or involuntary minority status.

## Dimensions of equity

Equity or rather the lack of it being present can be seen through a number of dimensions. These dimensions have a complicated relationship with each other in terms of how one can affect or even cause another and are rarely observed alone. The literature identifies five categories on equity. However, a sixth one has been added:"violence" as scholars such as Dewey and Salmi (Nussbaum M. , Education and Democratic Citizenship: Capabilities and Quality Education, 2013) make a strong case for this.

**Socio economic status**

Disparities between people of different socio economic classes have widened despite peoples' awareness about the living conditions of people all over the world and the effect of politics, and economic measures, internationally, as well as the global push to end extreme poverty and secure basic needs for all people by 2015 under the flag of the Millennium Development Goals. The recent global economic recession/crisis has merely accelerated this process. As an illustrative comparison, currently 50% of the world population only accounts for 1% of the global wealth, a large percentage of this 50% living in Asia (UNDP, 2013).More than just lack of income, poverty should be seen as the vulnerability of a person to lose well being or experience decrease in capacities due to a change any of the conversion factors (personal, social or environmental. For example, a person loosing the ability to walk will suffer a loss in capabilities, depending on amongst others the need to be able to walk for securing food (personal), the perception within his or her community towards disabled people or the gender specific expectations towards that person that are affected by his or hers mobility (societal) and the geography of the surrounding (environmental). These factors are often interrelated with for example a person living in a place where it is impossible to move around without being able to walk (environmental) but that person having sufficient resource to hire other people to support him or her in daily life (personal)(Clark, 2009).

**Geographic location**

With regard to looking at geographical location as an equity dimension, we have to go beyond just looking at the actual location that people live in but also how it affects their equity status as being part of a broader location(International Geographical Union, 2010). First, a direct location could be identified, containing a number of features and presence of resources. For example someone living by the ocean with a forest nearby will be likely to have an increased access to a higher diversity of resources to sustain their livelihood and strengthen the quality of their life. However, this direct surrounding should also be seen in the larger context surrounding. An important segregation is made between urban and rural surroundings. Although urban areas carry a significant higher level of disparity, they also represent a conglomeration of services and opportunities with a far higher density than can be found in non urban areas. Therefore this automatically raises the issue of inequitable access to fulfilment of 'needs' and 'wants'. Beyond this, there are other features that determine the geographical location features that affect someone's equity status - being part of an area, region, state and part of the world. For example someone coming from a district that is considered to be highly deprived and backward by others may face inequities because of others’ perceptions, even if other equity dimensions such as income or ability do not give cause for this. The same can be observed in the case of immigrants and how part of their unequal status is related to their origin location. This may help to explain the reasons why immigrants from the Netherlands received a warm reception when arriving in Denmark in the 1950s as they were perceived as coming from a similar culture and mindset by default, while immigrants from Africa experienced a very different welcome in general as they were much more perceived as foreign and different. Of course in many ways this can also be applied to personal features and culture, but location does establish assumptions of a person in relation to the other equity dimensions.

Although scholars like Murshed argue for recognizing globalization as a separate dimension of equity (Murshed, 2002), it is considered in this paper under geographical location as it is the change in perception, interaction and action of people that affects people’s equity status based on the ways they view themselves and others as part of the global scene. One could argue that this is more suitable to appear under the heading of culture, however it seems more a common phenomenon that is observed by different cultures rather than that there are different versions of globalization existing in different places of the world. This phenomenon should not be seen as either having a default positive or negative effect on people's equity status but bringing about a specific type of opportunities and marginalization that is directly linked to the geographical location. Historic developments that have similar features to globalization in that they have gone beyond national context by creating larger contexts, (such as colonialism and explore and conquer expeditions), will be considered as within the culture dimension. Their effects are more specifically with regards to equity of people involved on a case by case basis.

**Gender**

This dimension is defined in this context as the barriers and expectations that affect someone on the base of her or his sex. Research (The World Bank, 2008) has shown that the negative effects experienced based on someone's gender can affect all of the other dimensions listed above. For example girls will experience harsher forms of inequity when they are poor, disabled, and living in remote areas than boys in similar circumstances. Transgender people and people otherwise identified with regards to their gender should not be excluded should be identified as extremely marginalized with regards to equitable opportunities in life. Gender and sex are often mixed up in the way that equity and equality or impairment and disability are, and therefore deserve a short clarification. Whereas sex refers to the physical specifics relating to reproductive organs and features of somebody, gender refers to the identity of being a girl, women, boy, men or otherwise specified gender category.

**Ability**

The definition of (dis)ability is probably the most ambiguous dimension of equity as it is the hardest to define and is often controversial (The World Bank, 2008). Recognizing the complexity of conceptualizing disability in relation to equity, this paper will follow the categorization provided by (Gronvik, 2007) in which he identifies 5 ways to define disability[[12]](#footnote-13):

* *Functional,* seeing disability through the physical and mental limitations that the impairment creates for the person.
* *Relative or environmental,* recognizing that the person's physical or mental limitations only become a barrier if the context or surrounding creates barriers
* *Social,* when perceptions and consensus on how people are seen and categorized can lead to assumptions and stigmas with regard to disabled people.
* *Administrative,* in the sense that people with disabilities are classified, often in relation to for example being able to support them consistently on a larger scale by the government or advocacy campaigns.
* *Subjective,* by taking the person's own perception as the starting point of defining the disability, also taking other personal features into account such as gender, ethnicity, age, etc.

Gronvik (Gronvik, 2007)observes that these different definitions are the result of different reasons to consider disability. The functional definition for example is usually undertaken with the focus on rehabilitation or support of a person, therefore the prime focus is on the direct barriers that are caused by the impairment. The environmental, relative and social definition recognize the person first and foremost as a social being and view impairments in the way that surroundings cause them to be an issue. As stated above, the administrative definition is used with the purpose to document and classify disabled people in order to create or influence relevant policy and support. Context also plays an important part in this definition, for example with regards to common trauma, such as a civil war. Examples of this can be seen in the way that Cambodia has a relative high number of categories of physical disabilities as a high number of its citizens lost limbs in the war. This can be compared with Jamaica that only has one definition in its legislative framework. Although often being a more black and white version of it, administrative disabilities do reflect the collective perception within the society they are created for. If they did not, they would face constant pressure to be adjusted. Welfare states often have more detailed and segregated definitions of disabilities than other nations (Gronvik, 2007). Finally, the subjective definition recognizes the role of one's own perception of the disability as well as the effect that this disability has on living amongst others as a women, old person, immigrant, etc. An additional dimension in this definition is introduced by McCall (Gronvik, 2007), which is described as *intercategorization* and focuses on the relations between the different categories rather than on the effects of belonging to one. However, it should be noted that in reality this would create such a high variety of groups to be considered that practical implementation would become impossible. Considering categories gender (3), Caste (63) and age groups (let's say 7) alone, analysis would be concerning the relations between (3X63X7=) 1323 groups alone. It is preferable to examine a combination of all these definitions of disability through the capability approach, with exception of the functional and administrative definition, as disability should be seen in the ways it deprives people from realizing their capabilities in the individual, societal and environmental sphere. This should lead to ways of defining the support necessary and interventions needed from the state and society (administrative) as well as on an individual basis (functional). Gronvik (Gronvik, 2007)recommends a combined theoretical and empirical approach towards conceptualizing disability. In addition, disability should be viewed and defined within context, making universal definition unfeasible. For example someone living in a remote village where things like healthcare, education and work are all a considerable distance from each other, losing a foot is a far more disabling, than for someone living in an urban area with sufficient income to rely on a good public transport system present. In addition, Gronvik (Gronvik, 2007)states that categorization will always carry the risk of producing further institutionalization of inequalities.

**Violence**

As stated earlier, this paper includes violence as a separate dimension. However, (Salmi, 2006) identifies it as a phenomenon that can take structural forms and even be institutionalized within cultures. As such Salmi[[13]](#footnote-14) identifies the following types of violence:

* *Direct violence,* being the most common referred type of violence, it includes any type of deliberate action or withheld of action that results in any type of harm done to other people at all scales and levels of institutionalization.
* *Indirect violence,* including all types of violence where there is no direct link between the people/groups experiencing this and the ones causing it. Within this category, Salmi further defines *violence by omission*, focusing on the lack of the intervention by a third party to prevent violence and *mediated violence* as a deliberate action to alter context or environment resulting in suffering of other people. The difference between these two forms of indirect violence is the prior being a passive form and the latter a active or deliberate form that does not have causing the violence as aim and thereby differs from direct violence.
* *Repressive violence,* referring to a context (often regime) that limits the freedoms to exercise peoples' rights. In a way this type of violence can be seen as a form of direct mediated violence but Salmi singles it out as a separate category as it has specific features in the way it is established, maintained and addressed.
* *Alienating violence,* finally refers to the denial of fulfilment of someone's capabilities in the broader sense of the word. For example denying someone the chance to root in a cultural tradition or not providing stimulation to young children in terms of their overall development or creative arts. Educationalists such as (Robinson, 2006) argue that the contemporary education system is designed in ways that promote this type of violence.

Violence by omission can be seen as wider than the lack of intervention in cases such as wars or brutality. Poverty is identified as violence by omission as the authorities or society do not properly intervene in ways to end the suffering people experience. Another example of violence by omission is, such as the lack of protection of people from the negative effects of climate change or epidemics. It is for example estimated that currently, [HIV/AIDS](http://www.sos-usa.org/About-SOS/what-we-do/health/hiv-aids/Pages/hiv-aids.aspx) has orphaned 17.9 million children, most of them in Sub-Saharan Africa and Southeast Asia, one in five children living in developing countries is [severely underweight](http://www.sos-usa.org/child-mortality/child-malnutrition/Pages/default.aspx), and 22 million children are refugees or internally displaced, forced to flee their homes because of violence or natural disaster (UNDP, 2012). Mediated violence has been seen in international trade agreements or embargos that caused groups or populations to experience negative impacts on their quality of life. When looking at the presented types of violence through the theoretical perspective that this paper has adopted, one can see a strong relation between the presence or absence of violence and the freedom of not experiencing violence or fear for violence. This will undoubtedly have a direct negative impact in the conversion of capabilities into achieved functionings. Also taking equity into account, the same amount of violence of any type causes large unequal outcomes in terms of the harm and suffering it causes to different people. This is directly linked to the manner in which people are affected in terms of inequities in the other dimension presented. For example, an environmentally insensitive legislative framework can result in highly polluted rivers by industrial waste, which will cause the greatest harm for people living closest to the river (location). They are also likely to not have the resources to access alternative drinking sources or move to better locations (socio economic). In addition, girls and women are expected to o the laundry of the household, and thereby have daily direct contact with the water (gender).People that cannot walk to the clean water provision 500 meters away from the river are adversely affected (ability). At the same time, this situation can contain elements of violence by omission as the state may have taken a passive attitude to protect its citizens. Also the industry producing the waste commits mediated violence as it was aware of the harm the waste could do, but preferred unfiltered release in the river instead of using expensive filtering systems. Oppressive violence could be committed if this was happening in a society where laws prevented people of certain castes to access the alternative clean water sources as they would spiritually impurify the water. This could result in direct violence against these people by society if they challenged these laws and traditions. Alienating violence in this regard could perhaps be the lack of an environmental conscious curriculum. Through this, a national consensus could be created that this type of pollution is not acceptable and the legislative framework could be changed accordingly through lobby, campaigning or activism.

**Culture**

As a final dimension of equity, culture should be included. It is beyond the scope of this paper to provide an in depth discussion on the concept of culture from different schools of thought. Instead, a more comprehensive overview will be given on the identified implications that culture can have with regards to equity. To do this7 elements[[14]](#footnote-15) are identified, acknowledging that there are many other ways to categorize culture elements into a different number of aspects:

* *Communication,* this includes language(s) and symbols.
* *Governance, norms, values and means of identification,* including the legislations, rules, regulations and type of rule that are formally in place, as well as the non formal norms and values as seen through a justice perspective.
* *History, and traditions,* although often norms and values are rooted in history and traditions, they should be seen as separate. History and traditions are more rigid in their existence whereas beliefs and values on which norms are often based reflect more dynamic components of culture.
* *Innovation, knowledge, creativity and technology,* including all that is related to learning and transferring of existing knowledge as well as the response to new knowledge and ideas.
* *Material*, concerning anything material being produced or used by the culture.

An equity focussed capability approach mainly focuses on the manner in which people are allowed to identify and be part of the culture in an equal manner in relation to other people living in this culture. However capability scholars such as Nussbaum (Nussbaum M. , Education and Democratic Citizenship: Capabilities and Quality Education, 2013) also clearly emphasize that empathy, (self) reflection and the ability to live with and amongst people that belong to any culture should be a core component in creating a just and fair society where people can pursue their full potential with regard to their capabilities. For this, Nussbaum identifies education as the main vehicle to ensure people internalize those characteristics.

## Opposing theoretical perspectives on equity

All these dimensions lead to people establishing unequal achieved functionings with regard to their capabilities and therefore becoming marginalized in different ways. It should be noted that there are also theories, such as *social Darwinism* that explain 'unforced' marginalization by people of themselves, as equity measures can be seen as contradicting the concept of natural selection. There are even darker theories, when viewed from an equity perspective that explore intentional marginalization for the better of the human race. An example of this is *eugenics* which provided a theoretical base to sterilize over 64,000 people in US in the first part of the 20th century as they were judged unfit to reproduce. This was followed by the even more gruesome practices under the Nazi regime with regards to genetic selection of humans (Barrett, 2004).

## Equity in education

Having explored the concept and the dimensions in which people's equity can be affected, we now examine how this translates within education. Literature has been produced over the recent decades to review the status of equity in education and suggest strategies to reduce inequities. This is to ensure that all children have access to equitable education as per the Universal Declaration of the rights of the child that was signed in 1990 by 193 countries, and thereby is the broadest agreed human right bill in existence(CRS, 2013). As a result of this, international organizations and governments have proceeded to develop their definitions of equity in education. For example the United Nation's definition of equity is *"that all children have an opportunity to survive, develop, and reach their full potential, without discrimina­tion, bias or favoritism*” (UNICEF). Despite the increased attention to equity in education, many countries proceed with the strategy of providing equal opportunities, rather than equal outcomes (Hutmacher, 2002).

Equity will always be linked to diversity, as without diversity, equity would equal equality. Diversity should be seen in the broad sense of the term, including the areas of socio economic status, gender, age, ethnicity, religion, and physical/mental ability. Equity refers to the fair treatment of all people despite their differences, to ensure all have equal opportunities. Within education, this aim has been established through the introduction of inclusive education, meaning that education is based on the principles of acceptance and inclusion of all students. Students see themselves reflected in their curriculum, their physical surroundings, and the broader environment, in which diversity is honoured and all individuals are respected. Therefore “Inclusive education is central to the achievement of high-quality education for all learners and the development of more inclusive societies. Inclusion is still thought of in some countries as an approach to serving children with disabilities within general educational settings. Internationally, however, it is increasingly seen more broadly as a reform that supports and welcomes diversity amongst all learners[[15]](#footnote-16)".

The concept of equity has been firmly placed in the international scope of education with the adoption of the Millennium Development Goal on Education for All (MDG/EFA) and the universal declaration of the rights of the child by the UN. Equity in education is recognized as a priority as it should be provided from a rights based perspective. It has been proven to have a direct positive outcome on other indicators with regard to the quality of life, such as socio economic status and health. Furthermore, it is recognized that equity in education has two dimensions. The first is a broader dimension that is concerned with overall sufficiency and relevance of the provisions for children to enrol, participate, learn and complete within education. The second is a narrower dimension that focuses on specific groups that structurally do not accomplish the general levels of enrolment, participation, learning outcomes and completion (Levin, 2003). Besides this, it is observed that although gender as an equity focus has seen decreasing parity between different genders, it should still be considered as an equity dimension as the overall opportunities in life in most countries remain divided between men and women on an inequitable base.

## Education seen through the equity dimension

Levin (Levin, 2003) sees three focus areas when it comes to equity in education. The first is to examine the distribution of resources within education and linked to education. For example ECED[[16]](#footnote-17) access in itself, as well as access for mothers to put children in ECED child care in order for them to participate in the labour market. Second, to focus on the equity of people who are expected to perform less well in education when provided with equal opportunities and resources, such as second language or non native speakers, or children with disabilities. Finally, girls and women have been shown to achieve equally and often better than boys when provided the same opportunities, however they still face inequitable conversions of these achievements in income, career, opportunities, etc. With regard to that last point, Levin (Levin, 2003) observes that a large part of the inequities within the education system can be seen as being caused by external institutions, namely family, socio economic status, language, ethnicity and immigration status.

Looking beyond the capacity of a system at the earlier defined will to increase equity, it should also be established whether the purpose of education has been stated in the legislative framework and supporting policies. Education can be seen as creating a dutiful workforce feeding the industrial revolution labour demands (Robinson, 2006)It remains a means to consolidate the welfare and status of privileged groups in society at the expense of others.

Looking at the developments in education at a global level through an equity lens, a number of common challenges in addressing these areas can be identified. First and foremost are the constraints of resources versus the intensive and expensive measurements needed to ensure inclusion of all children. These are resource intensive as the ones that currently remain out of education face multiple barriers in terms of access. At the same time, governments need to utilize their resources in increasingly cost effective ways as the global push under the MDGs has caused a large increase of children that are included in education. The second main challenge detected in many countries is the equity question that surrounds the funding and access of secondary education. Transition rates have shown that a considerable number of students complete basic education, but do not enter secondary education, and another half of these students do not enter tertiary education. In the case of Nepal, 75% of children do not enter secondary education. A large percentage of these students belong to groups that traditionally face barriers, such as children from low socio economic backgrounds, certain ethnic and religious groups that have faced or are facing forms of discrimination, children with special needs and girls. Governments in many countries, utilize considerable percentages of their national budget to fund education, and critics point out that this could be seen as utilizing public funding (that has been generated from the taxes of marginalized and non marginalized people) to provide education for the more better off part of the society. An example of this is in Latin American countries, and it should be noted that this is not the case in Nepal.

With regard to the effects of ability on equity in education, policy makers have taken on the debate about on how to include children with disabilities. Yet, there has been little systematic empirical analysis on which to base this policy. This is largely due to the lack of appropriate and comparable data and of a strong co-ordinated view amongst policy makers on the preferred strategy. There is little evidence that youth with disabilities are generally more or less likely to live in rich or poor households, but it is clear that children with disabilities are substantially less likely to participate in schooling, leading to obtaining a lower socio economic status on average at a later stage in life. Children with disabilities are less likely to start school, and in some countries they have lower transition rates resulting in reduced schooling attainment. Disabilities have been identified as affecting a relatively small percentage of children worldwide but causing a level of inequity that goes beyond the other dimensions that were earlier mentioned. It should be noted, however, that although socio economic disparities, and poverty in particular, contribute to inequity, they are not the main cause. Countries with a relatively high living standard still observe large inequity in learning outcomes.

Levin (Levin, 2003) states that the barriers to education are often easy to identify but difficult to remove. He sees two main areas in which barriers can be both created and removed, namely 'will' and 'capacity'. Will in this regard relates to the motivation or resistance of people, groups and society to change the current scenario to increase equity. Capacity should be seen in the broad sense of the word, for example in terms of resource capacity (number of schools/ classrooms that can be constructed to cater the need of students) and human capacity (number of teachers available to provide education). There can be grey areas identified where these two concepts overlap, such as for example religion or tradition (should the resistance to for example send girls to education due to religious convictions be identified as non willingness or the lack of capacity to do this). Furthermore, there is a strong linkage between the two as the will often directs the volume of the capacity, and also the available capacity will inform and shape the will. With regards to equity and policy in education, there is often a scenario of capacity constraints and, as a result, limited will.

Children with special needs face another common challenge caused by the fact that fully enabling them to claim their right to education often requires an substantial increase in resource deployment (think for example of children that have multiple disabilities, or the printing and distribution of school books in Braille language for blind children). Besides this, another capacity constraint is often faced in terms of having sufficient knowledge and skilled teachers available to cater to the needs of these children. This challenge is further increased by perceptions, lack of knowledge and beliefs that might persevere within communities and societies that stigmatise these children. In Nepal for example, it is traditionally believed that bearing a disabled child is the result of a sin committed in a previous life by the mother.

Violence in education affects girls disproportionally and therefore a lot of attention has been directed at the concept of violence against women and girls in education. Private and isolated locations become perceived danger zones that consume energy and discomfort in terms of avoidance, perceived threat and stress in less severe scenarios, and cause traumas and severe stress and depression, severely damaging the integrity of the girls in cases where these threats turn into violence against them. An example of this has been the growing recognition through UNICEF's WASH initiative and other campaigns that separate toilets for girls represent more than just the physical function they have but also allow girls privacy and safety to avoid being harassed or stigmatized when they are menstruating.

In terms of the global picture of inequality in education, the World Bank[[17]](#footnote-18) identifies four main findings in terms of the distribution and presence of barriers to equity: (i), the gaps associated with economic status within countries can be as large as, if not larger than, differences across countries, (ii), the schooling attainment patterns that give rise to these inequalities vary substantially across countries, suggesting that country specific policies will be the key to addressing the identified shortfalls, (iii), inequalities associated with economic status are typically larger than those associated with other commonly cited sources of education gaps, in particular gaps associated with gender and orphanhood and (vi), while affecting only a small share of the population, disabilities is associated with very large education deficits.

## Equity in educational policy

When looking at policies that have a focus on equity in education, it can be seen that they are formulated on the basis of what people and policy makers perceive as inequities and the causes of these. It was earlier mentioned in this paper that that equity can be seen both in terms of 'equality in opportunities' as well as 'equality in results', and that the implications of policy makers adopting one view over another will have significant consequences for the way equity in education is incorporated within the education policy. Equality of opportunities should not be regarded as the opportunity to enrol in education, but the opportunity to complete education in ways similar to other students. Otherwise we would return to a liberal viewpoint focused on resource distribution rather (equality) than seeing them as means to establish equal opportunities and functioning (equity). In reality, most countries have adopted equity within their education policy framework in ways that lie in between these two conceptualizations. In this regard, genuine equity policies are likely only to be developed in times of economic and social change (Teese, 2005),.The context of these changes should be recognized as often they will also direct the purpose of the policies as well as the increase in equity within education. In recent years, the concept of providing education through a rights based approach has been mainstreamed in the educational development initiatives(UNICEF, 2007)

## The Quality of education

There is an active and ongoing debate of what quality education should look like in terms of content and methodology and in respect to the resources and scope needed to establish this. An extension of this discussion focuses on how quality education can be measured as measuring education itself carries the risk of presenting an incomplete picture of the achieved learning outcomes. It may even start affecting the quality of education provided, as we have seen in examples of standardized testing such asunder the 'leave no child behind' national education initiative in the US (Crawford, 2004).Children were schooled to pass the exam, as opposed to being educated in a more general sense. Furthermore, Salmi(Nussbaum M. , Education and Democratic Citizenship: Capabilities and Quality Education, 2013) observes that testing in education can cause a student that structurally fails to be marked as a failure in the wider societal sense. For example students that drop out of school are stigmatized as the measurement of success in completing your education is referred to at several important points in people's lives, such as when they are looking to take on a job, or establishing social relations. In this section, the quality of education is examined from the perspective of the purpose of education. Using the capability approach, the purpose of education is to ensure that all learners are enabled to fulfil their capabilities and that they become part of a just and fair society in which they allow others to do the same. As such, education has to be seen as a means to establishing learning outcomes and fulfilment of capabilities but should not be considered to carry intrinsic value as such. As stated in the introduction of this paper, there has been a significant number of children enrolled into education over the last few decades, but there has also been a large increase in children that are currently in school but without sufficient learning outcomes. In other words, education can only be treated as the means to unleashing capabilities if it is of a minimum quality. Education without quality should be seen as having a neutral value. Scholars such as Smith Bennet (Bennet, 2006) go beyond this definition and state that education can and is used to strengthen equalities as well as inequalities. Education re-creates a society where children learn the social norms, rules of engagement and to be part of a social group other than their family. Smith (Smith, 2006)believes that it is crucial to focus on establishing inclusive and quality educational environments as children’s future social development and learning with regards to society, interaction and communication with be structured by this. In general, quality of education depends on the governance and management of education at all levels, the teacher professional development and management, the curriculum and the learning environment.

Smith identifies the curriculum and the teacher as the key elements to ensuring inclusive and quality education and composes a list based on the research of Throsby and Gannicott (Smith, 2006). They suggested that quality education needs[[18]](#footnote-19):Trained and motivated teachers, instruction in the student’s mother tongue, sufficient attention to health and nutrition and strong, decentralized education management.

Nussbaum and Salmi (Nussbaum M. , Education and Democratic Citizenship: Capabilities and Quality Education, 2013) state that one of the core components of quality education is a strong focus on tolerance, empathy and self reflection. These are the crucial components of creating citizens that will contribute to an inclusive society that thrives to establish quality of life outcomes for all. In addition, quality education should include dealing with ongoing debates and topics from the society it is positioned within, enabling children to prepare themselves to become part of these discussions and debates and seek solutions and ways to make society function in a fair way. Salmi also states that this needs to be done with respect to the culture that people bring when they enter education, with language being an important component of this. In cases where one language is preferred, others are usually considered inferior or even banned. As language is an integrated part of the culture it comes from, this automatically carries a negative judgement to the personal cultural heritage of non native speakers or children that speak a local language compared with the national language. Current education systems and curricula should be scrutinized to identify topics that are still delivered in ways which foster the opposite mentality amongst children. For example the way the concept of nations is usually presented in a way that it implies the inferiority of other nations and thereby conditions the minds of children to perceive foreigners in different ways. This was observed during the work of Nussbaum and Salmi within the education system in India, but has said to have relevance in a lot of other countries as well (Nussbaum M. , Education and Democratic Citizenship: Capabilities and Quality Education, 2013).

Hutmacher (Hutmacher, 2002) and others state the need to measure the quality of education not on the base of testing but more in terms of broader outcomes of overall development that are deployed as people become an active part in society. Measuring this aspect of quality would be complex, and requires further development.

Many threats to equity are equally threats to quality of education, for example the lack of a safe and child friendly learning space affects children and their educational attainment in unequal ways. This can take the form of bullying or harassment during, or on the way to or from school, or in non sensitive behaviour and methodology deployed by teachers in the classroom or school environment. For example, children that are not able to perform average or above in completing tasks are more likely to develop a fear of going to school if the teacher utilizes corporal punishment to motivate children to perform. Another well documented side of this barrier is that a non safe learning environment affects girls in more severe ways than boys (Leach 2003, UNICEF 2003, Pinheiro 2006, et al.)

1. **Equity and quality of education in Nepal**

## Historical context

Nepal was a Hindu kingdom for centuries and inequalities in terms of people's capabilities was one of the foundations of the caste system. Nepal became a democracy in 1990, although this did not represent societal composition and remained to a largely non inclusive. The need for equal participation in society by marginalised Dalits (low caste), Janajatis (ethnic minorities) and women was largely ignored by political parties and policy makers (Bennet, 2006). As a result of the growing dissatisfaction among these people about not being properly included, the Maoist movement gained momentum and launched the 'people's war' in 2006, even though it has been (Bennet, 2006) noted that their agenda did not really promote freedom of expression and representation. After ending the ten year armed conflict between the Maoist rebels and the Government of Nepal, the country became a democratic republic in 2008. Since then, Nepal has been in a phase of socio economic, political, technological and cultural transition in many ways grappling with highly diverse realities in terms of geography, tradition, ethnicity, language, income distribution and human development. The first national political focus on inclusion was through the adoption of strategies to reduce social exclusion in Nepal's 10th 5 year plan.

## Diversity and exclusion

Nepal is a very diverse country. These diversities often contribute to different levels of social exclusion. One of the strongest barriers to an inclusive society has been the establishment and institutionalization of the caste system, as it is based on the understanding that people have different values. The codification of castes was first officially implemented through the National legal code (Muluki Ain) in 1853 and officially dismissed at the end of the Rana era in 1951.It was only officially in use for less than 100 years, however, the effect of its exclusive nature are still largely part of Nepal's everyday society (Thapa, 2003).The main ideological/religious foundation for the system is that people descend from different parts of the god Brahma, thereby obtaining different levels of being a human by default. Reincarnation can lead over time to progress from one caste to another between lives but social mobility (except in the case of marriage but also in that context only limited) across castes is otherwise impossible as it is one's fate to live the life one is born in ().

The caste system has gone beyond classification of people as it also defines their purpose in life based on the caste they are in. Thus creating occupational castes and constructing a society where everybody has a clear purpose, and there is a high disparity of access to resources, public life, and bodily integrity. For example the Kamaia were bounded labour castes and thereby property of who ever owned the land they lived and worked on. Dalits are not allowed to touch water or enter temples, as they would pollute them. The Badhi caste became a prostitute caste over time. Bista (Bista D. B., 1991)notes that the Nepalese caste system does differ from the Indian one in the sense that it attempts to include all groups within the society, creating a highly complex system of over 60 castes and sub castes, all having specific hierarchical linkages to each other (some castes are only considered untouchable by some other castes). Issues of being allowed to touch public water and being enslavable have been considered amongst the worst forms of capability deprivation by Bista(Bista D. B., 1991) and Vishwakarma(Devkota, 2002) This religious classification based on ethnic features resulted in an environment where the strongly profiled anti caste Maoist movement gained a lot of support. Indigenous people (Janjatis) who were degraded to low status groups by the ruling castes (Brahmins and Chetris), and have increasingly sought political participation and establishment of their identity after 1990 (Lawotti, 2005).From 2006, Nepal has undergone many transformations but often at a very different pace in different places. Urbanization and modernization for example have caused a more secular middle class in the capital city of Kathmandu, whereas there are still reports of people from Dalit communities getting abused for entering temples in rural parts of the country.

## Contemporary context

Even though the country has officially adopted equal opportunities in terms of access to public services, political participation and other quality of life outcomes, informal structures and institutions have remained in place establishing the opposite of this (Bennet, 2006). As such, quality of life evaluations show large disparities between different groups of people living in society. Overall, indicators show that the level of inequality across the whole society (GINI Coefficient) has gone down with more than 6% in the last 10 years, and poverty has been reduced by 36% over the last 20 years, although the dependency on remittances in direct linkage with this statistic is being explored[[19]](#footnote-20). Furthermore, there have been positive developments in terms of increased quality of life for the average population, and a 6.5% increase of the 60+ population from 2001. Also the fact that there has been an increase in the number of *castes* or ethnic groups and languages in the last ten years, which could indicate a larger freedom in terms of tolerance to diverse manifestations of identity. When considering gender equality over that same period of time there has been an increase in female led households and joint ownership of assets. However, the data also shows that still more than half of girls are married before the age of 18. This indicates multi level capability deprivations in terms of physical and mental integrity, (reproductive and sexual) health, education and sustainable livelihoods (VSO Nepal 2011, UNESCO et al.). Also, even though more than half of the total population is female (51%), there are more boys than girls living in Nepal aged between 0-10, with the highest difference in the rapidly growing urban areas. This is indicative of gender preference, and may be the result of female infanticide or sex selective abortion which have been exposed in India (Sen 1990). The literacy rate has also gone up significantly in the last 10 years but the gender gap in literacy remains, with57.4% of women literate versus75.1%of men. The female population has large disparities in literacy based on ethnicity, location and income.

The overall significant increase of basic educational attainment is also not coupled with a trend of the population gaining access to more extended education. The 2011 Census shows that only half of the children completing primary education complete secondary education and only half of those children (with disproportional equity ratios in terms of ethnicity, location, gender and socio economic status) manages to complete tertiary education. This has also been confirmed by the 2013 pass rate of the School Leaving Certificate exam that students take at the end of grade 10 (lower secondary).Less than half of the children passed the exam, and a substantial proportion of those passing came from private education[[20]](#footnote-21).

In terms of Livelihoods, trends data show a growth in access to electricity and owning mobile phones (currently two third of the population), yet simultaneously large parts of the population still do not have a toilet (38%),and 64% still cook on wood stoves which curtail their health capabilities. Again, these deprivations have proved to cause the largest negative impact for women and girls/children as they are for example the most vulnerable when having to relieve themselves in public spaces and are the ones that are in the same room as the open wood fires and smoke pollution. When looking at the current state of poverty in Nepal through an applied capability approach perspective, little over 44% of the population experiences poverty with an average intensity[[21]](#footnote-22) of almost 50% among these people and 47% of them experiencing severe poverty. In addition, almost 21% of the remaining population is currently considered vulnerable to poverty (OPHI 2011).

## Educational context

Although significant progress in the overall access of people to educational and health services has increased over recent years, this improvement is distributed in an non equitable way. The poorest have experienced the least improvements regarding quality of their life, access to, retention in and completion of education, and access to health facilities or economic opportunities. As such, the gap between these people and the rest of the society has widened (World Bank 2013). These pockets of capability deprived people reside in geographical pockets as opposed to being spread through society. The Terai is home to the most deprived groups and human development indicators show highest child mortality rates, lowest attendance in school, and highest rate of child marriage(World Bank 2013). Although the Nett Enrolment Rate currently is measured at 95% for primary education in Nepal, the attendance rate remains at 72% for that same level with a decrease to 42% after grade 5. This means that a large part (more than 40%) of the school going population either stops going to school or stops regular attendance in school after primary level. Of the children that do not continue regular education after grade 5, a disproportional number belong to the most deprived groups in society (World Bank 2013).

During a review of the national education program in 2012, a number of observations were made with regard to the state of education in Nepal(Cummings, 2012). In line with the international trends, Nepal has seen a significant increase in the number of children that has started to access school in the last decades. However, the recent linkage between different methods of data collection on out of school children show that although the average Nett Enrollment Rate has increased to around 95%, pockets of marginalized communities remain largely untouched by these improvements. For certain groups of marginalized children, like the minority Muslim communities, the data shows a decrease in enrollment. Additionally, there is still a substantial difference between the enrolment rates and the regular attendance rates, which are estimated to be 10-20% lower, indicating problems with the quality of education. In addition, Nepal also faces gaps in the transition from primary (95%) to lower secondary (70%) and currently has less than 50% of the (enrolled) students that appear in the grade 10 exam to obtain their School Leaving Certificate, indicating a low internal efficiency of the system.

With regards to gender, currently gender parity has been reached at the primary (grade 1-5) level. However it should be observed that children enrolled in the private sector are not counted, and it is expected that a larger proportion of boys get sent to private education (as the expected return for investment in them is higher), thereby creating an unbalanced representation in the public sector. Recognizing separate sanitation facilities for girls as one of the priority minimum enabling conditions has been an important way to ensure girls remain in school as this has been identified as one of the main factors affecting girls dropping out of school. However, there is a chronic under representation of female teachers in the education system, especially in the higher grades, enforcing a gender insensitive learning environment.

With regards to quality, the public school sector is lagging behind, with high dropout and average repetition rates in basic education (grade 1-8) of nearly 20%(Department of Education, 2013). However, there are initiatives to broaden the curriculum with the inclusion of non core curriculum skills, including life skills. A main area of concern is professional development of teachers and teacher management, as teachers and their professional organizations (unions) have become highly politicized and thereby are often beyond the control of the educational management at central and district level. The education sector has been slow to respond to issues relating to diversity, as the multilingual and mother tongue teaching and curriculum have been endorsed at central level but are lacking implementation at local level. Rigid teacher recruitment procedures cannot respond to the needs on the ground with regard to teachers that can educate children in local languages.

The Government has adopted 5 priority minimum enabling conditions in terms of learning environment on public basic education in schools. These conditions are separate toilets and sanitation facilities for girls, sufficient classrooms for the number of grades, teachers present in the classes, textbooks received on time and book corners with a specified number of books. Currently over 2000 of these schools are not meeting 3 out of these five conditions(Department of Education, 2013).

In terms of equity, access to education varies when it comes to location and ethnicity. Gender only starts showing significant disparities beyond basic level, which could be partially presenting a more optimistic picture due to the earlier mentioned preference to enrol boys into private institutions.

In terms of the governance of education, Nepal faces challenges as it is simultaneously decentralizing the educational sector yet local governance structures have not been enabled to function fully. Therefore, they often take on the function in a ceremonial way or lack the mandate to enforce their management at local level. Governance is also faced with a large gap in terms of institutional capacity. The education sector was expanded in volume and responsibilities from having no pre-primary education centres 21 years ago, to currently running 34174 across the country. The structure of the Ministry of Education, the Department of Education and the central level agencies remains largely unchanged. For example despite a huge increase in the number of educational institutions, there is still only 1 section within the Ministry devoted to higher education (Moriani, 2013).

Monitoring and evaluation education data is not reliable due to human resource constraints and conflicting terms of references at the local and district level, with school supervisors and resource persons having unrealistic large amounts of schools to cover. However, hopefully this will improve with validation processes now in place and a two year extension of the sector wide approach (SWAp)being developed with a stronger focus on integrated management information systems (Ministry of Education, 2013).

## Opportunities

The Ministry of Education in Nepal is currently involved in developing a two year extension of the sector wide approach (SWAp) arrangement under which the school sector reform programme is being implemented. This would extend the total implementation period of the programme to 2016. This will provide the education sector almost three years to prepare for the 2015 MDG deadline and broaden learning outcomes to provide learners the skills they need to establish a fair overall quality of life. At the moment, the Ministry and the Department of Education are strengthening their information management and linking data from the national living standard survey with the educational (FLASH) data base. This will enable them to obtain a more holistic picture of the educational and learning needs and outcomes of children. In the last year this has brought about new insights from data about out of school children, identifying their living conditions in terms of family size, profession and education of parents, socio economic status, gender and ethnicity desegregated by village units. In terms of quality and national early grade reading program is being launched, and an integrated comprehensive equity strategy is expected to be finalized by the end of 2013.

1. **Analysis & Discussion**

## Analysis

The capability approach has over the years increasingly developed as a potential evaluative framework for assessing people's quality of life and access to opportunities. Scholars like Sen, Nussbaum and Alkire have taken the theory from the more abstract concepts of justice, well being and happiness to the development practitioner's level to a practical level. They have shown that the approach has potential to be used for in depth qualitative research, as well as identifying larger scale quantifiable indicators for national and globally comparable research on people's overall well being and agency. A demonstration of this is in the adaption of the capability approach within the evaluative frameworks of the UN agencies and also in the way that people's life quality outcomes have been defined throughout the last two decades.

Education has been recognised as a means to establish these quality of life outcomes measures, and as one of the main means to do gain better quality of life. In making sure that education provides this platform for people to fulfil their capabilities it is important that the two core elements of equity and quality are taken into account in appropriate ways. The dimensions of equity and quality need to be understood and safeguarded when developing educational models and methodologies.

Although the international development community has broadened its focus from access to education, to quality and equity, countries are yet to follow this lead through institutional revisions of curriculum, teacher professional development, educational governance and management and strengthening the overall institutional capacity of the system to provide relevant and inclusive quality education through a decentralized model. For this to happen, radical revisions might be needed in terms of the focus of education systems and their measurement of educational learning outcomes as the capability approach focuses more on an overall development of social and life skills. Current core subjects are a part of these, rather than having topics like maths, science and language remaining as isolated pillars that can be tested separately. If education models were constructed as small scale reflections of the society and context of which they are part, focusing on the developments of skills such as empathy, self reflection and adaption, children could be enabled to become conscious and sensitive parts of the society. They will be able to see opportunities of developing their capacities in cohesion with the people and social structures surrounding them.

Nepal is in need of such restructuring, particularly due to the high diversity in many aspects of society. Diversity can be seen as strength, but history has unfortunately revealed that on occasions it can become a threat, usually when needs are increasing and resources are decreasing. As the country is in transition it is crucial that the focus is turned to utilising this diversity in a positive way and education is an appropriate vessel to achieve this. Changing the ways educational achievement is measured could be an opportunity for Nepal, particularly because the current assessment model shows unsatisfactory results without having the depth and ability to provide the diagnostic insights needed to improve. This feeds in to the fatalism that is still is a part of Nepali culture that prevents people from questioning and striving for a better life.

The broader economic picture of Nepal's economy should not be neglected. People currently complete education as it provides opportunities in terms of recognition and titles rather than the opportunity to utilize skills learned through this education.

An adequate assessment is needed to provide a capability enabling baseline, which will help Nepal know where to start in adapting the education system so that it responds to the needs and overall well being of people. Scholars such as Gronvik (2007) have stated the desire to combine the empirical approaches with social constructivist approaches in order to achieve a better understanding of issues, the capability approach used as an evaluative framework in the education system in Nepal might help to do this. Because Nepal is in the process of linking data, there are opportunities for participatory approaches, such as the Alkire-Foster method to be adapted and included. This would also provide the opportunity to provide a stronger context focused education, providing people with the quality life skills they will need in the in their living and working context. The provision of 20% of the curriculum being reserved for local curriculum development provides an entry for this concept.

With regards to equity, Nepal has a long way to go in terms of being able to provide fully inclusive education, especially for children with special needs. As Levin (2009) observed: "The barriers to equity are relatively easy to detect but highly complicated to resolve.[[22]](#footnote-23)"

## Discussion

One major feature of Nepal's demographics that is in need of further research through using the capability approach is the massive labour migration that is ongoing for the last decade. It is estimated that nearly 2 million of the total Nepalese population is working and living abroad. It is currently estimated that 1000 Nepalese people per day go abroad to work as unskilled labourers. Remittances are now estimated to be the largest contribution to the GDP in the last years, preventing a substantial number of households to from falling below the poverty line. But many are exploited and the money sent home is usually used on reoccurring expenses rather than investment in sustainable improvement or strengthening of the livelihoods. The census shows that 45% of migrant workers are between 15-24 years old, which raises a serious concern from the theoretical perspective of this paper, as many are living mostly in situations that resemble modern slavery conditions. The benefits of establishing a quality public school sector with a secondary stream integrating life skills may not serve those children who, would leave instead of remaining in school. If they were to stay in Nepal this could severely affect the income of many families, when Nepal is seeing sharp increases in the prices of basic commodities.

It is recommended to consider the capabilities approach when updating the agreed action plans and policy matrixes, to ensure adequate implementation of the School Sector Reform Programme in the coming 3 years. The development of the comprehensive equity strategy to strengthen the overall inclusiveness of the education sector and reach the children that remain out of school, or those who are at risk of dropping out or not obtaining learning outcomes would be an ideal starting point for demonstrating the potential of this approach at a national level. A second possible intervention where the approach would be suitable could be the revision of the Government's strategy on teacher professional development and management, as teachers have been identified as key to quality education. These two national strategies could be a viable next step to demonstrate the strength of taking a participatory capability approach as theoretical foundation for them. As such, the potential the people returning from labour abroad could be explored in setting up an alternative secondary vocational stream, as is envisioned in the School Sector Reform Programme extension document. In doing so, Nepal could get a second chance in supporting these people in the establishment of quality life outcomes when rejoining the Nepalese society as active agents of change.

1. **Conclusion**

The Cuban Poet Jose Marti (1953-95) said that education is like providing people with keys to the world. Considering education as means to unlock opportunities and capabilities seems ever more relevant, as the world is a rapidly changing reality with new locks. Examining education through the theoretical framework of the capabilities approach, one could say that education should provide people the skills to make keys that fit to the locks that are relevant for them. In doing so we need to ensure that the education is adjusted to the needs of the population so that they can maximise its utility, and contribute to the progression of society.

Politically, economically and socially, Nepal is at a point in time where it has options to become a model of strength through diversity or maintain a state of social exclusion and discrimination. Education is key to ensure that Nepal progresses towards inclusive sustainable development. But for this to happen, education needs to be radically revised in terms of its methodology, curriculum and institutional governance. Baseline assessment of the current situation and learning outcomes is crucial in this regard. Because the reality of Nepal is complex and diverse, a evaluative framework that allows people to be part of the design and identification of indicators is suitable. An approach is needed that can provide in depth qualitative data that acknowledges the multiple levels in which education and learners move, as well as compatible data for district, regional or national comparisons. Therefore the capability approach could provide a theoretical starting point for this to occur.

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