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## DO ANTI-DISCRIMINATION MEASURES REDUCE POVERTY AMONG MARGINALISED SOCIAL GROUPS?

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# Do Anti-Discrimination Measures Reduce Poverty Among Marginalised Social Groups?

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# Acknowledgements

# List of acronyms

| | |
|---|---|
| AIDS | Acquired Immune Deficiency Syndrome |
| BEE | Broad-based Black Economic Empowerment |
| CEDAW | Convention on the Elimination of All Forms of Discrimination Against Women |
| CEE | Commission for Employment Equity |
| CMS | Centre for Media Studies |
| DFID | Department for International Development |
| EEA | Employment Equality Act |
| EEP | Employment Equity Plan |
| EFA | Education for All |
| EIB | Intercultural Bilingual |
| HE | Higher Education |
| HEART | Health and Education Advice and Resource Team |
| HIV | Human Immunodeficiency Virus |
| HRW | Human Rights Watch |
| ICT | Information and Communication Technology |
| IDEA | Institute for Democracy and Electoral Assistance |
| ILO | International Labour Organization |
| JE | Juventud y Empleo |
| LGBTQ | Lesbian, Gay, Bisexual, Trans and Queer |
| LMICs | Low- and Middle-Income Countries |
| MDG | Millennium Development Goal |
| MGNREGS | Mahatma Gandhi National Rural Employment Guarantee Scheme |
| MP | Member of Parliament |
| MPI | Multidimensional Poverty Index |
| NGO | Non-governmental Organisation |

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|---|---|
| NSS | National Sample Survey |
| OBC | Other Backward Caste |
| OECD | Organisation for Economic Co-operation and Development |
| PICOS | Population, Intervention, Comparator and Outcomes and Study |
| PSNP | Productive Safety Net Programme |
| RCT | Randomised Control Trial |
| RPF | Rwandan Patriotic Front |
| SAT | Sistema de Aprendizaje Tutorial (Honduras) |
| SC | Scheduled Caste |
| SDG | Sustainable Development Goal |
| ST | Scheduled Tribe |
| STEM | Science, Technology, Engineering and Mathematics |
| STEPS | Supporting Talent, Entrepreneurial Potential and Success |
| TAC | Treatment and Action Campaign |
| UK | United Kingdom |
| UN | United Nations |
| UNDP | UN Development Programme |
| UNESCO | UN Educational, Scientific and Cultural Organization |
| UNICEF | UN Children's Fund |
| US | United States |
| WHO | World Health Organization |

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# Preface

Discrimination on grounds of gender, race, age, sexual orientation, disability, nationality or citizenship limits access to, among other things, the labour market and the educational system and affects political participation. It also undermines human rights and is one of the key reasons for keeping effected groups in poverty, according to the Chronic Poverty Report from 2014. Also, the UN has stated in the Agenda 2030 that "we need to tackle the inequality within and among countries in order to eradicate poverty". This includes eliminating discriminatory laws, policies and practices. Against this background EBA has initiated cooperation with the Chronic Poverty Advisory Network (CPAN), the research team behind the Chronic Poverty Report.

CPAN has previously identified large-scale anti-discrimination measures as a way to combat both inequalities between groups (horizontal inequalities) and economic inequalities (vertical inequalities). In this study the team at CPAN, under the lead of Director Andrew Shepherd investigates what works best and for whom. In 2015 they initiated the large project "Evaluating anti-discrimination measures" and EBA supported the project both financially and by being part of the Evaluating Partnership formed by the experts and the funders together. A global systematic review of the literature on this topic was made together with a cross-country quantitative analysis of inequality of outcomes and levels of discrimination in relation to the labour market, the educational system and political representation.

As one of several outputs from this large project, the present EBA report focuses on whether anti-discrimination policies and programmes are more effective for some social groups than others and if so, why. It also studies how far and in what ways anti-discrimination policies and programmes have contributed to reducing poverty among the poorest people.

From a Swedish perspective, evidence on effects on certain marginalized groups are of particular interest since Sweden has a relative long history of targeted support to women and girls, children and LBTQ persons in low-income countries. There are of course a range of measures implemented in different countries and contexts but some general conclusions can still be made. Regarding for example

gender discrimination the review finds that political reservations increase women's representation in parliaments and local governments, also politics seems to shift towards more local perspectives and issues. However, regarding labour market, reservations have often not had the desired outcome for women, and sometimes even had a reverse effect. This shows a complexity in the issues that donors like Sweden need to tackle when designing programmes and measures. A cash-transfer mechanism is clearly successful in terms of getting marginalized children to school, something also Glewwe et al. found in their review of education measures (EBA 2016:02).

This is the fourth systematic review of knowledge and evidence in a specific area that has been commissioned by EBA. We believe that systematic reviews will help us better understand the knowledge base and also identify evidence gaps which future EBA reports may help to fill. One such example from this review is the lack of studies of the relative impacts of cost-effectiveness of synergies between different anti-discrimination measures.

To conclude, the authors call for more aid to strengthen institutions responsible for combatting discrimination. Also they point to the importance of reviewing impacts regularly in order to, among other things, be aware of unexpected negative impacts. They believe the SDGs provide an opportunity for promoting more forceful and effective action on discrimination. Time will show but it is my hope that this report will benefit both Swedish development cooperation and researchers looking for new topics to investigate.

The work on this report has been conducted in dialogue with the international Evaluation Partnership chaired by CPAN in which Julia Schalk has been participating. The analysis and conclusions expressed in this report are solely those of the authors.


Stockholm, February 2017

Lars Heikensten

# Sammanfattning

## Studiens bakgrund samt översikt

Diskriminering på grund av kön, ålder, kasttillhörighet, funktionsnedsättning eller religion samt av vissa etniska grupper utgör en kränkning av de mänskliga rättigheterna i världen och en viktig faktor som bidrar till en hög fattigdomsnivå bland många av de diskriminerade grupperna. Den här rapporten skapar ny kunskap genom dess rigorösa granskning och sammanställning av belägg hämtade från låg- och medelinkomstländer som behandlar följande huvudfrågeställningar:

- Vad finns det för belägg för att storskaliga strategier och program mot diskriminering av olika samhällsgrupper fungerar effektivt?

- Fungerar strategier och program mot diskriminering bättre för vissa samhällsgrupper än andra? I så fall varför?

- I vilken utsträckning och på vilket sätt har strategier och program mot diskriminering bidragit till att minska fattigdomen bland de allra fattigaste?

Rapporten fokuserar på följande samhällsgrupper: kvinnor och flickor, barn, ungdomar, personer med funktionsnedsättning, marginaliserade etniska grupper och rasgrupper samt marginaliserade kaster. Vi fann mycket få belägg när det gäller insatser för att bekämpa diskriminering av flyktingar, migranter, äldre och hbtq-personer.

I rapporten identifieras fyra huvudstrategier för minskad diskriminering: lagändringar, förändrade attityder, kvotering och undantag samt program för sociala investeringar, inklusive både övergripande initiativ och program som riktar sig till vissa grupper. Rapporten granskar belägg för dessa ansatsers effekt utifrån storskaliga initiativ inom politik, utbildning och arbetsmarknad. Merparten av de belägg som hittades rörde kvoter och undantag (klassiska handlingsprogram för positiv särbehandling) och program för sociala investeringar. I de fall där belägg finns att tillgå behandlas

kontextuella faktorer (ofta politiska) som bidrar till eller undergräver dessa programs effektivitet.

## Metodik

Rapporten baseras på en grundlig analys av 470 studier. Den föregicks av en omfattande och systematisk sökprocess i utvecklingsdatabaser, med hjälp av Google och Google Scholar samt på organisationswebbplatser som både omfattade sökningar på nyckelord och riktade sökningar efter belägg för särskilda lagars, strategiers och programs effekter. Sökprocessen och studiens kriterier för inkludering inriktades på storskaliga program, vilket bl.a. innebar att många småskaliga initiativ inom det civila samhället inte inbegreps. Dokument som utifrån en sexgradig skala, som tagits fram för en annan grundlig granskning med blandad metodik, bedömdes vara både noggrant utformade och relevanta inbegreps i studien. Granskningen genomfördes under perioden augusti 2015–april 2016.

Mot bakgrund av Indiens långa historia av insatser mot diskriminering är det inte förvånande att en fjärdedel av de granskade studierna rör Indien. Det näst mest representerade landet är Sydafrika. Regionala evenskluster återfanns i Östafrika, Kina och Latinamerika. Vi fann mycket få belägg från Mellanöstern, Nordafrika och Sydostasien.

## Huvudresultat

I de flesta bedömningarna av insatserna mot diskriminering granskas insatsernas effekter när det gäller att minska den diskriminering som drabbar vissa grupper. I en mindre undergrupp av studier granskar man i vilken mån dessa insatser inneburit en förbättring i fråga om ekonomiskt välstånd, tillgång till utbildning och andra utvecklingsrelaterade effekter. En annan mindre undergrupp av studier fokuserar på i vilken utsträckning insatser har nått mindre bemedlade medlemmar i missgynnade grupper. Tabellen nedan ger en sammanfattning av evidensen för antidiskrimineringsinsatsers effekter på olika grupper. Den visar hur spridda insatserna för positiv särbehandling är och hur få grupper som gagnats av dem överlag. Den visar även att vissa grupper, t.ex. personer med funktionsnedsättning, har försummats på en rad områden.

## Sammanfattande tabell: Antidiskrimineringsinsatsers effekter på marginaliserade grupper

| Samhällsgrupper | Insatser | Beläggens omfattning samt effekter |
|---|---|---|
| Kvinnor | Politiska undantag och kvotering | Omfattande belägg från Indien (>10 studier) samt belägg från Latinamerika och Afrika. Framgång när det gäller att öka antalen, beläggen för genomgripande förändringar är mindre tydliga |
| | Insatser för positiv särbehandling inom högre utbildning | Begränsad beläggsförekomst i Östafrika (<10), Framgång när det gäller att öka antalen |
| | Insatser för positiv särbehandling på arbetsmarknaden | Mycket begränsade belägg |
| Flickor | Kontantöverföringar för att öka andelen inskrivna i skolan | Omfattande systematisk granskning av belägg (> 10 studier). Positiva effekter på andelen inskrivna i skolan, blandade belägg i fråga om inlärning |
| | Kampanjer för attityd- och beteendepåverkan | Få studier (<5), tydliga positiva effekter |
| | Ökad jämställdhetsmedvetenhet i skolan | Få studier (<5), positiv effekt på närvaro och inlärning |
| | Yrkesutbildning för tonårsflickor | Begränsat antal studier (<10), blandade effekter |
| Barn | Investeringar och kontantöverföringar i syfte att förbättra tillgången till det allmänna utbildningssystemet | Omfattande belägg (> 10 studier); positiva effekter |
| | Alternativ grundutbildning | Begränsat antal studier (<10); överlag positiva effekter |
| Ungdomar | Politiska undantag och kvotering för ungdomar | Mycket få belägg (1 studie) |
| | Yrkesutbildning för ungdomar med funktionsnedsättning | Begränsat antal studier (<10), blandade men överlag positiva effekter |
| | Insatser för positiv särbehandling inom högre utbildning | Begränsat antal studier (<10), ökning av antalet men blandade effekter på mindre |

| | | |
|---|---|---|
| | | bemedlade personer |
| Personer med funktionsnedsättning | Politiska undantag | Mycket få belägg (1 studie) |
| | Inkluderande utbildningsinsatser inom skolan | Begränsat antal studier (<10); blandade effekter |
| | Insatser för positiv särbehandling inom högre utbildning | Få studier (<5), positiva effekter |
| | Kvotering på arbetsmarknaden | Mycket få belägg (2 studier), begränsade effekter |
| | Kampanjer för attitydpåverkan (arbetsgivare och samhället i stort) | Inga belägg |
| Marginaliserade rasgrupper och etniska grupper | Politiska undantag | Få studier (<5), blandade effekter |
| | Ökad finansiering och finansiellt stöd till skolor och elever från marginaliserade grupper/områden | Få studier (<5), överlag positiva effekter trots utmaningar |
| | Tvåspråkig undervisning/modersmålsundervisning i grundskolan | Begränsat antal studier (<10); positiva effekter i merparten av fallen |
| | Tvåspråkig undervisning/modersmålsundervisning i gymnasieskolan | Inga belägg |
| | Undantag inom högre utbildning | Begränsat antal studier (<5), överlag positiva effekter |
| | Undantag och omfördelning av resurser (stöd) på arbetsmarknaden | Begränsade belägg (<5 studier), blandade effekter |
| Marginaliserade kaster (Indien) | Politiska undantag | Effektiva när det handlar om att ökade antal, vissa belägg för effekter när det gäller inkomstfattigdom och samhällsutveckling |
| | Investeringar i utbildningssystem, ytterligare medel för amrginaliserade kaster | Ökad andel inskrivna i skolan, den huvudsakliga orsaken till skolavhopp är fortfarande diskriminering |
| | Kampanjer för attitydpåverkan (skola och samhälle) | Inga belägg |
| | Undantag inom högre utbildning | Positiva effekter på det inkluderade antalet samt på inkomst efter avslutade studier |
| | Undantag på arbetsmarknaden | Positiva effekter på inkomster men liten inverkan på den yrkesmässiga rörligheten, har inte bidragit till att göra det lättare att fly fattigdom |

| | Allmänna undantag | Undantagen är utbredda, berör en betydande del av befolkningen och har resulterat i betydande motreaktioner |
|---|---|---|
| Andra marginaliserade grupper | Kampanjer för attitydpåverkan (HIV och spetälska) | Få belägg, viss framgång |
| | Politiska undantag | Inga belägg |
| | Program för stärkt integration i skolan | Inga belägg |
| | Program för ökat deltagande på arbetsmarknaden | Inga belägg |

## Fattigdomseffekter

I studien används en flerdimensionell definition av fattigdom som inbegriper utbildnings- och hälsoresultat, dåliga sanitära förhållanden och bostäder, bristande tillgång till information, upplevd maktlöshet och avsaknad av rättigheter samt ekonomiskt välstånd. I praktiken fokuserar granskningen på belägg som rör ekonomiska aspekter av fattigdom, utbildning, hälsa samt kvalitet i arbetet. Trots att ansträngningar fortlöpande har gjorts för att finna belägg för allmänna fattigdomsrelaterade aspekter har vi funnit få noggranna konsekvensstudier som behandlar antidiskrimineringsinsatsers effekt på hur människor upplever fattigdom, informationstillgång eller utanförskap. Det betyder inte att sådana effekter saknas utan att dessa inte har studerats i den granskade litteraturen.

Det finns belägg för att insatser för positiv särbehandling inom den högre utbildningen och på arbetsmarknaden har lett till positiva ekonomiska effekter för ett stort antal av målgrupperna. Malaysias handlingsprogram för positiv särbehandling erkänns ha bidragit till den **betydande minskningen av inkomstfattigdomen** bland majoriteten av den malaysiska befolkningen som skett sedan 1990-talet. I Indien förknippas politiska, utbildnings- och arbetsmarknadsrelaterade undantag för registrerade kaster och stammar med en övergripande minskning av inkomstfattigdomen i dessa grupper. **De flesta som gagnas av undantag som rör arbetstillfällen inom offentlig sektor hamnar dock inte långt över fattigdomsgränsen** och löper risk att åter drabbas av fattigdom om undantagen avskaffas. Det kan konstateras att dessa insatser för positiv särbehandling har åtföljts av bredare investeringar i skolutbildning, vilket har ökat andel personer i de marginaliserade

grupperna som är berättigade till positiv särbehandling när det gäller högre utbildning och sysselsättning.

Det finns vissa belägg för att man i Indien associerar politiska undantag för kvinnor med **ökade investeringar i byars infrastruktur, t.ex. vatten och sanitära anläggningar**. Det finns även vissa belägg för ett samband mellan ökat politiskt deltagande för kvinnor genom kvotering till byråd och **förbättrad nutrition bland barn** i dessa områden. Belägg från Östafrika tyder på att kvinnliga politiker (både de som omfattats av undantag och de som tillsatts i öppna anställningsförfaranden) har infört lagstiftning om rättighetsrelaterade frågor, t.ex. våld i hemmet och barnäktenskap. Vissa analytiker hävdar vidare att det är mer sannolikt att kvinnor som kvoterats in, eller som har kommit in i politiken genom partikvotering, slussas in på områden, såsom sociala investeringar, på grundval av könsrollsmönster.

Överlag visade sig insatspaket med utbildningsinriktning ha positiva effekter på **marginaliserade gruppers grad av inskrivning och utveckling i skolan** och det finns vissa belägg för att arbetsmarknadspolitiska undantagsåtgärder har skapat incitament för familjer att låta sina barn genomgå längre utbildning. Det finns inte lika mycket som tyder på att politiska undantag påverkar tillgången till eller deltagandet i utbildning, även om en studie från Indien visar att kvinnliga politiska företrädare utgör viktiga förebilder för flickor och har bidragit till ökade investeringar i utbildning för flickor.

I ett fåtal av de granskade studierna genomfördes en fördjupad granskning av attitydspåverkan som ett sätt att minska den sociala diskrimineringen. En viktig effekt som utbildning, särskilt gymnasial utbildning, har är att den bidrar till mindre diskriminerande könsrelaterade attityder. Det vore värdefullt att i framtida studier undersöka huruvida utbildning spelar en liknande roll när det gäller andra former av diskriminering.


## Effekter för de fattigaste i marginaliserade grupper

Följande slutsatser har dragits i studier som uttryckligen behandlar effekter för de fattigaste personerna i marginaliserade grupper:

*Skolutbildningsprogram som riktar sig till marginaliserade grupper har överlag nått fattiga personer i dessa grupper*, även om de inte

nödvändigtvis har nått fram till de allra fattigaste eller till personer som drabbas av flera former av diskriminering (t.ex. flickor med funktionshinder i isolerade landsbygdsområden).

*Beläggen är blandade när det gäller undantagens fördelningsmässiga effekter inom den högre utbildningen.* Studier i Indien, och en studie i Brasilien, tyder på att undantagen har nått fram till mindre bemedlade medlemmar i marginaliserade kaster och stammar respektive rasgrupper (afrobrasilianska grupper). Andra studier pekar dock ut bristen på finansiellt stöd till fattiga studenter som en avgörande faktor som begränsar effekterna av undantagen inom den högre utbildningen för mindre bemedlade personer i marginaliserade grupper.

Vissa belägg från Sydafrika pekar på att insatser för ekonomisk egenmakt bland färgade personer (fördelning av tillgångar och sysselsättningsrelaterade undantag) har bidragit till att en svart elit har bildats men inte gjort mycket för att förbättra de minst bemedlade svarta sydafrikanernas ställning.

Där nationella politiska undantag för kvinnor förekommer, t.ex. i vissa östafrikanska länder, förefaller de främst utnyttjas av mer välsituerade kvinnor. På lokal nivå är detta inte lika tydligt, framförallt när det rör sig om fall där undantagen nyttjas av kvinnor från marginaliserade kaster (i Indien) eller kvinnor i fattiga landsbygdsområden (i olika länder).

## Utmaningar och oavsedda effekter

I arbetet med att främja de marginaliserade samhällsgruppernas intressen syftar handlingsplaner för positiv särbehandling till att omfördela samhällets resurser och utmana accepterade sociala mönster. De har i det hänseendet en politisk laddning, vilket kan innebära att:

*Insatser för positiv särbehandling kan skapa nya dimensioner i fråga om integration och utanförskap*, eftersom handlingsplaner för positiv särbehandling fungerar som resursportaler. Det finns till exempel belägg från Indien och Nepal som visar på att benämningar som ”ursprungs-” eller ”stam-” ifrågasätts för att de ska ha utformats för att både kunna ge ekonomiska medel och möjliggöra politisk representation som inte annars skulle ha funnits.

Det finns betydande motreaktioner mot antidiskrimineringspolitiken, i synnerhet i fall där fördelarna för andra grupper uppfattas som stora eller oförtjänta. Detta framgår allra tydligast när det gäller undantag för kaster i Indien och könskvotering till universitet i Östafrika. Motreaktioner kan även förstärkas om politiken bedöms stödjas av givare eller andra externa intressen såsom i fallet med strategier för att få slut på diskrimineringen av gravida skolflickor i Zambia.

I fall där strategier utformas med endast en form av identitetsbaserad diskriminering i åtanke (t.ex. politiska undantag för kvinnor) kan dessa skapa en falsk bild av gemensamma intressen inom en grupp. Andra identitetsaspekter kan till exempel ha större politisk betydelse än könstillhörighet, och bl.a. få kvinnor att hellre rösta utifrån dessa intressen än utifrån könsrelaterade intressen. De kan även resultera i att enskilda personer som är marginaliserade i andra hänseenden drivs bort. Kastbaserade undantag inom den högre utbildningen i Indien har till exempel haft den snedvridna effekten att tvinga bort kvinnliga studenter som utgör en annan underrepresenterad grupp, särskilt inom naturvetenskapliga och tekniska ämnen.

## Rekommendationer:

**1. Främja förverkligandet av rättigheter och inkluderande tjänster för alla (t.ex. tillgång till utbildning samt arbetstagarrättigheter) som ett första led mot förändring.** En sådan inramning innebär möjlighet att bidra till mer delaktighet och undvika motreaktioner. Den ligger även i linje med åtagandena kring de globala hållbara utvecklingsmålen om att "alla ska med". Detta kräver investeringar i allmän tillgång till tjänster och insatser för att komma till rätta med diskriminering, t.ex. kampanjer för attitydpåverkan bland tjänsteleverantörer, arbetsgivare och allmänheten, som gör diskriminering olaglig och enskilda ansvariga för diskriminerande behandling.

**2. För grupper som utsätts för särskilt allvarlig diskriminering eller kumulerade och fattigdomsrelaterade hinder på utbildnings- eller sysselsättningsområdet behövs fortfarande riktat ekonomiskt och socialt stöd samt undantag.** Praktiskt stöd kan omfatta initiativ såsom uppsamlingskurser, utbildningar eller särskilda insatser för att

göra olika miljöer mer tillgängliga för personer med rörelsesvårigheter. För att motverka motreaktioner kan dessa insatser uttryckligen behöva inriktas på marginaliserade låginkomstgrupper som uppfyller urvalskriterierna samt på mer allmän utbildning för att skapa stöd för insatserna.

**3. Stärka de institutioner som ansvarar för att bekämpa diskriminering och som erbjuder diskrimineringsprövning.** Till exempel ökad tillgänglighet till rättsväsendet så att marginaliserade grupper på ett mer effektivt sätt kan använda sig av det rättsliga skyddet. Säkerställa genomförandet av antidiskrimineringsstrategier samt därmed förenad ansvarsskyldighet för offentliga tjänstemän, personal med direkt kundkontakt i sitt arbete (t.ex. lärare och hälso- och sjukvårdspersonal) samt personer i ledande ställning inom den privata sektorn (exempelvis arbetsgivare, privata skolors ledningsteam och lärare).

**4. Strategier och program mot diskriminering är mest effektiva i stödjande ekonomiska och politiska sammanhang, tillsammans med tillbörlig finansiering och parallella kampanjer för attitydpåverkan.** Sponsorers och regeringars insatser för att minska diskrimineringen bör syfta till att främja sådana breda stödsammanhang.

**5. Ökad representation för marginaliserade grupper på kort sikt kommer sannolikt att ställa krav på riktade undantag.** Över tid, i takt med att allt fler från dessa grupper genomgår utbildning, får ökad kännedom om representativa institutioner och större självförtroende, kan sannolikheten för att de ska kandidera till offentliga uppdrag öka. Där diskrimineringen är djupt rotad (t.ex. vad gäller diskriminering av kvinnliga ledare eller företrädare med funktionsnedsättning) kommer fortsatta undantag sannolikt att krävas på medellång sikt. Det är viktigt att komma ihåg att företrädare för marginaliserade grupper – oavsett om de valts inom ramen för öppna ansökningsförfaranden eller undantag – ofta är mer lojala mot politiska partier och mentorer än mot sina identitetsgrupper och/eller kan utsättas för avsevärda påtryckningar från organiserade intressen och rösta därefter.

**6. Godkänna kampanjer för attityd- och beteendepåverkan i kombination med insatser för positiv särbehandling.** Rådande diskriminerande attityder och bruk kan urholka effekten av insatser som lagstiftning, undantag och ekonomiskt stöd. Kampanjer av detta slag måste både vända sig till allmänheten och till personer med ansvar för att genomföra strategier och program mot diskriminering. För

denna grupp kommer skräddarsydd utbildning sannolikt att behövas. Detta är viktigt för att komma till rätta med den djupt rotade diskrimineringen inom offentliga och privata institutioner. Exempel inbegriper utbildning för vårdpersonal för att främja lika behandling av alla grupper samt förberedande utbildning och fortbildning för lärare om hur man i praktiken kan erbjuda lika utbildningsmöjligheter, t.ex. undervisning med genderperspektiv, tvåspråkig undervisning eller stöd till elever med funktionsnedsättning.

7. **Regelbunden konsekvensöversyn.** Medvetenhet om att utformningen av stöd till vissa samhällsgrupper kan få oväntade negativa följder såsom upplevd "särbehandling", vilket bl.a. kan ge upphov till ilska och missunnsamhet och ökad diskriminering. Genom regelbunden översyn kan man säkerställa att åtgärder vidtas i tid för att minimera denna animositet och att programmen kommer ekonomiskt missgynnade medlemmar i socialt marginaliserade grupper till godo, istället för att utnyttjas av grupper inom eliten. En regelbunden översyn kan även bidra till att identifiera områden där framstegen är tillräckliga och insatser för positiv särbehandling inte längre är nödvändiga eller behöver utvecklas för att inriktas på de mest missgynnade personerna inom utvalda grupper.

8. **Givare måste vara medvetna om att de verkar inom ett mycket politiskt område** och måste vara noga med att följa de regeringar eller organisationer i det civila samhället som verkar för att komma till rätta med diskrimineringen och att främja marginaliserade gruppers rättigheter. Detta kan vara en svår uppgift på grund av olika gruppers konkurrerande intressen och det faktum att de mest marginaliserade grupperna inte alltid företräds i det civila samhället eller av organiserade aktörer på nationell nivå.

9. **De globala målen för hållbar utveckling innebär en möjlighet att främja mer kraftfulla och effektiva insatser mot diskriminering.** Tack vare de hållbara utvecklingsmålens tydliga betoning på fattigdomsbekämpning och jämställdhetsfrämjande finns det nu ett unikt tillfälle att skapa bredare engagemang kring bekämpningen av diskrimineringen och särskilt säkerställa att sådana insatser når de mest marginaliserade.

# Centrala evidensbrister

*Allmänna frågor*

Det föreligger inte någon tydlig analys av den **relativa effekten, kostnadseffektiviteten eller betydelsen av synergier mellan olika strategier** (t.ex. rättsliga reformer, kvoter, breda sociala investeringar, riktade investeringar och program för attitydpåverkan). Inte heller har **vikten av sektorsövergripande investeringar** (t.ex. parallellt både på utbildnings- och arbetsmarknadsområdet) analyserats i stor utsträckning, trots att erfarenheter i Indien och Malaysia visar på betydande synergieffekter. En bättre förståelse av dessa frågor skulle utgöra ett stöd vid utformningen av ändamålsenliga program.

En annan tydlig evidensbrist rör det civila samhällets främjande och ansvarsutkrävande roll vad gäller regeringars genomförande av antidiskrimineringsinsatser. Litteraturen fokuserar på nationella regeringars strategier och program, medan det civila samhällets betydelse för utformningen och genomförandet av dessa initiativ är mindre väl känd. Dessutom skulle en bättre förståelse av vissa av det civila samhällets antidiskrimineringsinsatsers effekter och innovativa natur, samt potential när det gäller att förstärka den offentliga sektorns insatser, utgöra ett mer effektivt stöd i utformningen och genomförandet av politiken.

Det krävs ytterligare analyser av de fördelningsmässiga effekterna av handlingsplaner för positiv särbehandling, i synnerhet vad gäller effekterna på fattiga grupper. Därtill behövs kreativt tänkande kring hur dessa handlingsplaner kan användas för att på ett mer effektivt sätt nå ut till de fattigaste personerna i marginaliserade grupper.

Vi fann mycket få belägg när det gäller initiativ för att bekämpa diskriminering bland tjänsteaktörer med direkt kundkontakt i sitt arbete, t.ex. vårdpersonal och för att främja en kultur med tjänster för alla. Det behövs ytterligare belägg för väl fungerande metoder. Vid behov kan erfarenheter från småskaliga exempel fungera som vägledning för större insatser. Lärdomar kan dras av de svenska erfarenheterna av stöd till utbildning i arbete mot diskriminering.

## Särskilda samhällsgrupper

Det fins ett stort evidensgap som rör **antidiskrimineringspolitikens effekter på personer med funktionsnedsättning**, särskilt när det gäller sysselsättning, högre utbildning och politisk representation.

Det finns förvånansvärt få analyser av de effekter som **insatser för positiv särbehandling har för kvinnor på arbetsmarknaden**. De analyser som finns fokuserar snarare på program, som t.ex. yrkesutbildningsprogram för unga kvinnor, än på effekterna av lagstiftning där diskriminering straffbeläggs eller av kvotering på arbetsmarknaden.

Det är även tydligt att det saknas analyser av **initiativ för att komma till rätta med de ojämlikheter och diskriminerande metoder som drabbar män och pojkar**, t.ex. stereotyper där unga män anges vara benägna att hemfalla åt brottslighet med våldsinslag. Detta påverkar deras utsikter på arbetsmarknaden och trygghet överlag i vissa sammanhang.

# Summary

## Background and Overview of the Study

Discrimination – on grounds of gender, against particular ethnic groups, on grounds of age, caste, disability or religion is a violation of human rights worldwide and an important factor contributing to the high rates of poverty among many discriminated-against groups. This report breaks new ground by synthesising evidence from a rigorous review of evidence from low and middle income countries that explores the following key questions:

- What evidence is there concerning the effectiveness of large-scale anti-discrimination policies and programmes for different social groups?

- Are anti-discrimination policies and programmes more effective for some social groups than others? If so, why?

- How far and in what ways have anti-discrimination policies and programmes contributed to reducing poverty among the poorest people?

The report focuses on the following social groups: women and girls, children, young people, disabled people, marginalised ethnic and racial groups and marginalised castes. We found very limited evidence on measures to combat discrimination against refugees, migrants, older people or LGBTQ people.

It identifies four key strategies for reducing discrimination: legal change; attitude change; quotas and reservations; and social investment programmes, both broad-based initiatives and programmes targeted at particular groups, and explores evidence of the impact of these approaches through large-scale initiatives in the political arena, education, and labour markets. In practice, the bulk of evidence found concerned quotas and reservations ('classic' affirmative action programmes) and social investment programmes. Where such evidence is available, it discusses the contextual (often political) factors that contribute to, or undermine, the effectiveness of these programmes.

## Methodology

The report is based on a rigorous review of 470 documents. It followed a comprehensive and systematic search process in development databases, google and google scholar and on organisational websites, involving both keyword searches and targeted searches for evidence on the impact of specific laws, policies and programmes. The search process and inclusion criteria for the study focused on programmes implemented at scale, meaning that many small-scale civil society initiatives were excluded. Documents judged to be both rigorous, using a six point scale developed for another mixed methods rigorous review, and relevant, were included in the study. The review took place over the period August 2015-April 2016.

Given India's long history of anti-discrimination measures, it is unsurprising that a quarter of the documents examined relate to India. The next best represented country is South Africa, with regional concentrations of evidence from East Africa, China and Latin America. We found very little evidence from the Middle East, North Africa or South East Asia.

## Key Findings

The majority of assessments of anti-discrimination interventions examine their impact on reducing the discrimination faced by particular groups. A small sub-set of studies examine how far these measures have resulted in improved economic wellbeing, enhanced access to education, and other developmental impacts. Another small sub-set of studies focuses on how far interventions have reached poor members of disadvantaged groups. The table below summarises the evidence of impacts of anti-discrimination interventions on different groups. This shows how patchy affirmative action measures are and how few groups have benefited across the board. It also shows the neglect of some groups, such as disabled people, across a range of domains.

**Summary Table: Impacts of Anti-discrimination interventions on Marginalised Groups**

| Social Group | Interventions | Extent of Evidence and Impacts |
|---|---|---|
| Women | Political reservations and quotas | Extensive evidence from India (>10 studies); also evidence from Latin America and Africa. Successful in increasing numbers; evidence of transformative change less clear |
| | Affirmative action in higher education | Moderate amount of evidence from East Africa (<10); Effective at increasing numbers |
| | Affirmative action in labour markets | Very limited evidence |
| Girls | Cash transfers to increase school enrolment | Extensive systematic review evidence (> 10 studis). Positive impacts on enrolment; mixed evidence on learning |
| | Attitude and behaviour change campaigns | Few studies (<5); Clear positive impacts |
| | Increase schools' gender-sensitivity | Few studies (<5); positive impacts on attendance and learning |
| | Vocational training for adolescent girls | Moderate number of studies (<10); mixed impacts |
| Children | Investments and cash transfers to increase access to mainstream schooling | Extensive evidence (> 10 studies); positive effects |
| | Alternative basic education | Moderate number of studies (<10); overall positive effects |
| Young People | Youth political reservations and quotas | Very little evidence (1 study) |
| | Vocational training for disadvantaged youth | Moderate number of studies (<10); mixed but broadly positive impacts |
| | Affirmative action in higher education | Moderate number of studies (<10); increase in numbers but mixed evidence on poor |
| Disabled People | Political reservations Inclusive education policies in schools | Very little evidence (1 study) Moderate number of studies (<10); mixed impacts |
| | Affirmative action in higher education | Few studies (<5); positive impacts |
| | Labour market quotas | Very little evidence (2 studies); limited impacts |

| | | |
|---|---|---|
| | Attitude change campaigns (employers and wider society) | No evidence |
| Marginalised Racial and Ethnic Groups | Political reservations | Few studies (<5); mixed impacts |
| | Increased funding and financial assistance for schools and students from marginalised groups/ areas | Few studies (<5); broadly positive impacts despite challenges |
| | Bilingual/ mother language teaching in primary schools | Moderate number of studies (<10); positive impact in most cases |
| | Bilingual/ mother language teaching in secondary schools | No evidence |
| | Reservations in higher education | Moderate number of studies (<5); broadly positive impacts |
| | Labour market reservations & asset redistribution (shares) | Limited evidence (<5 studies); mixed impacts |
| Marginalised Castes (India) | Political reservations | Effective in increasing numbers: some evidence of impacts on income poverty and community development |
| | Investments in education system; additional funding for marginalised castes | Increase in enrolment; discriminatory practices still major cause of drop out |
| | Attitude change campaigns (schools and society) | No evidence |
| | Reservations in higher education | Positive impact on numbers represented and post-graduation income |
| | Labour market reservations | Positive impact on incomes but little impact on occupational mobility; have not facilitated escape from poverty |
| | General | Reservations are widespread, affect significant numbers of the population and have led to considerable backlash |
| Other Marginalised Groups | Attitude change campaigns (HIV and leprosy) | Small amount of evidence; some success |
| | Political reservations | No evidence |
| | Programmes to boost educational inclusion | No evidence |

| | Programmes to boost labour market inclusion | No evidence |
| --- | --- | --- |

## Impacts on poverty

The study uses a multi-dimensional definition of poverty, which includes educational and health outcomes, poor sanitation and housing lack of access to information, and experience of powerlessness and deprivation of rights, as well as economic wellbeing. In practice, the review concentrates on evidence on economic aspects of poverty, education, health and quality of work. Despite sustained efforts to search for evidence on wider aspects of poverty, we found few rigorous impact studies that discuss the impact of anti-discrimination measures on people's experience of poverty, access to information or sense of exclusion. This is not to say that there are no such impacts, but that these have not been explored in the literature reviewed.

There is evidence that affirmative action measures in higher education and labour markets have benefited significant numbers of the groups targeted economically: Malaysia's affirmative action policies are credited with contributing to the *significant reduction in income poverty* among the Malay majority observed since the 1990s. In India, political, educational and labour market reservations for scheduled castes and tribes are associated with an overall reduction of income poverty in these groups. However, *most beneficiaries of public sector jobs reservations, in particular, are not raised far above the poverty line* and are vulnerable to falling back into poverty if reservations are removed. It is notable that these affirmative action measures have been accompanied by broader investments in school-level education that have increased the proportion of marginalised groups eligible to benefit from affirmative action in employment and higher education.

There is some evidence from India that political reservations for women are associated with *increased investment in village infrastructure, such as water and sanitation*, and also some evidence of a link between greater political participation of women through reserved seats on village councils and *improved nutrition of children* in those areas. Evidence from East Africa indicates that women

politicians (both beneficiaries of reservations and those elected in open competition) have introduced legislation around rights issues such as domestic violence and child marriage. Some analysts further suggest that women in reserved seats or who have entered politics through party quotas are more likely to be channelled into areas seen as consistent with gender roles, such as social investment.

Overall the package of education-focused measures had positive impacts on *marginalised groups' enrolment and progression through school*, and there is some evidence that labour market reservations programmes have created incentives for families to educate their children for longer. There is less evidence of the impact of political reservations on access to or uptake of education, though one study from India finds that women political representatives are important role models for girls and have spurred greater investment in girls' education.

Few of the studies examined in this review focused in depth on attitude change as a route to reducing social discrimination. One notable impact of education, particularly secondary education is the promotion of less discriminatory attitudes to gender; it would be helpful for future studies to explore whether education plays a similarly strategic role in relation to other forms of discrimination.

## Impacts on poor members of marginalised groups

Studies that explicitly examine the impacts on poor members of marginalised groups have come to the following conclusions:

*School level programmes to target marginalised groups have generally reached poor members of those groups*, though not necessarily the poorest, or people affected by multiple forms of discrimination (e.g. disabled girls in isolated rural areas).

*There is mixed evidence concerning the distributional impacts of reservations in higher education*, with studies from India and one from Brazil indicating that these have reached poorer members of marginalised castes and tribes, and racial groups (Afro-Brazilians) respectively. However, elsewhere, studies point to the lack of financial support for poor students as a key factor which limits the impact of higher education reservations on poorer members of marginalised groups.

There is some evidence from South African that Black Economic Empowerment Measures (distribution of assets and employment reservations) have contributed to the development of a Black elite, but has done little to improve the position of poorer Black South Africans.

National political reservations for women, where they exist, as in some East African countries, appear primarily to be occupied by better-off women. At local level, this is less clearly the case, particularly where reservations are occupied by women from marginalised castes (in India) or in poor rural areas (various countries).

## Challenges and Unintended Consequences

In seeking to advance the interests of marginalised social groups, affirmative action policies aim to redistribute resources in society and represent a challenge to accepted patterns of social interaction. As such, they are politically charged. This can mean that:

*Affirmative action can create new dimensions of inclusion and exclusion*, since affirmative action policies act as gateways to resources. For example, there is evidence from India and Nepal that labels such as 'indigenous' and 'tribal' are contested as being designated as such can enable both financial resources and political representation that would not otherwise be available.

There is considerable backlash against anti-discrimination policies, particularly where the perceived benefits to other groups are perceived to be large or anti-meritocratic. This is most clearly visible in relation to caste reservations in India, and gender-based university quotas in East Africa. Backlash can also be enhanced if policies are seen as being supported by donors or other external interests, as with policies to end discrimination against pregnant schoolgirls in Zambia.

Where policies are designed with only one form of identity-based discrimination in mind (such as political reservations for women), they may create a false impression of shared interests within a group. For example, other aspects of identity may be more politically significant than gender, leading women representatives to vote according to those interests rather than gender-based interests. They may also lead to displacement of individuals who are marginalised in other ways. For example, caste-based reservations in higher education

in India have had the perverse effect of displacing women students, another under-represented group, particularly in scientific and technical fields of study.

## Recommendations:

**1. Promote the realization of rights and inclusive services for all (e.g. access to education, workers' rights) as a primary route to change.** Framing of this kind has the potential to be more inclusive and to avoid generating backlash, and is consistent with SDG commitments to 'leave no one behind'. This will require investment in universal access to services and action to eradicate discrimination, such as attitude change campaigns targeted at service providers, employers and the general public, making discrimination illegal and individuals accountable for discriminatory actions.

**2. For groups facing particularly severe discrimination, or who face cumulative poverty-related barriers to education or employment, targeted financial and practical support and reservations continue to be necessary.** Practical support may include initiatives such as catch-up educational or training courses, or specific measures to make environments more accessible to people with mobility difficulties. Targeting these measures explicitly at low-income marginalized group members who meet eligibility criteria, and more public education to build support for these measures, may be necessary to help combat backlash.

**3. Strengthen the institutions responsible for combatting discrimination and providing redress against it.** For example, increase the accessibility of the justice system so that marginalized groups can use legal protections more effectively. Likewise ensure commitment to implementing anti-discrimination policies and accountability for doing so among public officials and front-line service staff (e.g. teachers, health workers) and those responsible in the private sector (such as employers, private school management and teachers).

**4. Anti-discrimination policies and programmes are most effective in supportive economic and political contexts, with adequate resourcing and with simultaneous campaigns to change attitudes.** Donor and government action to reduce discrimination should try to facilitate this supportive broader context.

**5. Increasing representation of marginalized groups in the short term is likely to require targeted reservations.** Over time, as greater numbers of these groups progress through education and have greater familiarity with representative institutions and greater self-confidence, they may be more likely to put themselves forward for public office. Where discrimination is entrenched (for example against women leaders or disabled representatives), continued reservations are likely to be necessary into the medium term. It is important to bear in mind that representatives of marginalised groups – whether elected through open competition or reservations – often owe greater loyalty to political parties and mentors than to their identity group(s) and/ or may come under considerable pressure from organized interests, and vote accordingly.

**6. Enact attitude and behaviour change campaigns alongside affirmative action measures.** Ongoing discriminatory attitudes and practices can undermine the effectiveness of measures such as legislation, reservations, and financial support. Such campaigns need to target both the general public and people whose responsibility it is to implement anti-discrimination policies and programmes – for this group additional tailored training is likely to be necessary. This is vital for addressing embedded discrimination in public and private sector institutions. Examples include training for health workers to promote equal treatment of all groups and pre- and in-service training for teachers on practical ways to provide equal learning opportunities, such as gender-responsive teaching, bilingual education or supporting students with disabilities.

**7. Review impacts regularly.** Be aware that designating support for particular social groups can lead to unexpected negative impacts, such as perceived 'special treatment' causing resentment and sharpening discrimination. Regular review can ensure that timely steps are taken to minimise such resentment, to ensure that programmes are benefiting economically disadvantaged members of socially excluded groups, rather than being captured by elites. Regular review can also help identify where progress is sufficient that affirmative action measures are no longer necessary or need to be refined to focus on the most disadvantaged members of designated groups.

**8. Donors must be aware that they are intervening in a highly political arena** and must be careful to follow the leads of governments or civil society organisations committed to ending discrimination and advancing marginalized groups' rights. This may be a difficult path to

tread as different groups have competing interests and given that the most marginalized groups are not always represented by civil society or by organized constituencies in government.

**9. The SDGs provide an opportunity for promoting more forceful and effective action on discrimination.** Given the strong emphasis in the SDGs on combating poverty and promoting equality, there is currently a window of opportunity to galvanise more widespread commitment to reducing discrimination, and in particular to ensure that any such measures reach the most marginalized.

## Key Evidence Gaps

*Broader issues*

There is no clear analysis of the **relative impacts of, cost-effectiveness of, or the importance of synergies between different strategies** (eg legal reform, quotas, broad social investments, targeted investments, attitude change programmes). Nor is there much analysis of the **importance of investments across sectors** (eg in both education and labour markets simultaneously), though it is clear from experience in India and Malaysia that there are notable synergies. A better understanding of these issues would underpin effective programme design.

The role of **civil society in advocating for, and holding governments to account for the implementation of anti-discrimination policies** is another clear evidence gap. The literature concentrates on policies and programmes emanating from central governments but the role of civil society in shaping these initiatives and their implementation is less well understood. Furthermore, greater understanding of the contributions and innovative nature of some civil society society anti-discrimination action and its potential for enhancing government action would underpin more effective policy design and implementation.

Further analysis of the **distributional impacts of affirmative action policies – and in particular, their impacts on poor groups –** is needed. This should be accompanied by creative thinking about how these policies could more effectively reach the poorest members of marginalised groups.

We found very little evidence concerning **initiatives to combat discrimination among front-line service providers, such as health workers** and to promote a culture of equal services for all. More evidence of effective practice is needed, if necessary drawing on small scale examples that can guide scaled-efforts. Lessons could be drawn from Sweden's experience in supporting training in anti-discriminatory practice.

## Specific social groups

There is a major evidence gap concerning **impacts of anti-discrimination policies on disabled people**, partiuclarly in relation to labour markets, higher education and political representation.

There is surprisingly little analysis of the impact of **affirmative action measures in labour markets on women**: existing analysis concentrates on programmes such vocational training for young women, rather than examining the effects of laws outlawing discrimination or labour market quotas.

There is also a clear absence of any analysis of **initiatives to redress inequalities and discriminatory practices that affect boys or men**, such as stereotypes of young men as prone to violent criminality, which affects their job prospects and overall security in some contexts.

# 1. Introduction

Discrimination on grounds of identity – race, gender, caste, age, sexual orientation, nationality or citizenship affects, and undermines the rights and wellbeing of people worldwide. The list of groups affected by discrimination is long and varies from context to context, but includes specific ethnic, racial, religious and caste groups, women and girls, refugees, migrants and people without citizenship rights, people with disabilities or stigmatised health conditions, youth and older people and sexual minorities. This discrimination intersects with and is compounded by class-based prejudices and discrimination against poor members of society by all social groups and is a major factor keeping sections of affected groups in poverty (Arauco et al, 2014).[1] Thus, for example, poverty rates among marginalised castes in India are considerably higher than for high castes, and in Latin America, indigenous people constitute 17% of extremely poor people despite only forming 8% of the population (ibid).

Discrimination contributes to the persistence of poverty in a complex web of ways. Internalised discriminatory attitudes can lead to public policies that underinvest in services and creating economic opportunities in certain regions (often those with high concentrations of ethnic minorities or indigenous people). This is often compounded by limited political representation of these groups, which itself reflects marginalised groups' often poorer educational opportunities and sometimes discrimination within political parties which prioritise candidates they perceive as most electable, often those from dominant groups.

Discriminatory attitudes and demeaning treatment by public officials, service providers, employers and other members of society can limit marginalised groups' access to key services (such as health care and education). They can prove so off-putting that children of marginalised groups drop out of school (Sayed et al, 2007) or that pregnant women do not make use of antenatal and delivery services

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[1] Examples include well-documented discrimination in labour markets against people – particularly young men – from poor areas that are perceived as hotbeds of criminality (Das, 2013; Wilson, 1987) and against domestic workers – usually poor women or girls, often from marginalised ethnic, caste or religious communities – who often face abusive and exploitative working conditions (Blofield, 2009).

services (Turan et al, 2007), increasing the likelihood of maternal or child mortality and morbidity. Discrimination, both direct and indirect, limits marginalised groups' work opportunities. Direct discrimination limits marginalised groups' access to decent work. Indirect discrimination, related to unequal educational opportunities limits' marginalised groups opportunities to acquire basic, vocational and transferable skills through education that enable people to thrive in both formal and informal labour markets. Discrimination can also limit the access of entrepreneurs from marginalised groups to capital – their businesses are often seen as a poorer credit risk than those of people from dominant groups (Demirguc-Kunt et al, 2013). It can, additionally, result in discriminated-against groups sticking to livelihoods that keep them poor but lead to less exposure to discrimination (World Bank, 2013c). Discriminatory norms and practices can also limit young people's aspirations in a similar manner.

The everyday experience of discrimination can undermine affected groups' mental health and can undermine their safety and security, particularly in contexts where discriminatory attitudes are expressed as violent hate crimes. This limited security can also undermine access to services and economic wellbeing, as marginalised groups curtail their mobility to avoid verbal or physical violence (Moser and Von Bronkhorst, 1999).

Thus anti-discrimination policies and programmes have been identified as ways to combat both inequalities between groups (horizontal ineqaulities) and economic inequalities (vertical inequalities) redress some of the effects of discrimination, and in so doing, help people escape from poverty. Globally, anti-discrimination measures have a long but patchy history. In some countries, colonial policies aimed to promote the education, political cooperation and well-being of particular social groups that were perceived to be disadvantaged (Lee, 2012; Shah and Shneiderman, 2013) or that colonial governments saw as strategically useful to cultivate. These typically involved preferential access to education, civil service or military employment, and in some cases discrete programmes targeting particular groups, such as women, girls or groups perceived to be 'backward', such as some ethnic or livelihood groups (e.g. pastoralists and hunter-gatherers).

Some post-colonial nation-building programmes and programmes of (usually) left-leaning governments with a mandate to redress historical and existing group-based injustices have prioritised reducing

discrimination (Walsh, 2015). The demands of social movements, donor pressure and the desire of governments to appear progressive (Htun and Weldon, 2012; Mwansa, 2011; Walsh, 2015) have been factors in governments acceding to international conventions, making constitutional changes, passing laws and announcing policies designed to prevent discrimination and promote the well-being of disadvantaged groups. Policies and programmes variously include:

- increasing accessibility to and the quality of services primarily used by discriminated-against groups

- targeted measures such as quotas and reservations, or group-specific services to increase marginalised groups' access to education, employment or political representation

- curriculum and pedagogical changes, or financial support to make education more accessible, attractive and relevant to marginalised groups and

- sensitisation and training in anti-discriminatory attitudes and practices

Implementation of these policies and programmes has been variable, reflecting both the degree of commitment within a polity and civil society to the well-being of and social justice for particular groups and context-specific political factors, which have sometimes undermined progressive intentions (Walsh, 2015).

Other than gender inequalities, which had an explicit focus in the Millennium Development Goals (MDGs), issues of social exclusion and group-based discrimination have historically received very little attention in international development policy (Grimes et al., 2015). By contrast, and reflecting both civil society activism and growing policy concern with inequality, the Sustainable Development Goals (SDGs) contain a much stronger emphasis on reducing inequality and discrimination.

For example, SDG 10, on reducing inequality, has the following targets: '10.2 By 2030, empower and promote the social, economic and political inclusion of all, irrespective of age, sex, disability, race, ethnicity, origin, religion or economic or other status' and '10.3 Ensure equal opportunity and reduce inequalities of outcome, including by eliminating discriminatory laws, policies and practices and promoting appropriate legislation, policies and action in this regard'.

Among the relevant education targets is '4.5 By 2030, eliminate gender disparities in education and ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, indigenous peoples and children in vulnerable situations'. Target 8.5, on decent work and economic growth, states, 'By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value'.[2]

Although it remains to be seen how far the SDGs will inspire policy change, these explicit commitments to end discrimination may mean there is an opportunity for further-reaching and more concerted efforts to tackle ingrained attitudes and practices, and to resource programmes that can redress embedded inequalities. Indeed, it is widely recognised that to achieve the SDGs, including Goal 1 of ending poverty, much greater attention to the processes that lead to marginalisation, such as discrimination, will be needed (Bhatkal et al, 2015; Melamed, 2015).

Despite the growing and varied body of legislation, policy and practice to combat discrimination, limited analysis exists of the effectiveness of these measures, reasons for their success or failure and their impact on poverty and inequality among different marginalised social groups. This report outlines the findings of a rigorous review of 470 studies with insights into the effectiveness of anti-discrimination policies and large-scale programmes in low- and middle-income countries (LMICs). The focus on LMICs is not intended to imply that discrimination is a problem only of low or middle income countries, or that it is related to poverty only in these contexts – that is not the case as is clear from the rise of xenophobic and racist movements in Europe and ongoing police violence against African-Americans. There is much that different parts of the world can learn from each other on effective ways to combat discrimination. This study's focus on LMICs reflects its funders' specific interest in these countries and a need to keep the scope of the review manageable. It breaks new ground by being the first rigorous review of the effectiveness of anti-discrimination measures in LMICs and their impact on poverty.

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[2] https://sustainabledevelopment.un.org/index.php?menu=1300, accessed 8 January 2016.

This report focuses on the following key questions:

- What evidence is there concerning the effectiveness of anti-discrimination polices and programmes for different social groups?

- Are anti-discrimination policies and programmes more effective for some social groups than others? If so, why?

- How far and in what ways have anti-discrimination policies and programmes contributed to reduction of deprivation among the poorest people?

The report explores the issues through a focus on three domains: political representation, educational opportunities and achievement, and labour market experience. [3] The absence of certain groups or categories of person from political spaces is considered both a cause and an effect of structural exclusion and discrimination. Therefore, there is a strong case that in addressing discrimination, increasing political voice and inclusion for excluded groups is essential and inclusive institutions will be necessary (Carter, 2014).

## 1.1. Conceptual Framework

The study makes use of a multi-dimensional conception of poverty, which includes economic aspects such as income and assets, capabilities such as health and education, and control over one's life, such as power or powerlessness.[4] It set out to examine evidence concerning how far anti-discrimination measures have impacted on any of these areas, or proxies for them. In practice most of the evidence concerns impact on educational enrolment, attendance or achievement (particularly with education focused measures), a small amount of evidence on community development and health outcomes (associated with measures to promote political representation) and

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[3] Although it was initially intended to explore the impact of anti-discrimination policies in the social protection and health sectors we found very little evidence of anti-discrimination policies or programmes in the health sector. and on social protection we had found limited anti-discrimination outcomes and a large literature around the impact on women and children, which is well rehearsed elsewhere (e.g. Baird et al., 2013; Kabeer et al., 2012; Saavedra and Garcia, 2012). Therefore the review was refocused on political representation, education and labour markets.

[4] http://www.ophi.org.uk/research/multidimensional-poverty/, accessed 13/09/2016.

some evidence concerning employment, wages and incomes, particularly associated with labour market measures, but also related, in some studies to affirmative action in education and political representation.

The overall theory of change for this review draws on both theory and expected relationships, and the evidence we found, and is summarised in Figure 1. Any theory of change necessarily simplifies a complex set of change processes to bring a focus onto the main mechanisms by means of which anti-discrimination laws, policies and programmes may help reduce different dimensions of marginalisation, inequality and poverty. The feedback arrows in the diagram indicate the feedback between successful implementation, reduced discrimination and reduced social inequality, and between lack of implementation or resistance to policies and increased discrimination which may exacerbate poverty.

Figure 1 highlights the role of political comitment and civil society mobilisation in generating action to combat discrimination in four key ways covered in this review: legal change, attitude change campaigns, reservations and quotas and targeted services and financial support. Legal change typically provides the mandate for policies and programmes and enables legal challenges to discriminatory practices. Though these are uncommon they can set a precedent that has strong ripple effects. Attitude change campaigns seek to target beliefs that are often deeply held and underpin discriminatory practices – they may target officials (often through training initiatives) or the general public, and aim both to reduce discrimination in everyday interaction, to change views concerning the capabilities and rights of marginalised groups and to eliminate attitude-based barriers to these groups' use of key public services, access to labour markets and political representation. Quotas and reservations and targeted programmes typically aim to increase marginalised groups' representation in different social spheres: with increased political representation marginalised groups have greater potential to advance their interests; with greater access to education, they have greater opportunities to build capabilities for socially and economically rewarding lives; labour market reservations – like other reservations – are intended as a form of redress against past and current processes of discrimination and inequality. Targeted financial and other support (such as job training programmes) aims primarily to spport marginalised groups to build capabilities.

Figure 1 highlights the importance of a supportive political, social and institutional context and some of the challenges that typically undermine effectiveness. Our analysis suggests that high-level political support, engaged civil society with sufficient political space to organise and to engage with government, adequate resourcing of policies and programmes and a supportive institutional environment for implementation (such as officials having incentives to implement rather than obstruct policies) all play an important role in underpinning effective action and that the absence of any of these can reduce policies' effectiveness. Indeed, in many countries the advocacy role of civil society organisation is increasingly circumscribed by legislation that limits its space for activities deemd to be 'political', such as advancing the interests of discriminated-against groups.[5] In such contexts, civil society programme activities are also strongly directed by government, leaving them little space to innovate to serve the poorest or discriminated-against groups.

There are many examples of governments passing anti-discrimination legislation but where implementation is very weak as there is insufficient institutional capacity to enforce or monitor it. Figure 1 also puts the spotlight on some of the challenges that undermine effectiveness, such as elite capture, and backlash against policies perceived as giving some groups 'unfair' advantages. In some cases this resistance can actually exacerbate, rather than reduce, discrimination against marginalised groups.

The bottom half of Figure 1 highlights some of the expected impacts of effective anti-discrimination actions: less discriminatory social attitudes, reduced experiences of discrimination and greater opportunities for marginalised groups to access services, decent work and increased political representation of these groups. These in turn are expected to contribute to more inclusive societies and economies and reduced social inequalities.

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5        https://oxfamblogs.org/fp2p/5-trends-that-explain-why-civil-society-space-is-under-assault-around-the-world/, accessed 13/9/2016.

Figure 1 Theory of change
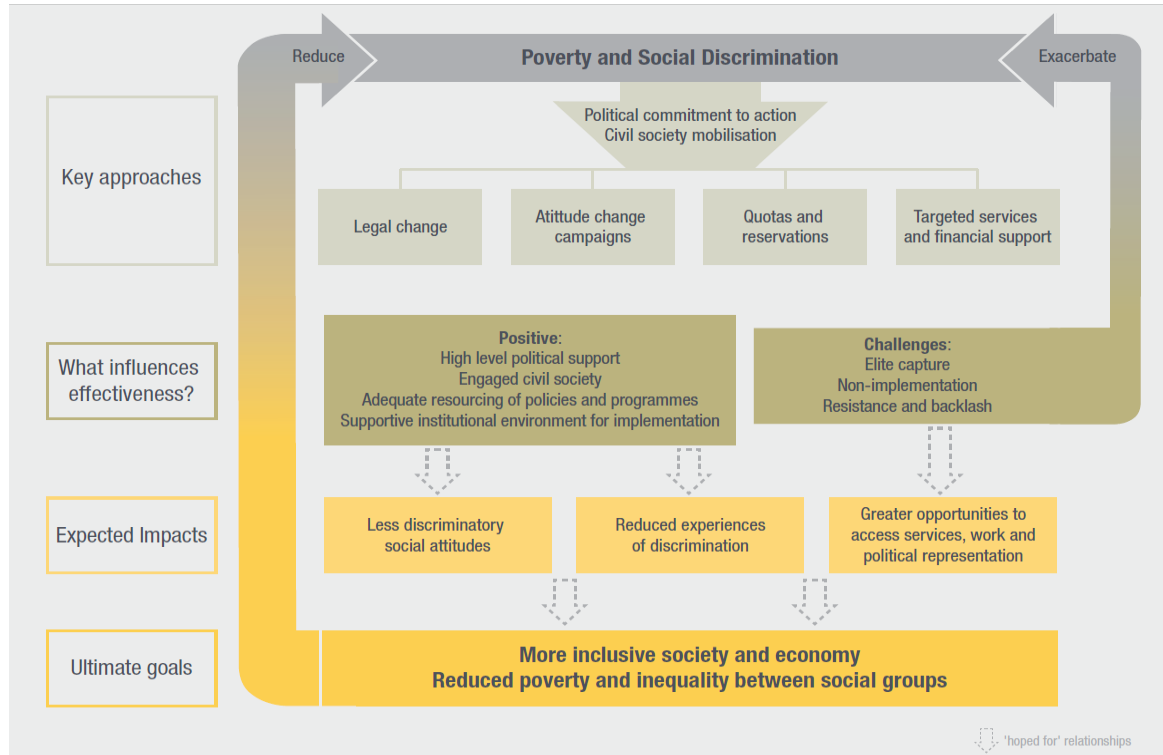
## 1.2 Structure of Report

The report is organised as follows. Section 2 outlines the methodology and presents an overview of the studies examined in this review. Further details can be found in Annex 1. Sections 3-9 discuss the impact of affirmative action measures on different social groups. In each section (unless there is no relevant evidence) we discuss the impacts of political reservations, measures to boost educational opportunities and outcomes, and measures to enhance labour market outcomes. Section 10 brings together the evidence from across the different social groups and discusses some cross-cutting issues, before making some recommendations about future policy and research in this area.

Because many marginalised people face discrimination on multiple areas of identity and affirmative action measures, particularly in education, often affect several marginalised social groups simultaneously, some evidence is relevant in multiple sections. To avoid repetition, we have discussed evidence in the most relevant part of the report and cross-referenced as necessary. This means that the section on children is shorter than most because the evidence refers almost entirely to education, and most of it to specific groups.

# 2. Methodology and Overview of Studies

## 2.1 Overview of Methodology

This study used systematic search principles to conduct a comprehensive search and locate studies of large-scale anti-discrimination programmes and policies, with a particular focus on their impacts on political representation, education and labour markets. This search took place over a 3-month period and involved the use of development-oriented databases, targeted google and google scholar searching, searches for evidence of the impact of specific laws, policies and programmes identified through an initial reading of the literature and gap-filling searches intended to identify literature on issues and social groups for which little information had been found. The search process also drew on recommendations from members of an expert advisory group formed to support this programme of research. Full details of the search process can be found in Annex 1.

We assessed the evidence found for relevance and methodological rigour, leading to a total of 470 studies. Within these 470 studies we report the findings of the most relevant and insightful studies on each topic, particulary in areas where we found a large number of studies. We drew additionally on contextual and policy literature that illuminated impact studies. Studies were managed in EPPI-Reviewer, a systematic review database that facilitates coding of key insights and analysis across themes and social groups.

## Biases and limitations

There are several potential points of bias in the review search and inclusion process. One such issue was the large amount of hand-searching of institutional websites, which required adaptations of the search terms and techniques and relied on website navigation structures – and so may not have returned all available studies (Hagen-Zanker and Mallett, 2013). We attempted to overcome the limitations of organisational websites by using Google to search within them.

Our keyword searches focused on types of anti-discrimination policy and excluded groups, and used terms designed to locate empirical

research. This strategy may have resulted in the return of limited political economy analysis and legal studies. It may also account in part for the high number of studies we located that outlined a law or policy and then presented a situational analysis of the disadvantaged group rather than considering the processes of change and implementation.

The focus on specific sectors may also have limited our access to analysis of the impacts of broader anti-discrimination policies, or to initiatives promoting non-discriminatory practice (for example, training of health workers or government officials in non-discriminatory practice). The emphasis on large-scale programmes – while necessary to make the study manageable – resulted in the exclusion of some evidence from civil society initiatives.

Much of the research we located was not ideally suited to a systematic or rigorous review, and we found very few discrete evaluations of programmes. We are also aware of potential publication bias, favouring the publication of studies and evaluations that show positive impact. Although we sought to include materials in French and Spanish, our search process only returned one relevant Spanish-language document. This may have resulted in a bias towards Anglophone studies and countries.

Researcher bias may have emerged during the search and screening process, as we relied on a single researcher to make initial decisions about inclusion. This may also mean we missed some studies. The literature search was challenging, as the terminology used in studies varied widely across our thematic areas, as did the initial availability of evidence. Particularly under the labour markets theme, it was difficult at the outset to locate empirical research and we had to rely heavily on snowballing techniques to find relevant evidence.

## 2.2 Overview of studies found

The section gives a brief overview of the distribution of the studies discussed in this review. More detail can be found in Annex 2.

### 2.2.1 Regional Distribution

The studies we located concentrated on Africa and South and South-East Asia. We found very little from the Middle East and North Africa and

from Europe and Central Asia. In the East Asia and Pacific region, all but one of the studies located were on China. Among the studies on Latin America and the Caribbean, the highest number came from Brazil. Fifteen ccountries are represented in this region, only one of them a Caribbean state (three studies on the Dominican Republic). Within this, South Africa and India are by some distance the countries with the largest number of studies, with India discussed in a quarter of studies and South Africa in just over 10% of studies (Figure 2).

## Figure 2: Regional distribution of studies
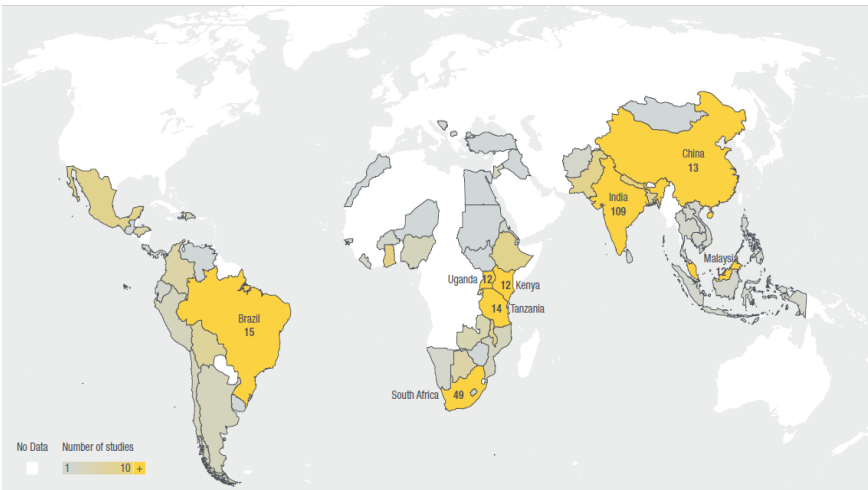


Numbers of studies are shown for countries with 10 or more studies.

## 2.2.2 Distribution by social group

The largest groups represented in the included studies were children and young people and women. A large body of literature dealt with policies to combat discrimination on grounds of race or ethnicity, particularly in the political sphere and labour markets. We found little literature that considered the impact of anti-discrimination policies or programmes on migrant groups, displaced or refugee groups, religious minority groups or indigenous peoples. Almost none related to discrimination on the grounds of sexuality (Figure 3).

**Figure 3: Distribution of studies by social group experiencing discrimination**
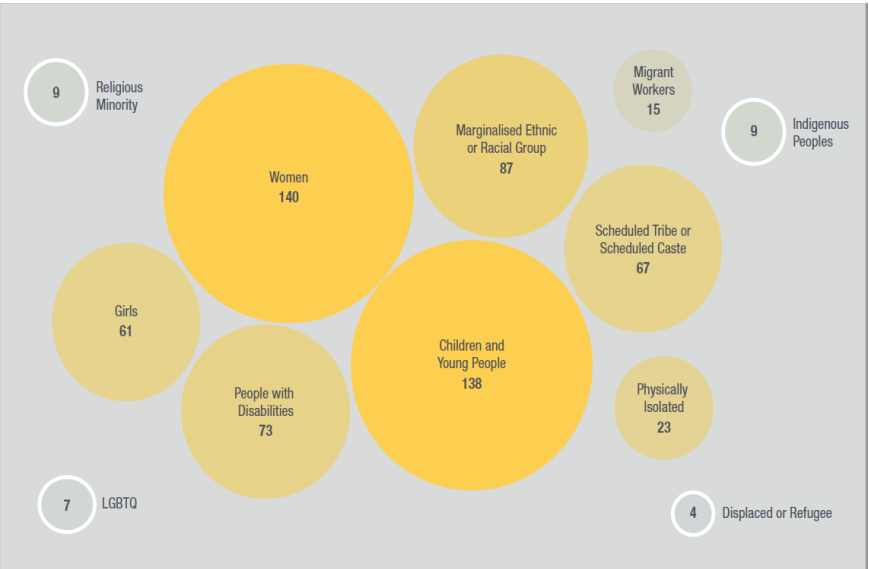


Note: many studies discussed more than one social group

Analysing the distribution of literature by theme and marginalised groups, we find some striking patterns (Figure 4). For example, almost all the literature on children related to education though a few studies commented on spillover effects of affirmative action on children's wellbeing, even whether they were not specifically the target. The vast majority of studies related to reducing discrimination against people with disabilities focused on education, with a secondary focus on labour market experience, with very little on political representation. By contrast, the literature on women's experience of affirmative action concentrated on political representation and to a lesser extent, higher education, with very little on gender-based affirmative action in labour markets.

## Figure 4: Distribution of Thematic Insights by Social Group
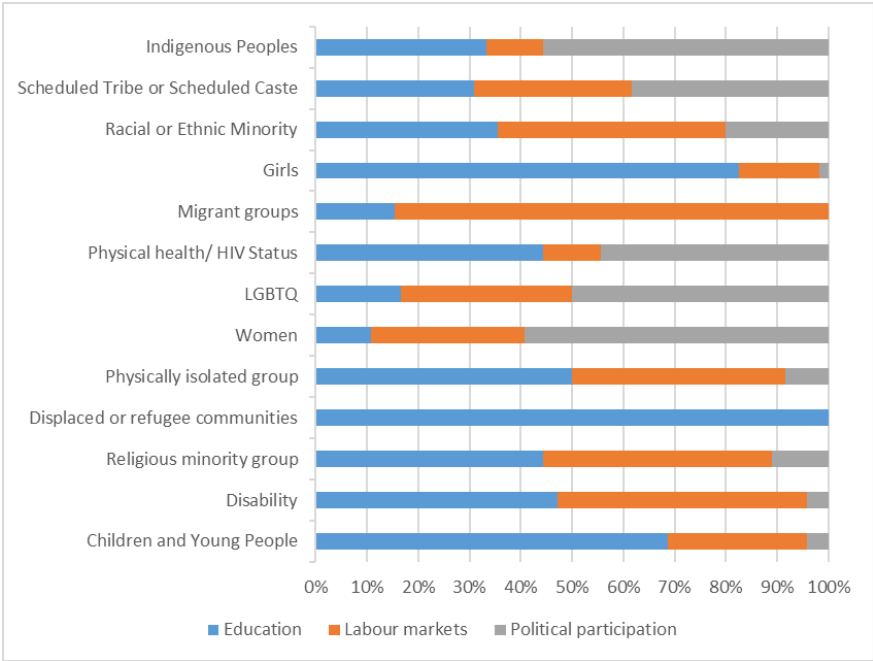


We present the evidence found concerning the effectiveness of anti-discrimination policies and programmes for the following marginalised social groups: women and girls, young people, marginalised ethnic and racial groups, people with disabilities, marginalised castes and neglected social groups.

# 3. Gender discrimination

**Key Findings**

*Political Representation*

Evidence from India, Sub-Saharan and North Africa shows that political reservations have been very successful in increasing the numbers of women in parliaments and local government, and have contributed to more positive views of women's leadership, though there is less evidence of this in Latin America.

The greatest number of studies focuses on the impact of local government reservations in India. These have found associations between women's greater representation and more local investment in services and water infrastructure, and less tolerance of alcohol-related violence. Some analysis from other regions (particularly East and Southern Africa) bears these findings out.

The qualitative literature from India and parts of Africa questions how far women leaders are able to act with autonomy, highlighting the pressures on them to toe party lines and, in some cases, to represent the interests of locally powerful groups, and agendas dominated by men.

Literature from both Africa and Asia suggests that reserved seats and party quotas are at risk of capture by elite women, and that reservations can, paradoxically, create additional burdens for poor rural women on top of their existing heavy workloads.

*Education*

There is good evidence that financial support (conditional and unconditional cash transfers, scholarships) have been effective in increasing girls' school enrolment and attendance. There is limited evidence concerning the effectiveness of large-scale communication campaigns to encourage parents to send their daughters to school; such evidence as exists suggests that these have an important role to play in shifting discriminatory norms concerning girls' education.

There is currently considerable emphasis on developing 'girl-friendly' schools with improved sanitation and facilities for menstrual management, ending school-related gender-based violence and creating gender-sensitive classrooms and overall school environments. Most

initiatives are relatively small scale but evaluations suggest they play an important role in enhancing girls' attendance and learning.

Despite growing evidence of boys' educational disadvantage in some regions and social groups, we found no evidence of evaluated initiatives to boost boys' attendance and learning.

Studies from East Africa where gender-based reservations in higher education are common suggest that they have been effective in increasing the numbers of women entering higher education, but do little for poorer women unless combined with financial support. Where affirmative action means women require lower grades to enter university, catch-up pre-entry programmes are important in enabling them to study effectively.

*Labour markets*

There is imited evidence of the impact of labour market reservations for women. Experience from South Africa suggests that gains for women have been small and largely affected access to top management jobs.

We also found very little evidence of effective legislation to outlaw discrimination against pregnant workers or specific groups of women, such as migrant workers, though protective legislation for both groups exists.

There is a significant body of evidence concerning training programmes for young women and adolescent girls. The Jovenes programmes in Latin America have increased employability more for young women than young men, though they have benefited both and reduced gender wage gaps for participants. Adolescent girl focused programmes have been most successful when they have included training in 'soft skills' as well as vocational skills and often reach more marginalised groups when training is supported financially and there is provision for childcare.

Despite our efforts to include literature concerning approaches to addressing gender discrimination that could affect people of any or no gender, in practice all the literature we found on policies and programmes to address gender discrimination focused on women and girls. This may reflect our focus in this study on well-established large-scale policies and programmes, given that specific areas of gender discrimination and inequalities affecting men and boys have only recently been recognised and are only starting to influence policy discourses and programming. Likewise, we found no evidence concerning policies and programmes to combat discrimination against transgender or non-binary individuals. We

return to these issues in the discussion of the limited evidence we found on people with non-heteronormative sexualities.

## 3.1 Women's political representation

The largest single body of literature found in this review concerned policies and initiatives to promote women's political representation. In this, and subsequent sections on political representation of marginalised groups, we draw on Pitkin's (1967) typology of four types of representation. Most of the literature in this area focuses on the final three.

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**Box 1: Four types of representation** (Pitkin, 1967)

- **authorised representation –** the authority and accountability mechanisms through which representatives act
- **descriptive representation** – the extent to which those elected resemble those who elect them
- **symbolic representation** – the meaning the representative has for those being represented
- **substantive representation** – the extent to which the representative can or is willing to advance the interests of those represented

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There is strong evidence in the literature that quotas can increase the numbers of women in political and legislative bodies (descriptive representation). Figure 5 shows increases in the numbers of women in parliament in most regions between 2003 and 2013. These coincide with an increased and widespread use of quotas.

**Figure 5: Number of women in parliaments, 2003 and 2013 regional averages**



| Region | Average % of women in single or lower houses, 2003 | Average % of women in single or lower houses, 2013 |
|---|---|---|
| Pacific | 12,1 | 13,1 |
| Arab states | 6 | 17,8 |
| Asia | 15 | 19,1 |
| Sub-Saharan Africa | 14,9 | 21,1 |
| Europe excluding Nordic countries | 15,5 | 22,8 |
| Europe including Nordic countries | 17,6 | 24,5 |
| Americas | 18,4 | 24,8 |
| Nordic countries | 39,7 | 42 |
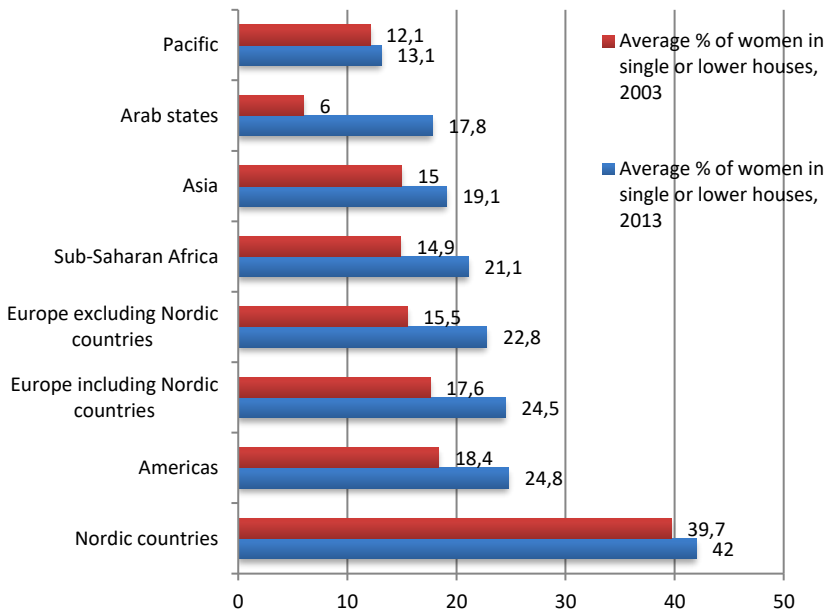
Source: Adapted from Inter-Parliamentary Union, in Dahlerup et al. (2013).

Quotas and reservations take a diversity of forms, depending on what is politically feasible in each context. Dahlerup et al (2013), in an 'atlas' of quotas, describe the situation in 85 countries and divide quota mechanisms into three broad categories:

1. political party quotas for women as aspirants to contest for political office – **voluntary party quotas in single member voting systems**

2. political party candidate quotas for inclusion on candidate lists – **nationally legislated quotas in proportional representation and majority/plurality systems**

3. **reserved seats** legislated in national constitutions or electoral laws and enforced by national institutions

Earlier evidence confirms that some systems work better than others in terms of increasing the descriptive representation of women. Evidence

from both South America and Sub-Saharan Africa suggests women are more likely to be elected in proportional representation systems with closed party lists than in majoritarian ones[6] (Baldez, 2004; Ballington and Matland, 2004).

Tripp and Kang (2008)'s study of patterns of women's participation in different countries and suggests several conclusions. First, that increasing the numbers of women in national legislatures is not dependent on democracy, and can be adopted for purposes that are not connected to projects to expand political and civil rights. Second, that there is some connection between numbers of women in national legislatures and levels of economic development at a global scale, but the presence of quotas matters far more than this – and reservations for women are the best way to increase numbers of women quickly.

Dahlerup and Freidenvall (2010) assess the nature of the evidence on quotas and suggest the debate has been too long stuck in whether to have quotas or not, when what is required is more longitudinal assessment of what happens when quotas are implemented. They argue that some empirical research is too simplistic to capture the complexity of what happens when quotas are used. Krook (2013) supports the need for a second generation of research that goes beyond numbers of women in public bodies as the indicator for the success of quotas, but suggests comparative research is difficult because there are so many types of quota. The major types of quotas include closed and open party lists and reservations. The use of each of these varies according to the type of voting system present.

## Overview: impact of quotas on women's marginalisation

Hughes (2011) uses hierarchical linear modelling to look at how quotas influence the election of women from 300 racial, ethnic or religious groups across 81 countries. She finds these mechanisms rarely challenge majority male dominance of national legislatures. International IDEA (2013) presents a large set of case studies on quota adoption and suggests these show a very mixed picture on transformational change in terms of

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[6] Globally, greater numbers of women are elected under systems with political parties using closed lists under proportional representation, than in electoral systems which are decided by majority votes (Tripp and Kang, 2008).

reductions in poverty and improved access to services for women as a whole, as a result of inclusion in political spaces.

Palmieri (2011), in a global survey of gender sensitivity in the operation of parliaments, notes that institutional barriers such as sitting hours and committee structures need to be challenged and changed for the effective inclusion of women. This issue appears several times in the regional literature. She concludes that understanding the cultural and institutional roadblocks to women's participation is critical in increasing the diversity of women who can enter the political arena.

What is clear from the large body of evidence on this topic is that, although quotas can increase the numbers of women in political decision-making bodies, this does not necessarily have a transformative impact in relation to the marginalisation of women in society. This may reflect the motivations and political context in which quotas are adopted, and the fact that they can constitute a form of window-dressing. Bush (2011) asks why countries where women have low status adopt gender quotas. Her analysis suggests a heavy influence of international actors, particularly in post-conflict situations and in countries with a heavy reliance on foreign aid. Tadros (2015) also cautions that the presence of politically conservative women in legislatures can reinforce the marginalisation of women in society.

In the following sections, we explore the empirical evidence on the nature of quotas and their implementation. This evidence is arranged by region as there are thematic and contextual factors in common. The nature of the evidence is heavily influenced by the methodology used, and our inclusive approach to research evidence of a variety of designs leads to a nuanced and complex picture. Table 1 provides an overview of the studies we draw up on in this section.

**Table 1: Overview of studies on political reservations for women**

| Type of intervention | Policy/programme | Main studies |
|---|---|---|
| Electoral quotas for women | Global and regional comparisons of party quotas/reservations/voting systems | Dahlerup et al. (2013), Baldez (2004), Ballington and Matland (2004), Krook (2013), Tripp and Kang (2008), Tadros (2015), Weldon and Htun (2013) |
| | Reservations for women in India | Ban and Rao (2004), Beaman et al. (2011, 2012), Bhavani (2009), Chattopadhyay and Duflo (2004), Halim et al. (2015), Kumar and Prakash (2012), Pande (2003), Rai (2013), Randall (2006) |
| | Electoral reservations in Rwanda | Burnet (2011), Devlin and Elgie (2008), Kagaba (2015), Powley (2007), |
| | Electoral reservation in other Sub-Saharan African countries | Clayton (2014), Hassim (2014), Scribner and Lambert (2010), Wang (2013), Ward (2006), Yoon (2008, 2011) |
| | Electoral quotas in North Africa | Castillejo and Tilley (2015), Chambers and Cummings (2015) |
| | Electoral quotas in Latin America | Friedman (2009), Htun (2016), Htun and Piscopo (2010), Piscopo (2011), Sacchet (2008), Zetterberg (2009) |

### 3.1.1 Impacts of quotas for women in local government in India

The majority of the quantitative empirical research on the impacts of women's political representation focuses on local government reservations in India. In 1993, the 73rd Amendment to the Constitution of India stipulated that states should release more funds to local village councils (*gram panchayats*) and enforce reservations for the leadership *pradhan* (chief executive) covering women and SC/ST groups. The randomised allocation of reservations in one third of seats provides the possibility of statistical comparisons. Using this situation as one of natural experiment, researchers have drawn a number of conclusions.

**First, women leaders invest in services that are of more interest to women and improve outcomes for them.** Beaman et al. (2011) is a good

starting point for this group of studies. They argue that studies demonstrate that men and women differ in their political and policy preferences and that actually implemented policies are likely to reflect policy-makers' preferences (Pande, 2003). Studies showing that increased female representation in politics is associated with significant changes in policy-making include Chattopadhyay and Duflo (2004), Clots-Figueras (2011) and Munshi and Rosenzweig (2010).

Chattopadhyay and Duflo (2004), in a much quoted study with evidence from West Bengal and Rajasthan, present evidence that presence of **women leaders is linked to greater investment in public services of relevance to women, such as water**. In both study locations, women leaders appeared to prioritise investments in water. In West Bengal, they also favoured investments in roads. This survey was conducted in a total of 256 villages with the *gram panchayat* head. The study also finds women are perceived as being less competent as leaders. Min and Uppal (2014) present tentative evidence that villages in India with reservations for female leaders have improved service delivery, using evidence from satellite imagery of night time lighting as a proxy for electrification. They attempt to correlate this with areas of reservation and argue for the existence of a link between reservation and the presence of electricity. (This research is included as interesting but is grey literature and conclusions need to be treated with caution.)

Clots-Figueras (2004) presents econometric research showing **the background of the women legislator matters.** She finds SC/ST women leaders may favour housing spend, whereas elite women favour spending on higher levels of education. Unlike in the case of West Bengal, she finds women leaders spend less on roads overall. Based on long-term panel data from 1967 to 1999, her conclusion is that caste and gender do influence spending decisions in the *gram panchayat*. Halim et al. (2015) find some quantitative evidence that more women in reserved SC/ST seats increase investment in school amenities but suggest this may be because this is an arena where women are 'allowed' to make decisions. However, this relationship is not linear. As such, their conclusion is rather tenuous and they suggest this issue requires more nuanced research.

Other outcomes are attributed to reservations for women. Kumar and Prakash (2012), looking at Bihar, suggest that, with political decentralisation and women's leadership, **women are more likely to give birth in a health facility**. They attribute this to women being more

interested in the concerns of women. The chain of causality in the article is quite vague as to the nature of this linkage.

Ghani et al. (2014) try to link female entrepreneurship and female reservation in local government by showing a connection between women starting businesses and political reservation. They suggest that, **in the period that coincides with political reservation, women have started more home-based informal businesses**. The link seems tenuous and does not analyse the political and economic contexts of the period.

Iyer et al. (2011) claim women's increased representation at local level coincided with a substantial **increase in the reporting of crimes against women**, and that this means women leaders are taking crimes against women more seriously. Similarly, Jayal (2006) finds women are prepared to make more complaints about alcoholic husbands to women leaders.

Deininger et al. (2015) present evidence that suggests women leaders are not seen as being as effective as men, and that this has negative impacts on people's perceptions of service quality. However, increased women's leadership has had **positive effects in increasing the level and quality of women's political participation, the ability to hold leaders to account and the willingness to contribute to public goods. They also suggest key effects persist beyond the reserved period and impacts on women may materialise only with a lag.**

Pathak and Macours (2013) set out research that shows the long-term impacts of reservation of local political seats for women on child nutrition and learning outcomes in rural Andhra Pradesh. It uses the Young Lives panel dataset to analyse the impact of being in a reserved seat during gestation and early years. Their hypothesis is that women's political reservation may have improved conditions during pregnancy and early childhood, and they measure the longer-term impacts on children's test scores in numeracy and language capability and their height and weight. **Their results seem to suggest children whose early years are in reserved seats have better scores on tests.** These results are supported by evidence of better-quality education and health infrastructure. This is an interesting and potentially significant study, though further analysis from other states would be required to confirm these results.

**Symbolic representation: the acceptability of women in politics increases through their presence.** Beaman et al. (2009) use surveys from West Bengal in 1999–2003 and find previous exposure to women's leadership through rotating reservations decreases bias against women candidates in unreserved elections. They also find limited evidence for

tokenism of women candidates, in that they are not strongly influenced by their spouses to stand for election. Bhavani (2009) supports this with a natural experiment in Mumbai that suggests previous exposure to a female leader has positive effects on the likelihood of women being elected in future. Nanivadekar (2006) argues that having women in the political space is very important to increase acceptance of them playing these roles, even if they have limited room to take action.

Beaman et al. (2012) take the analysis of symbolic representation further using a large-scale survey of more than 8,000 adolescents aged 11–15 and their parents in 495 villages. This suggests having women leaders has a role model effect on adolescent girls by reducing education disparities and reducing time on spent on household work (by 18 minutes a day), but it does not increase market opportunities for women.

**Descriptive inclusion but limited voice?** It is striking evidence generated by qualitative political and anthropological research approaches tell a more nuanced and less positive story about the outcomes of reservations on women's role in political institutions. However, there is also quantitative research that suggests weak impacts from women's inclusion in the local government space.

Rai (2013), in a study of women in local government institutions in Bihar, using qualitative methods, finds **reservations for women** can be an important factor in some individual women's empowerment at village level but are **not a guarantee of actual participation of the elected women**. The study identifies supplementary policies as improving the possibility that reservation women will be able to take action: building their self-confidence, increasing their capabilities in politics and organisational management and reducing operational barriers.

Mangubhai et al. (2009) support these conclusions in a study of 200 Dalit women in Gujarat and Tamil Nadu. They find only around a third of the women are able to act with independence and freedom to win the *panchayat* elections. A range of factors relating to education, experience on social and political issues, motivation to bring development to their community, prior *panchayat* performance and political negotiation skills, combined with external factors such as family support, good relations with other villagers, economic stability and family political contacts, influence how women access positions. Given the low social, educational, economic and gender status of Dalit women, dominant forces can challenge and overpower them relatively easily. The authors conclude that, **for the majority of Dalit women, the *panchayat* election process masks strong, caste-based patriarchal control over them.** They estimate

around 85% of Dalit women are pushed into *panchayat* politics primarily by dominant castes or their husbands. They also find dominant castes through women's husbands try to manipulate the elections through pressuring lower-caste men to use their wives as proxy leaders.

Ban and Rao (2008) examine claims of 'tokenism' in relation to the women into reserved seats. Their evidence is taken from Karnataka and Kerala and suggests reservations do not result in the election of weak women, and most are not influenced by their spouses to stand (although 20% are). They find **women are leaders of equal quality to male leaders and do not make decisions on the basis of their gender.** This runs counter to the findings of Chattopadhyay and Duflo (2004). Ban and Rao suggest this difference may be the result of lower levels of gender discrimination in Karnataka and Kerala than in Rajasthan and West Bengal. One interesting finding is that **women leaders are less successful in terms of having high-level political contacts than male leaders.** This suggests issues around political and social capital that are harder for women to overcome, as Rai (2013) also concludes.

Bryld (2001) argues that decentralisation has led to a capturing of power by a rural elite. His qualitative fieldwork, like that of Rai (2013) and Ban and Rao (2008), shows significant barriers against women attending and speaking at meetings. These can be related to time, language, social norms or education. Barriers from female members of their households also discourage their participation in meetings. This is a small qualitative study but has some interesting insights that are similar to those in other literature on decentralisation, participation and empowerment. Similarly, Vijayalakshmi (2002) presents qualitative evidence on the political inclusion of Adivasi women. The study finds that, even if they are elected, they do not feel part of the political process and still need to focus more on their everyday survival needs. The research gives examples of women who are unaware they have even been nominated for election and argues that **radical restructuring of political processes needs to follow affirmative action to allow for the meaningful inclusion of women.**

From the above evidence, it is not possible to conclude that political reservations for women in local government have been transformative. The World Bank (2011) likewis econfirms the conclusion that local quotas in India **cannot be considered to have a transformative impact on women's lives.**

There is also a notable continued low level of women in the national legislature, where quotas are still being resisted. Randall (2006) raises the

question of why, if local quotas are so successful, the number of women elected to national parliament is so low and legislation to propose 33% representation for women in parliament is so vehemently opposed. In 2015, women still comprised only 12% of parliamentarians in India.[7]

Basu's (2005) analysis which suggests that political parties have not been particularly effective in advancing women's representation in South Asia, even though they use women as symbolic resources. The is a danger of women rising as appendages to men and more attention should be given to building the strength of women's movements.

We should also take some care not to separate women from other aspects of their identity and context. Halim et al. (2015) present research that reflects on intersecting identities and also provides a useful summing-up of other literature from this study. Their analysis suggests that caste overrides gender in terms of decision-making. They also remind us that history and context matter: India's southern states have more of an activist tendency, which aligns caste and women's movements.

What is also striking in this review is the dominance of India on this debate in South Asia. There is very little robust research evidence on political quotas for women in other parts of the region. We might have expected more on donor-influenced post-conflict environments such as Afghanistan and Nepal. Hence this does appear to present a significant gap. True et al. (2012) find that women's representation is below the global average in all four sub-regions of the Asia-Pacific region. This research does suggest gender quotas and reservations have significantly improved women's descriptive representation at national and local levels, most notably in Mongolia, Nepal, Timor-Leste, Afghanistan, New Caledonia and the non-independent territories of French Polynesia. However they caution that high-level women and men may undermine gender quotas in political debates and that, for the successful adoption of gender quotas, **women's movements need to be consolidated and supported.** They also warn that **political parties, in unstable regimes across Asia-Pacific, can be family-run political enterprises that allow for elite women's participation but present considerable barriers to non-elite women.**

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[7] http://data.worldbank.org/indicator/SG.GEN.PARL.ZS

### 3.1.2 Sub-Saharan Africa and North Africa

There are few studies on political quotas and reservations for women across Sub-Saharan and North Africa. Ballington (2004) suggests quotas and reservations have been very successful in increasing numbers of women in government across Africa. This large comparative report suggests that, in the decade to 2002, either legislative or voluntary party quotas increased representation 10-fold. While quotas may increase numbers, many of the authors of the case studies in this edited report question whether this leads to women's empowerment (such as Tamale on Uganda or Abu Zeid on Egypt in IDEA, 2013). The report concludes there is a need for more transformative effort rather than just descriptive representation.

As in India, there is some evidence that increasing numbers of women in politics can lead to greater symbolic representation of women in leadership. Barnes and Burchard (2012) use time series data from the Afrobarometer survey to test the idea that an increase in women's representation, even if only by elites (descriptive representation), does diminish the gap in interest in politics between men and women. They suggest this gap disappears when there is around 25–30% national representation of women.

For individual countries there are very few studies. The only slight exception to this is Rwanda unsurprising given the country's dominance in league tables of women's political representation.[8] Rwanda is a relatively small country and therefore it should be easier to examine the impacts of its high number of female legislators. Of the 80 seats in the Lower House of Deputies, 24 are reserved for and voted for by women. Women also stand in seats for open election. Of Senate seats, 30% are reserved for women. This combination of mechanisms **gives Rwandan women the highest share in the national parliament of any country's women.**

Powley's (2007) work is cited in the wider literature, seeking to link the presence of women in legislatures to better outcomes for women, alongside that of Chattopadhyay and Duflo (2004) as evidence of substantive representation through policy-making, although it is a very different type of study. Chattopadhyay and Duflo (2004) use quantitative analysis, whereas Powley (2007) is a qualitative case study. Powley's qualitative and political analysis suggests women legislators in

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[8] http://www.ipu.org/wmn-e/classif.htm

Rwanda have taken the lead on pro-child legislation and are strong advocates for the needs of children in the budget. Her research acknowledges constraints on the effectiveness of women in parliament as it is a relatively weak institution. She also notes **women's role is constructed in terms of their responsibility as mothers rather than a broader set of dimensions.**

Similarly, Burnet (2011) presents an interesting and nuanced ethnographic account that teases apart the high-level representation of women in Rwanda. As does Powley (2007), she notes the **critical link to the post-genocide context and the strength of the women's movement**. Given the dominance of Kagame and the Rwandan Patriotic Front (RPF) in Rwandan politics, she sees their strong influence in shaping the political space. The RPF approach is to promote women through the party structure and thus there are claims that female representatives' allegiance is to the RPF rather than other women. **Do they represent women and citizens or the party that has placed them in the reserved seat?** Burnet suggests mixed evidence on women legislators bringing in more women-friendly legislation. While there is progressive gender legislation, such as harsher penalties for gender-based violence, in 2009 parliament voted to reduce maternity leave and increase the working week. Devlin and Elgie (2008) also claim **women's presence normalises their participation in politics** and has important effects in terms of solidarity, but show parliament is still not a more women-friendly environment in terms of child care provision or working hours. They note that the impacts of women as legislators are less clear on policy and perhaps it matters more that the **RFP is clearly progressive on gender, and this seems to be more crucial than the gender of the legislators**.

Burnet (2011) also suggests mixed evidence from Rwanda that high female participation results in higher female political engagement. However, she does suggest **symbolic representation is important and has helped women in general gain confidence in speaking out in public.** Her interviewees talk about women as entrepreneurs in every arena, including politics. There is agreement with Chattopadhyay and Duflo (2004) that the presence of women in politics makes it more likely other women will be engaged and that people have changed their views on the ability of women to lead and that this is particularly influential at the local level. However, she also **suggests differential class based impacts of political engagement, which are more liberating for urban elite women but can add an additional burden for poor, rural women in local governance on top of their many existing responsibilities.** She

also notes that increasing gains for women have led to **increased friction in relationships with men and some men withdrawing from the political space.** This appears to be particularly in relation to increased inheritance rights, which has led to new tensions with male siblings.

Kagaba (2015) notes the importance of the constitution in Rwanda and in qualitative research explores the gains and losses for women in the constitutional adoption of equality, particularly in relation to inheritance rights. She finds women are very positive in terms of awareness of their rights and increased confidence of their own value. However, like Burnet (2011), she finds some evidence that this increased assertion may have contributed to a breakdown in family life.

In further qualitative work, Debusscher and Ansoms (2013) **cast doubt on how far descriptive representation can overcome structural inequalities.** However, they do find good evidence on post-conflict social change that has increased the role of women in civil life and contributed to their acceptance as leaders. The key message is that the large numbers of women in public life have not yet been transformative but are instrumental. While strong political will and target-driven policies offer opportunities to promote gender equality, transformative potential is undermined by 'the dominance of an underlying economic rationale; the neglect of the "invisible labour" of women; the formalistic implementation of gender policies and their focus on quantitative results; the limited scope for civil society voices to influence policy; and the lack of grassroots participation' (p.1111).

Similar to the conclusions on Rwanda above, Clayton (2014) presents evidence on Lesotho that the presence of women, even if not directly transformative in terms of legislation, is starting to shift social norms concerning the role of women in public life. Lesotho has 30% women-only reservations in local electoral divisions and, when survey data on reserved areas are merged with Afrobarometer data, they suggest the greater representation of women reduces the power of the local chiefs. However, the data show women are perceived as having legitimacy in some areas more than others, with women councillors seen as not having the authority to deal with issues of land and grazing.

A number of other countries in Sub-Saharan Africa have employed reserved seats for women and this has led to a substantial increase in their numbers in local and national government. Wang (2013), writing about Uganda, argues the country has been a pioneer in increasing the number of women legislators through the use of reservations. In her analysis of Rwanda, Burnet (2011) suggests the RPF was inspired by the Ugandan

approach. However, this research suggests pro-women legislative outcomes were poor from 1996 to 2006 but several pro-women laws passed in the 2006–2011 multiparty period. Increased numbers of women in parliament may have contributed to pro-women policies. They find other important factors include the role of the women's caucus in parliament, alliances with male legislators and strong relationships between female legislators and actors in civil society and the aid community.

Tanzania has also followed a policy of reserved seats for female candidates at every level of government. Yoon (2008, 2011) examines the evidence on the special seats in place since 1985 and asks why they have not had more impact. Women make up 30% of national government through reservations but only 7% of elected seats. Yoon (2008) cites many examples of patriarchal discrimination in political campaigns, such as allegations of prostitution when women contest seats. She notes that women also lack resources to contest elections. In 2005, only five women were elected without special seats. Women in these special seats often enter cabinet in Tanzania and so may mask poor levels of elected representation. However, Yoon does note that women who have held special seats can go on to compete for elected seats, as they have accumulated experience and political capital. Yoon (2011) explores the limited impact women in special seats have been able to have in effecting substantive representation and the many barriers women face in working in the parliamentary system.

Ward (2006) examines reservations for women in Eritrea, Tanzania and Uganda and again finds a need to go beyond descriptive representation in counting numbers of women in parliament. In all three country case studies there is little evidence of transformation. It is argued that **reservations are connected to political projects of unity and the mechanism is vulnerable to political manipulation.** For women in reserved seats, as discussed earlier in relation to Rwanda, loyalties to political parties or patrons are often stronger than commitment to enhancing the position of women.

We expected to find a significant body of literature from South Africa on women's political participation, given that gender equality is enshrined in the constitution and the relatively high numbers of women in political bodies. In fact, we found limited research on the impact of women's political representation.

Scribner and Lambert (2010) compare the constitutions of Botswana and South Africa. They argue that the countries reveal a complex political

context in which constitutional provisions are one of several factors affecting policy. Other factors include activism by women's movements and ruling party commitment to gender equality. Constitutional provisions do not in themselves drive policy change. Women's movements in Botswana and South Africa have been critical actors in shaping policy change, but their efforts have had different degrees of success. Botswana's women's movement has struggled to combat sex discrimination and improve gender equality. On the other hand, South Africa has adopted more rights-based legislation and court actions, which is underpinned by the country's more equity-oriented politics coming out of the anti-apartheid struggle.

The importance of women's movements is also discussed in Bauer (2004) in relation to Namibia. She argues that party closed list proportional representation and voluntary party quotas acting with the women's movement have worked together to reach 29% representation of women in parliament. Her research suggests the importance of an international women's rights movement (related in part to the Beijing World Conference on Women) combined with an active local women's movement in driving through political acceptance of descriptive representation for women.

Hassim (2014), also researching the impact of women's political representation in South Africa and India, argues that women's engagement is nuanced and context-specific. As in India, in South Africa there is evidence that **women councillors favour working on water issues**. However, Hassim suggests this might be because this is one area where they are 'allowed' to make an input, as **water is seen as a 'women's issue'**. As in Lesotho (Clayton, 2014), there is other evidence that women are not seen as competent to address structural power issues such as land access.

There is also a small amount of evidence on the use of quotas in North Africa. In political economy research on women's political participation in Morocco, Castillejo and Tilley (2015) suggest the political engagement of a women's movement has led to a series of institutional, legal and policy reforms that have strengthened women's formal rights. Such reforms have then created further space for women to build their voices in formal and informal institutions: 'This iterative interaction between agency through mobilisation and institutional change through policy reforms is at the heart of the story of progress on women's political voice in Morocco' (p.6). The study also shows that

women's limited access to employment constrains opportunities for reform as most women are in a relatively weak economic position.

In a related case study on Tunisia, Chambers and Cummings (2015) again suggest change is rooted, contextualised and political. They find equality has been deeply rooted in the constitution since 1959 and in the Code of Personal Status since 1956. Investments in reproductive choice and health, plus social and legal reforms in the 1950s/1960s, were important in driving early gains for women in the political space. However, after this period progress was not so sustained. The authors argue **change can come from top-down authoritarian measures rather than women's agency, and women's empowerment needs investments in health and education and a suitable elite bargain.**

As discussed in relation to Rwanda, Tanzania and other African countries, there is some evidence that women elected under quotas toe the party line and any more radical or challenging views are side-lined. The research suggests society may remain deeply patriarchal despite gains in terms of numbers of women in the political space and argues more support is needed to go beyond this. It also highlights the danger of religious conservatism after the Arab Spring. This is also noted by Tadros (2015) in relation to Egypt, where conservative women in political spaces may actually vote to reduce progressive freedoms for women more generally. In both cases, a combination of the women's movement and the elite political bargain has been essential in finding women room to manoeuvre in the political space.

### 3.1.3 Latin America

The literature on women's political participation in Latin America is again different in character from that of India or Africa. As for the African region, the nature of the mechanisms used for women's representation does not lend itself easily to quantitative analysis beyond some descriptive statistics on numbers of women in political bodies. The literature is also to a greater degree about the nature of political change and political settlements in the region. Many papers are also comparative of a number of countries and also of categories of representation.

Friedman (2009) explores **the impact of left-wing political leadership on representation and policy outcomes for women** in Brazil, Bolivia, Chile and Venezuela. She argues that political party affiliation is

more important than gender. Through historical and political economy analysis, she argues that, where socioeconomic outcomes are addressed, the outcomes have been positive for women. However, significant barriers to women's rights remain, although some left-wing leaders have been prepared to challenge conservative positions from the church on reproductive and LGBTQ rights. Htun and Piscopo (2010) agree these are areas of conservatism that have not yet been addressed. Further, Htun (2016) argues **political party quotas and legislative reservations have led to inclusion of excluded groups without proper representation in that their presence has not enabled formal and informal processes to hold elected representatives and the political class accountable.**

There are mixed views on whether quotas have improved the symbolic representation of women. Sacchet (2008) sums up the impact of political party quotas across Latin America as being significant in terms of sending a message to institutions and social agents on the existence of gender inequalities. She suggests the need for quotas is a political message about the gendered nature of political power. She argues that far greater initiatives are required to overcome the barriers that keep most women out of politics, such as a lack of political, financial and social capital. Zetterberg (2009), in one of the rare quantitative assessment of quotas in Latin America, tests the hypothesis that greater descriptive representation leads to greater symbolic representation in that women are seen as more rightfully in the political space. Using data from 17 Latin American countries, this research finds no general proof of attitudinal or behavioural changes in women's likelihood of being involved in politics.

What does seem to be apparent from the research on Latin America is that women's movements and political parties have played a crucial role in the adoption of quotas, but that, as in Sub-Saharan Africa, this can lead to (but does not guarantee) increased descriptive representation. Furthermore, increased descriptive representation does not lead to transformative substantive representation, as structural and cultural barriers to women are not addressed.

Jones (2004) on Costa Rica argues the adoption of meaningful quotas required sustained efforts by women's groups/legislators. Araujo (2003) presents historical tracking of quantitative data on gender of representatives at different levels of Brazilian government. In 1995, quotas (the party list system) were introduced and representation increased but in 2002 it was still at only 8% at federal level. Araujo

presents a profile of women elected: on the left they are activists, on the right they have family capital. She concludes that the evidence on party list quotas at this time in Brazil is not strong as such mechanisms do not address wider structural barriers that prevent many women entering politics, such as domestic responsibilities, lack of political and social capital and lack of financial resources and sponsorship.

In relation to Mexico, Baldez (2004) examines the processes behind the adoption of gender quotas. She finds a combination of three processes is important: the adoption of the quotas themselves, a judicial commitment to enforcing them and **cross-party unity of women in pushing for quotas** as well as public acceptance of a greater role for women in political life. These themes are also emphasised in Bruhn (2003), who stresses **the importance of leftist party agendas combined with gender activism** in pushing for the adoption of quotas.

Domingo et al. (2015b) present an interesting political economy analysis of Colombia. They show some descriptive representation impact from quotas and increased legislation against VAW but suggest this is still highly prevalent and is especially conflict-related. In addition, **women politicians have more traction at the local rather than national level**. This is a theme we saw in the research on India. They note women's activism is important but patchy and resource-constrained, though it has made significant gains in constructing a public feminist narrative. Women MPs have formed a Gender Legal Committee that has supported pro-women legislation and increased their legitimacy. Domingo et al. emphasise **that political change is long term and iterative.** They conclude that **formal rules and rights are important but implementation can remain slow. International support needs to be flexible and adaptive and able to respond to opportunities to build alliances around specific issues.**

Similar to Ward's findings from East Africa, Franceschet and Piscopo (2008) argue quotas may generate mandates for female legislators to speak for women but can reinforce stereotypes about weak capacity. Their data suggest **women face barriers from institutions and from social norms.** They argue that, although Argentina was the first country in the world to legislate gender quotas, they have had a labelling effect on 'quota' women, who were viewed as less able because of having been elected through the quota. They do suggest presence of women in the political space is not strongly associated with changing policy. They argue **there may be more female- and child-friendly bills in parliament but this is not necessarily borne out in implementation, legislator**

**attitudes are poor predictors of outcome and the ideological foundations of political parties may be more important.** Zetterberg (2008), exploring data on Mexico, argues 'quota women' are not as affected by their label as might be assumed. He suggests the problems women encounter in the political space are not to do with the quota but with the political system itself and the ways it operates to construct barriers to women's involvement and influence.

However, Piscopo (2011) finds in Argentina and Mexico (which under-fills quota targets but has a gender commission), that female legislators, more than male legislators, advocate for policies dealing with health, minority rights and women's rights. She concludes that **legislative institutions and practices such as gender commissions can contribute significantly to the possibility of substantive representation of women.**

This body of evidence shows there are no clear or easy answers when it comes to assessing affirmative action for women's political participation. While there is a normative agenda in some policy circles to see descriptive representative as a proxy for substantive representation, the greater weight of evidence shows this link is not strong and varies greatly according to the political, social and economic context. Tadros (2015), in summing up an extensive set of case studies on women's empowerment, suggests a need to go beyond a focus on quotas to the barriers in formal political spaces, as opposed to more informal activist ones where women are already active. She suggests that essentialising women's common oppression across political, class, religious and ethnic lines is at odds with how political power operates. She argues for working in more overtly feminist political ways on addressing specific inequalities, for example on tackling the barriers that prevent women entering formal political spaces, such as a lack of opportunities for political apprenticeship to build a constituency.

Her argument is borne out by evidence of the role of **women's movements** in driving change for women. One study examining this at the global level – Htun and Weldon (2012) – uses an original dataset of social movements and violence against women policies in 70 countries over four decades. Their analysis suggests the most important and consistent factor driving policy change is feminist activism. They argue this is more critical than left-wing parties, numbers of women legislators or even national wealth. Like others, they show that effective domestic feminist movements use international conventions as levers to shift policy-making. More broadly, this analysis shows that social movements

can effect change when able to form alliances and to use international or national conventions or agreements as leverage. We also saw this to be the case in relation to arguments for the introduction of quotas. It is perhaps instructive to consider whether mobilisation around specific issues rather than identity-based categories might be a more effective way to address inequality and marginalisation.

## 3.2 Combating gender discrimination in education

### 3.2.1 Measures to reduce gender inequalities in primary and secondary education

Broad universalisation programmes for primary and secondary school typically aim to address many of the supply- and demand-side factors that underpin gender inequalities in attendance and educational outcomes, and there is growing evidence of the impacts of such programmes on increasing girls' attendance (Sperling and Winthrop, 2016; UNESCO, 2015; World Bank, 2012). Likewise, large-scale non-formal education, discussed in Section 4.2.2, has a positive track record in promoting girls' attendance and achievement.

There has been much recent analysis and synthesis of effective approaches to promote girls' attendance and learning, ranging from broad inclusion strategies to much more specific targeted programmes (e.g. King and Winthrop, 2015; Miske, 2013; Sperling and Winthrop, 2016; Unterhalter et al., 2014). As noted above, our review did not locate evaluations of efforts to reduce gender inequalities that disadvantage boys. In this section, we summarise evidence on the following approaches: financial incentives to encourage girls to attend and stay in school; large-scale norm change campaigns to promote girls' school attendance; programmes to promote gender sensitivity and reduce discriminatory practice within schools; and abolition of policies that discriminate against girls who become pregnant while at school. [9]

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[9] We focus on these approaches because of the availability of evidence. There is also clear evidence concerning the importance of increasing the availability or proximity of schools as a way to increase girls' enrolment and attendance in reviews such as Sperling and Winthrop (2016), World Bank (2012) and annual UNESCO Education for All Global Monitoring Reports.

## Cash incentives

A recent systematic review (Baird et al., 2013) of 75 cash transfer programmes examines the relative effectiveness of conditional and unconditional cash transfers for promoting children's school attendance and enhancing learning outcomes. It concludes that cash transfers, both conditional and unconditional, have a significant effect on enrolment and attendance but much less on learning outcomes. It does not examine whether such programmes have a differential effect on girls and boys. A rapid review for DFID echoes this finding, noting that the evidence of impacts on enrolment and attendance is clear, whereas that on learning is mixed (meaning some studies do find positive impacts on learning) (HEART, 2014: 1). Unterhalter et al.'s (2014) rigorous review of interventions to boost gender equality in education concludes there is strong evidence concerning the impact of cash transfers on both girls' access to education and their learning/attainment.10 Given these three recent synthesis studies, we do not review individual studies of the impact of financial incentives.

## Large-scale attitude and norm change campaigns

Reflecting our observation concerning the limited evidence on communication campaigns to challenge discriminatory attitudes and practices, there is surprisingly little rigorous evidence of mass campaigns to change attitudes, norms and practices concerning girls' education.

The Hey Girls, Let's Go to School campaign in Turkey is credited with encouraging 350,000 out-of-school girls to enrol between 2003 and 2006. This programme used mass media and community-based mobilisation by volunteers and professionals (e.g. health workers) to encourage parents to send their daughters to school (UNICEF, 2014). Similarly, the Welcome to School Initiative in Nepal led to a net increase in enrolment of 470,000 children, 57% of them girls. This initiative involved community-level mobilisation, economic incentives (school supplies and scholarships) and expansion of capacity to meet demand (Shanker et al., 2015).

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[10] Note, however, that the thresholds for impact do vary between contexts – for example in Haryana, northern India, the Apna Beti Apna Dhan cash transfer had little impact on schooling beyond grade 8. At this point, other concerns came to the fore, such as protecting girls' reputations in order to secure a good marriage, in a context where many girls would have to travel outside their villages to attend the next level of schooling (Nanda et al, 2015).

An evaluation of the Meena Communication Initiative in India, a large-scale multi-media messaging programme that promoted girls' rights more broadly, including the right to education, found a softening of negative attitudes towards girls' education and that, for 27% of viewers, learning about the importance of girls' education was the single most important impact (CMS, 2004). The evaluation of Taru, a radio soap opera in India that promoted gender equality, found that, compared with people who did not listen to this programme, Taru listeners were significantly more supportive of the view that girls should be allowed to continue studying as much as they want, and were more likely to disagree with the view that, when resources are scarce, only boys should be sent to school (Singhal et al., 2004).[11]

## Promoting gender-equitable school environments

Our review did not find any evaluations of large-scale gender mainstreaming programmes in schools or programmes aiming to promote more gender-sensitive attitudes and practices among teachers. Unterhalter et al.'s (2014) rigorous review of programmes and practices to promote gender equality in education identified gender mainstreaming as an approach, for which positive evidence exists, though more is needed; Miske's (2013) review also highlights a number of positive, mostly small-scale, examples, as do more recent studies, such as Schwandt and Underwood (2016). Unterhalter et al. (2014) point out mainstreaming gender equality requires 'considerable resources in terms of money, time, skill, support and opportunities for critical reflection and communication, way beyond that planned for or provided' (p.41), a conclusion Schwandt and Underwood support: they found much greater impact from an intervention to promote a gender-equitable school environment in Botswana, where resources devoted to the education sector as a whole were greater than in Malawi and Mozambique.

One much discussed example that provides pointers towards models for gender-sensitive secondary education comes from a medium-scale programme in northern Honduras. An NGO-led programme, the Sistema de Aprendizaje Tutorial (SAT), has developed a critical, gender equality-promoting, pedagogy and curricular materials that have inspired and been adapted for use in other parts of Latin America and Sub-

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[11] Both studies made use of mixed methods, though quantitative survey data formed the mainstay of the evaluation, particularly for Taru.

Saharan Africa (Murphy-Graham, 2012; Murphy-Graham and Lample, 2012). The SAT curriculum emphasises critical thought, acquisition of practical skills and values of equality (Murphy-Graham, 2010, 2008). In Honduras, where SAT has been enfolded within the formal education system, while keeping its distinct shape, it has been found to lead to better educational outcomes (by 0.2 standard deviations) at 10% lower cost than mainstream middle schools (McEwan et al., 2015) as well as an increased sense of agency and empowerment among participants (Murphy-Graham, 2008, 2010, 2012).

One other approach to promoting more girl-friendly school environments has been to reduce gender-based and other physical violence in schools. Again, we found little evidence of large-scale policies and programmes (though several medium-scale programmes, working in over 40 schools, have piloted approaches towards reducing school-based violence), and two reviews (Leach and Dunne, 2014; Unterhalter et al., 2014) have found very few rigorously evaluated studies. A mixed-methods evaluation of a multi-country NGO programme, Stop Violence Against Girls, which took place in Ghana, Kenya and Mozambique, found school-based girls' clubs had a clear positive effect in promoting a more girl-friendly environment, and boys' clubs had helped boys develop more egalitarian behaviour and attitudes (Parkes and Heslop, 2013), while the evaluation of Transforming Education for Girls in Nigeria and Tanzania found girls' club members had stronger academic performance and greater knowledge of HIV/AIDS, life skills and their rights, were more challenging of discrimination and violence and had more ideas of how to overcome obstacles than non-club members (more so in Tanzania than in Nigeria) (Leach and Dunne, 2014).

There are also positive small-scale examples of promoting gender-equitable attitudes and practices in schools (Achyut et al., 2012; Bajaj, 2009) but limited evidence of large-scale changes to tackle these dimensions of the discriminatory environment girls face.

### Re-entry policies for pregnant school girls

Although a number of Sub-Saharan African countries have amended policies or repealed laws that previously discriminated against pregnant schoolgirls by expelling them, treating them differently to boys who fathered children while at school or otherwise impeding their right to education, there is very little published literature assessing the impact of these policies. Qualitative evidence suggests implementation is often

patchy, because of school and community resistance or ignorance of policies, and that girl mothers who wish to return to school are still excluded from school on 'moral grounds' (Bantebya et al., 2013; Chilisa, 2002; Mwansa, 2011).

A much-cited case study is that of Zambia, where the policy on schoolgirl pregnancies was amended in 1997 from automatic expulsion to facilitate girls' re-entry to school. As a result, 76% of the 3,738 high school girls who became pregnant between 2002 and 2005 were re-admitted (Ministry of Education, 2006, in Bunyi, 2008). More recent data suggest around 65% of girls who become pregnant at school re-enter (Wedekind and Milingo, 2015). In-depth exploration of the factors affecting whether girls return suggests that having sufficient funds to continue, while bearing the additional expenses of having a child, the availability of a care-taker and a lack of stigma at school are key factors. Lack of stigma, in turn, depends on schools creating supportive and non-discriminatory environments – Wedekind and Milingo's study suggests more comprehensive sex and relationships education could help achieve this goal.

The passage of this policy illustrates the politics of anti-discrimination policies in some aid-influenced low-income countries – the re-entry policy was advocated by local women's organisations and designed by enthusiastic bureaucrats, as it was seen as a step towards meeting international legal commitments on children's rights, and was supported by major donors. The forces propelling its implementation mean it was implemented before it was approved in parliament and despite some stakeholders, such as teachers, not being properly informed. The policy has proved controversial, with some churches particularly opposed, particularly to the lack of proper debate and consultation, and mixed views in civil society as to whether it is encouraging non-marital pregnancies (Mwansa, 2011). More studies exploring the politics of implementing anti-discrimination policies would be instructive.

### 3.2.2 Access to higher education

Analysis focuses particularly on encouraging women to study STEM subjects, where gender disparities are greater and potential returns are often highest. The three studies we located of affirmative action to boost women's participation in higher education all examine policies and approaches in Anglophone Africa: Ghana, Kenya, Tanzania and Uganda.

Responding to a situation where women make up less than half of university entrants and in many countries less than a third (Griffin, 2007, in Bunyi, 2008), universities have typically sought to promote greater participation of women across the board by lowering entry requirements by one or more grade points (Onsongo, 2009) and/or by providing access courses, particularly in STEM subjects.

Lowering entry requirements has been the most common policy: Bunyi's (2008) study of affirmative action for women in African higher education finds such measures have been applied in at least six countries. In some, these appear to be university policies; in others (e.g. Uganda), there is a constitutional basis for such provisions. These lower entry requirements appear to have increased women's enrolment. For example, in Kenya, an estimated 300 additional female students per year enrol in public universities as a result of lower entry requirements from women. Following Uganda's Makerere University awarding female students a 1.5 points bonus on entrance exam results, the share of female students increased from 23.9% in 1989/90 to 45.8% in 2003/04 (Onsongo, 2009). A similar programme at the University of Dar es Salaam led to the proportion of female students increasing from 15% to 27% (ibid.).[12]

Lower entry requirements for women have been criticised on several grounds: they do not directly help the most marginalised and poorest women into higher education; they do not necessarily lead to any more women studying STEM subjects (Bunyi, 2008); and they reinforce stereotypes of women's lesser intelligence or capacity (Bunyi, 2008; Morley et al., 2011).

A 2004 review of students accessing Makerere University's affirmative action scheme for women (1.5 point lower entry requirements) reveals approximately 90% of beneficiaries come from more privileged families, most of whom would have accessed university education without the scheme. As a result, the university introduced 25 scholarships for women from rural areas to study STEM subjects (Onsongo, 2009); beyond Onsongo's comment that this is too small a number to have a significant impact on poor women's access, no evaluations of the impact of the scholarship scheme in supporting poor women's access could be found for this review.

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[12] The timeframe for this comparison is not given – it is merely reported as 'before' and 'after' affirmative action.

Some universities have sought to counter differentials in women's participation in STEM-based courses of study by modifying entry requirements or giving preferential admission to female students (e.g. Gulu University in Uganda awards female applicants for science, maths and technology degree programmes 2 points instead of the national 1.5 (Okwakol et al., 2005, in Bunyi, 2008). At the Kwame Nkurumah University of Science and Technology, Ghana, in 2007/08, all qualified female applicants were offered admission into the Bachelor of Science Mechanical programme (Effah et al., 2008, in Bunyi, 2008)).

Others have provided remedial/access courses to address lower levels of qualifications among girl school leavers. Bunyi (2008) cites evidence that the University of Dar es Salaam's free six-week remedial course in science and mathematics for borderline female candidates, instituted in 1997, led to 214 female students entering highly competitive STEM-based courses such as engineering, medicine and architecture, and has been replicated in Tanzania's Sokoine University of Agriculture. The proportion of female students starting engineering courses at the University of Dar es Salaam rose from 7% in 2003/04 to 18% in 2004/05 and 21.2% in 2005/06 (Gender Centre, 2008, in Onsongo, 2009) as a result. However, a similar programme at Kigali Institute of Science and Technology in Rwanda became too controversial and had to be abandoned after only one intake (Huggins and Randall, 2007, in Bunyi, 2008).

The studies examined typically did not consistently explore differences between public and private universities in their commitments to affirmative action, though gender differentials in enrolment rates are often lower at private universities. Bunyi (2008) suggests three possible reasons for this: many private universities are run by religious bodies, and are perceived as offering better protection and moral guidance to young women; many offer primarily arts-based courses, which disproportionately attract women; and they are attended primarily by elite students from families with sufficient resources to finance higher education for all their children and thus are not rationing resources on gendered grounds.

Such evidence as is available suggests outreach and access courses have been successful in boosting women's enrolment and graduation rate on STEM courses. For example, Sokoine University in Tanzania has implemented an outreach programme where female academics visit upper-secondary schools and encourage girls to enrol for the forestry degree course. As a result, the percentage of female Bachelor of Science

Forestry students increased from 3.3% (1987–1992) to 10.9% (1993–1996) (Abeli et al., 2005, in Bunyi, 2008).

The literature reviewed provides limited insights into the impact of affirmative action on women's learning outcomes and degree pass rates, making it impossible to confirm or refute the common view that students admitted through affirmative action perform less well than those admitted on merit alone. Data from the University of Dar es Salaam (Onsongo, 2009) indicate that participants in short remedial science courses went on to form over 50% of the top 20 biology and chemistry students in 2000/01. More data from a wider range of universities and subjects and a longer time period are needed to fully assess the impact of short access courses. Comparison of educational outcomes between students admitted on merit alone and those benefiting from reduced test score admission policies are also needed to build a clearer picture of the impact of affirmative action on women's tertiary education outcomes.

## 3.3 Combating gender discrimination in labour markets

### 3.3.1 Quotas and anti-discrimination legislation

The review located very limited evidence of affirmative action measures in place for women in the labour market, despite widespread recognition of the discrimination they face. The ILO Equal Remuneration Convention is the fourth most ratified convention overall – yet data show women earn between 31% and 75% less than men over their lifetime, and there is no region where the gender gap has been eliminated (Fontana and Paciello, 2007; UN Women, 2015). Gendered disadvantage accumulates over a lifetime as differences in labour force participation rates, types and formality of employment, levels of education, presence of social transfers, unpaid care work and social norms and expectations interact to shape women's experiences in the labour market (UNDP, 2015; UN Women, 2015).

Quotas are one way of breaking down occupational stereotypes, although there is very limited evidence on their impact in practice. UN Women (2015) states that employment quotas for women have been more successful in tackling vertical than horizontal segregation, through quotas for women on corporate boards. There are examples of success from Organisation for Economic Co-operation and Development

(OECD) countries here. For example, Norway introduced a quota of 40% for corporate boards in 2006, which was fulfilled within two years.

For this review, we located only three studies on the impact of affirmative action policies on women, all on South Africa. Bezuidenhout et al. (2008) describe the gendered nature of the South African labour market: Black women are underrepresented and work predominantly in lower-end occupations; women generally are underrepresented in all occupations except as professional, technical and associate professionals, clerks and skilled agricultural and fishery workers; and men are overrepresented in all occupations except these. The number of women who are legislators, senior officials and managers and professionals has increased slightly. Mathur-Helm (2005) also examines the employment data to find it remains uncommon for women to reach the top levels of management and argues that corporate environments are not yet ready to accept women as equals, a finding reinforced by Bezuidenhout et al.'s case study of a White manufacturing company that is doing well on the inclusion of members of different racial groups in the workforce but has no women in management. Bhorat and Goga (2012) examine national employment data over the period 2001–2007 and find no significant decline in the wage gap between women and men; this is the only study we located that goes beyond a descriptive statistical analysis and uses Oaxaca-Blinder techniques to decompose the explained and unexplained proportion of the gap. The analysis shows 71% of the gap reflects unexplained factors – or discrimination – highlighting the persistence of gender wage inequality.

Our literature search found no evidence on the impact of maternity rights legislation, collective bargaining or the bringing of anti-discriminationcases that fit the criteria of the review. This may reflect women's predominance in the informal sector, where implementing and measuring the impact of this kind of policy may be more challenging, as well as a lack of policy. For example, a 2010 ILO review of maternity legislation found that, in Africa, only 39% of countries reviewed provided benefits in accordance with ILO standards; in Asia, only two of 23 met the requirements. This is an important area for future research, and is complemented by recent work on paternity and men's contribution to unpaid care work as summarised in Edstrom et al. (2014). The impact of universally targeted measures, such as the introduction of minimum wage legislation or universal social insurance, is beyond the scope of this review, but is a measure that has the potential for positive impacts for women in the labour market.

There is an emerging body of evidence on efforts to improve conditions for migrant female domestic workers. Satterthwaite (2014) and D'Souza (2010) both look at the potential of a rights legislation-based approach building on the 2013 ILO Convention on Domestic Workers. An example of success here is legislation achieved by migrant domestic workers in New York (UN Women, 2015) and domestic workers in Chile and Bolivia, who have organised in the face of elite resistance to secure legal reforms and improved working conditions (Blofield, 2009).

A more negative impact emerges from the one study we located that dealt with the impact of legislation in countries sending migrant domestic workers, designed to prevent migration into exploitative working conditions. For example, ILO (2015) considers the impact of legislation in Nepal introduced in 2012 that banned women under 30 migrating to the Arab States for domestic work, subsequently amended in 2015 to allow women over the age of 24 to work in certain destination countries in South East Asia and the Arab States. Interviews with stakeholder and migrant women found the ban did not prevent women from migrating and instead forced them to go through irregular channels, giving them less control of the experience and placing them at greater risk of violence. Two papers were located that described legislative attempts to regulate the recruitment of migrant workers. Agunias (2012) looks at regulating recruitment agencies in Asia and stresses the practical difficulties of this work across borders and the need for government commitment in both origin and destination countries if regulations is to be effective. Manseau (2006) concludes that the introduction of standard working contracts for migrant domestic workers would be effective in reducing discrimination.

## 3.3.2 Impact of vocational training programmes on young women

We found evaluations of three vocational training programmes in Latin America that disaggregated impacts by gender. These programmes offer three months of classroom training followed by private sector workplace internships (three months in Colombia and two months in the Dominican Republic). In Panama, ProCaJoven was a similar programme evaluated through a natural experiment, combining classroom training with a 172-hour internship; for first-time job seekers a longer job placement was provided. All participants received a transfer of $255.

Two of these evaluations show stronger impacts on women than men. Attanasio et al.'s (2008, 2011) analysis finds the programme in Colombia (Jóvenes en Acción) had much larger impacts for women than men, with positive impacts on wages, number of hours worked and probability of employment. For men, there is a positive significant impact on the likelihood of having a formal employment contract (6%). For both men and women, the programme has positive impacts on wages in formal employment – an increase of 23% for men and 33% for women – though men who remained in self-employment experienced a drop in earnings compared with the comparison group following participation. The Colombian programme is unusual in that long-term follow-up data are available. Attanasio et al. (2015) use administrative data collected between 2008 and 20015 and find a significant positive effect on the likelihood of employment in the formal sector and that the stronger impact for women continued. In Panama, ProCaJoven showed no significant impact for men but an increase in wages and employment among women – particularly those living in Panama City (Ibarraran and Rosas Shady, 2006).

Card et al. (2011) report on the Juventud y Empleo (JE) programme in the Dominican Republic, which had a significant dropout rate and does not include gender-disaggregated data on employment impacts. At 10–14 months after completing the training there was no impact evident on employment and a positive impact of around 10% on wages. Ibarraran et al. (2012) use data from a cohort that received training from the JE programme in 2008 and also find that overall there was no significant impact on employment – although there was a small positive impact on the likelihood of men having formal employment contracts. This evaluation also measures the impact of the programme on risky behaviour and pregnancy and finds the programme has had a positive impact in terms of youth perceptions about their current situation and aspirations for the future, with stronger impacts for women and younger participants.

There is limited discussion of the implementation of these programmes. Card et al. (2011) speculate that the design of JE meant few employers were using the internships to recruit workers: as the programme fully subsidised interns' wage costs, they had a strong incentive to fill the slots with trainees rather than take on full-time workers. The iteration of the programme seems to have addressed some of these concerns by working more closely with employers in order to provide training for real vacancies and placing more emphasis on 'job readiness skills' (Ibarraran et al., 2012). Ibarraran and Rosas Shady (2006)

highlight difficulties in implementing the programme, with spending at 30% of allocated resources after two years of operation and reaching only 3,700 beneficiaries. Political and institutional failures are implicated here but there is no further discussion of these factors or how they could be resolved.

As one review noted, the successful Jóvenes programmes rely heavily on a positive macroeconomic context, particularly in terms of job creation (Ibarraran and Rosas Shady, 2009). In the absence of robust private employment growth, job skills development programmes have generally performed poorly. We were not able to locate a body of political economy analysis that examines these relationships in more detail.

### 3.3.3 Training targeted at women and girls

Large-scale training programmes for more specific groups are rarer in the literature. We located two studies that consider programmes targeted at the specific training needs of adolescent girls or young women, with the objective of helping them enter the workplace. In comparison with the Latin American training programmes, these offer a more supportive approach with an emphasis on forming social networks.

All of the studies included here are reports of pilots undertaken by the Adolescent Girls Initiative, which ran between 2008 and 2015 as a partnership between the Nike Foundation and the World Bank. The programme conducted pilot studies in Afghanistan, Haiti, Jordan, Lao PDR, Liberia, Nepal, Rwanda and South Sudan. Table 2 gives an overview of the studies currently available from this programme as considered in this section. Smaller-scale programmes conceived and implemented by NGOs – including large-scale NGOs like BRAC – commonly include elements of training for adolescent girls, often within the context of microfinance or savings groups.

**Table 2: Adolescent Girls Initiative Programmes**

| Study description | Intervention design | Type of evaluation | Outcomes |
|---|---|---|---|
| **Liberia: Adolescent Girls Employment Project**<br><br>Adoho et al. (2014) | In 2009, 2,500 girls received 6 months of classroom-based training followed by 6-month placement or support phase. 2 tracks were available, one 'job skills' track focused on skills for formal employment and 'business development services', focused on micro-enterprise development. | RCT. Participants randomly selected from programme applicants. 1,191 young women started the programme. Baseline and 2 follow-up quantitative household surveys and focus groups after training completed. Follow-up 6 months after classroom training completed. | Increase in employment of 47% and in earnings by 80%<br>Positive impacts on self-confidence and levels of anxiety about circumstances and future.<br>No evidence of shift in gender norms in wider community. |
| **Jordan: Jordan New Opportunities for Women**<br><br>Groh et al. (2012) | Programme pilot 2 approaches – 1 gave 450 participants a job voucher they could present to potential employers and paid the minimum wage for 6 months if they hired her; second was employability skills training covering communication and business skills as well as team work. | Randomised experiment. Participants allocated into 3 intervention groups (300 girls) and a control group (449 girls). Quantitative baseline, midline (6 months after training or receiving vouchers) and end line (14 months after). Survey of firms that had employed graduates at midline was also completed. | Receipt of voucher led to short-term increase in employment – but no significant change still present 4 months after voucher period ends.<br>Soft skills training no overall impact on employment although slightly significant results seen outside the capital.<br>Training boosted self-confidence and mental well-being. |
| **Nepal Employment Fund**<br><br>**Chakravarty et al. (2015b)** | Intervention combines skills training and employment placement services reaching over 4,410 girls aged 16-24, as part of a wider programme that reached 40,000 people. Launched in 2009 and delivered | Quasi-experimental approach with participant and non-participant groups. Based on before and after measures of participants. Average differences between participants and | Positive impacts on employment and earning, slightly more positive for women; younger women 16–24 experienced same improvements as older women. |

| Study description | Intervention design | Type of evaluation | Outcomes |
|---|---|---|---|
| | over 3-year period. | non-participants then compared in a difference in difference strategy. | Training in electronics, beautician services and tailoring most effective. No consistent impacts on empowerment or reproductive health. |
| **Haiti Adolescent Girls Initiative** **Rodella et al. (2015)** | Implemented between 2012 and 2014 reaching 1009 girls aged 17–20. Combined training in non-traditional technical skills and 'soft skills', assistance with job placement and small stipend to cover costs of attending training. Results were measured 3 months after completion. Attempts to follow up after this with an SMS survey yielded limited results. | RCT with participants randomly allocated to training or control cohorts. Qualitative studies also carried out by programme to look in more depth at girls' experiences of the programme. | At 3 months no increase in earnings or number engaged in income-generating activities. Participants changing the type of work they undertook. Participants showed higher expectations for higher education and subsequent employment; a number had enrolled in higher education. Participants felt they had improved autonomy and decision-making. |
| **Lao PDR Supporting Talent, Entrepreneurial Potential and Success (STEPS)** **World Bank (2013a)** | Implemented in 2 rounds between 2011 and 2013. STEPS involved 1) a marketplace competition to identify and support adolescent girls who wanted to start or expand a business and that reached 400 beneficiaries; 2) career counselling offices to provide support and job placement services to university graduates. | Marketplace intervention monitored through surveys at 7 and 10 months post-training with participants as well as qualitative interviews with stakeholders. | 21 new businesses set up and 20 expanded among marketplace participants. Female-led businesses still had higher failure rate than male-led businesses. 140 new jobs created by business growth. Limited gender disaggregated |

| Study description | Intervention design | Type of evaluation | Outcomes |
|---|---|---|---|
| | | | results from counselling stream: half of students registered with career counselling service at National University of Laos were female and one third registered at Pakpasak Technical College. |
| Rwanda<br><br>Botea et al. (2015) | Delivered to 2,000 adolescent girls in 3 cohorts between 2012 and 2014. Provided skills development and entrepreneurial support. Second component to support girls into higher education is not included in the evaluation. | Non-experimental – follows individual participants before, during and after intervention using a combination of qualitative and quantitative methods. Sample of 160 girls. | Increase in non-farm employment. Proportion of girls reporting businesses, wage employment or internship increased from 50% to 70%. Amounts earned in income-generating activities increased significantly. Report larger social networks and greater self-confidence. |

Learning from the Adolescent Girls Initiative suggests a number of ways in which active labour market programmes can be adapted for the strongest impacts. Several evaluations stress the importance of flexibility and childcare. For example, in Liberia participants could choose a class in the morning or afternoon and were provided with free childcare (Adoho et al, 2014). Classes in Haiti took place in the morning so participants could travel more safely, and gender training was provided in the technical training centres to prevent and identify abuse (Rodella et al., 2015). Both these programmes had a very low dropout rate.

The importance of the development of 'soft skills' to improve employment outcomes comes across clearly in these studies. Adoho et al. (2014) report that in Liberia the programme offered a range of additional support and flexibility – including assistance to open savings accounts in local banks, and small teams formed with a mentor to provide support and foster networks. All this contributed to a retention rate of 90%. It is

important to note that the programme was not targeted to the most vulnerable segments of society. Based on comparisons with national data, participants were more educated, more literate and more likely to be engaged in income-generating activity and owned more assets than the average Liberia woman their age.

There are also significant impacts on the quality of work available and earnings. The programmes show matching training closely to the local labour market is vital for success. The programme in Haiti deliberately provided training in non-traditional roles to participants, after consultation with stakeholders on existing employment opportunities in Haiti's labour market. Three months after the intervention, participants seemed to be transitioning towards higher-skilled jobs in a very difficult labour market (Rodella et al., 2015).

Botea et al. (2015) found the likelihood of girls applying the trade they had been trained in varied significantly. Between 38% and 53% of culinary, food processing and agri-business trainees were doing work connected to their training at endline. However, although 61% of arts and crafts trainees had at least one non-farm income-generating activity, only 12% among them said they were using their trade. Participants suggested the programme needed to expand the range of trade training on offer in order to more closely match the labour market situation. However, average earnings and business profits doubled over the course of the project and savings and livestock ownership also increased. In Liberia, Adoho et al. (2014) report an increase in earnings of 80% and in employment of 45%.

The evaluation of the programme in Nepal stresses that it is important that skills programmes educate girls and their families about the returns of work in non-traditional trades and growing higher-paying fields, rather than focusing on training in areas like hairdressing or tailoring (Chakravarty et al., 2015b).

The evaluations show generally positive impacts on girls' self-confidence and sense of inclusion, and some impacts around changing family and community attitudes to girls' work. Adoho et al. (2014) show that in Liberia participants grew in self-confidence and had reduced anxiety about their circumstances and the future. Rodella et al. (2015) found a range of empowerment outcomes, including an increased sense of autonomy, self-confidence, self -esteem and sense of increased standing within the family. Botea et al. (2015) found girl participants had increased their social networks and plans for the future had become a

more common topic of conversation, suggesting increases in self-esteem and self-confidence.

At a community level, Adoho et al. (2014) found some evidence that linked the programme to shifting gender norms. The household survey showed no change in attitudes towards age of marriage but there was some change in perceptions of who should be responsible for household tasks, at 0.2 standard deviations. Rodella et al. (2015) found parents who had been doubtful about their girl children working outside the home were more supportive on seeing them graduate and start internships. Botea et al. (2015) also found an increase in family and community support: at follow-up, respondents who said they had someone to borrow money from in an emergency had risen from 61% to 72%, and those reporting they had a place to meet female friends from 67% to 79%.

However, the study of the programme in Nepal found no impact on empowerment. The authors stress that programme designers need to consider specialised outreach strategies to reach adolescent girls and recruit them into skills training, which are aware of the restrictions on mobility many adolescent girls experience. They suggest a recruitment strategy that engages communities and families could lead to more successful outcomes overall (Chakravarty et al., 2015b).

## 3.4 Conclusions

The largest single body of literature in this study concerns the impact of political reservations for women. Overall, these studies find that political reservations have increased women's descriptive representation (the number of women in elected governance institutions). There is some evidence that this increased representation has contributed to shifts about the acceptability of women in public life, and one much-quoted study from India that suggests a shift in parental aspirations for girls, and girls' own aspirations. There is also some evidence that women's greater political representation has been associated with investments in public services and with improved health of young children. However, this increased representation has not been straightforward or uncontroversial and several studies suggest that women's influence is often confined to policy on issues associated with women, mothers and social services. Furthermore, in some contexts, particularly where social relations are hierarchical, women are under strong pressure to follow the interests of higher castes, men or their political parties.

There is also a large body of literature on measures to promote girls' school attendance and to, a lesser extent, to combat gender-discriminatory practices and curricula that undermine girls' learning. Many strategies (such as financial support and infrastructural improvements) are well-rehearsed in rigorous reviews and this report does not discuss them in detail – in brief, these reviews find financial supportive effective at improving enrolment, though impacts on learning are less clear. Increasing the accessibility of schools has well-recognised positive impacts on enrolment and attendance, though the impacts of other improvements in infrastructure (e.g. improved sanitation) are less clear. Other strategies to combat gender discrimination have mostly been implemented through small scale initiatives. There is some evidence that mainstreaming gender-sensitive teaching and curricula can improve girls' learning outcomes and some evidence of large-scale social mobilisation campaigns contributing to changing attitudes and practices related to girls' schooling.

We found surprisingly little evidence of the use of anti-discrimination laws to combat gender discrimination in employment or within workplaces, and limited evidence concerning the impact of other work-related legislation of relevance to women, such as laws concerning maternity rights or the rights of domestic workers. Nor did we find evidence of employment quotas or explicitly pro-women hiring policies. The main area of evidence concerning affirmative action for women in labour markets relates to relatively large scale skills training for young women and adolescent girls. Evaluations of these training programmes show broadly positive impacts on young women and adolescent girls' employability skills and employment outcomes and in some, also increased self-confidence. (Many also show greater impacts on young women than young men. However, the employment impacts vary between programmes and may be dependent on a positive macroeconomic context.

# 4    Children

**Key Findings**

This section focuses on positive action to redress educational inequalities by promoting marginalised groups' access to education.

Programmes to increase the accessibility and quality of primary education have had positive effects on marginalised groups (children in rural areas, indigenous children), though some studies suggest that the poorest are still left behind.

Alternative basic education programmes typically target specific marginalised groups – including very poor children, child workers, pastoralists and children in isolated rural areas. Reviews of large-scale alternative provision in Colombia, Bangladesh, Egypt, Ghana and India find that disadvantaged students are more likely to complete primary school and meet performance standards than in mainstream schools.

Within both alternative and mainstream schooling, focused attention to combating discrimination is essential to achieve good outcomes for all groups of children. Where teachers hold positive attitudes about members of marginalised groups, their teaching is more responsive to these groups' specific needs.

Teachers need to be sensitised to multiple and intersecting forms of discrimination. For example, BRAC schools in Bangladesh have successfully combated gender discrimination but ethnic minority children still achieve less well. Girls' attendance rates continue to be lower than boys in many alternative schools systems, reflecting households' demands for their labour.

Given the emphases of our review (political participation, labour markets and education), it is unsuprising that the vast majority of evidence concerning children relates to education. In this section, we therefore discuss only evidence related to education. Very few studies of the impact of anti-discrimination measures in the political arena and none in the field of labour markets trace their impact through to the next generation. As noted above, there is some indication that political reservations for women in India may have contributed to safer birth practices and better health outcomes for children, but these conclusions are based on a small number of studies.

## 4.1 Education

Discussing affirmative action in the field of education in India, Higham and Shah (2011) identify three key approaches to reducing discrimination: *indirect inclusion*, where disadvantaged groups derive most benefit from a mainstream policy without being explicitly differentiated; *positive action*, where designated groups receive special encouragement without other groups being inherently disadvantaged; and *positive discrimination*, where selection preferences are applied so individuals from targeted groups take the place of others who would qualify on merit alone. The bulk of the evidence discussed in this section relates to positive action. We also outline some evidence concerning indirect inclusion, but, as discussed in Section 1, this was not the focus of the study and we did not systematically look for material on this approach. Evidence of positive discrimination in education (mostly higher education) is discussed in the sections on women and girls, marginalised racial and ethnic groups, people with disabilities and marginalised castes.

Two key macro ways in which governments have pursued Education for All (EFA) agendas (which dovetailed with the MDGs) and sought to reduce inequalities in access to education have been through programmes that increase the accessibility of schools, both physically and financially, and programmes that enhance the quality and/or relevance of education, aiming to make it more attractive to groups who are currently underrepresented

### 4.1.1 Broad school accessibility and quality enhancement programmes

The studies located for this review provide limited insights into programmes that aim to universalise primary or secondary education through extending educational opportunities to marginalised groups. In part, this is because an assessment of the impact of broad poverty reduction and social development policies on marginalised groups was outside its scope and would have required a differently targeted search. Nonetheless, we summarise insights on broad educational inclusion and exclusion that emerged from our search process. Lazlo's (2008) review of insights from natural and randomised experiments in education finds infrastructural improvements (increasing the supply of schools or electricity) have had positive impacts on enrolment for poor rural

children. The examples from Bangladesh and Vietnam in this review suggest roughly similar increases in enrolment among boys and girls.

Paqueo and Lopez (2003) examine the impacts of the Programa para Abatir el Rezago Educativo, implemented in four states of Mexico between 1992 and 1997, which aimed to improve the availability and quality of primary education through books, didactic materials, training of teachers, school infrastructure and distance education technologies, and through institutional strengthening of the primary education sector. They found that overall these interventions had substantial positive effects on the learning achievement of children in indigenous and rural schools in poor areas, but that greater attention needed to be paid to the poorest of the disadvantaged children. Such support might involve measures addressing financial barriers to access or catch-up clubs or extra support for children who are lagging behind.

They also found negative effects in urban areas, though they hypothesised that this might reflect a poorly formed control group or the fact that urban schools entered the programme later and so had less time to embed changes before the evaluation data were collected. Sayed et al (2007) also report on post-apartheid efforts in South Africa to redress race- and class-based inequalities in access to and quality of education, and find that limited funding and a drive to maintain standards have undermined inclusive policies – insights from their study are discussed further in Section 6.2.

## 4.1.2 Non-formal education/ alternative basic education

Alternative basic education programmes take a variety of institutional forms: some are run by mainstream public education systems, others are run by non-governmental organisations (NGOs) but provide bridges to or curricula accredited with mainstream curricula; still others operate entirely outside the mainstream system. Non-formal or alternative basic education programmes typically respond to three main sets of circumstances, all of which are linked to social exclusion and discrimination: economic deprivation that renders mainstream schooling unaffordable or clashes with children's essential livelihood activities; socio-cultural barriers (including family or community discrimination against particular groups of children); and school-level factors (e.g. poor-quality teaching or teacher absenteeism in mainstream schooling) (Shanker et al., 2015). Marginalised and socially excluded groups of children are often either the explicit targets of or disproportionately

represented in such alternative education programmes, which variously target children living in isolated rural areas, children whose family's mobile livelihood is not always compatible with conventional schooling (e.g. seasonal work, mobile pastoralism), working children who are supporting themselves or their households economically and/or children whose schooling is deprioritised, such as girls in some cultures and households. These programmes encompass a variety of institutional arrangements: some are run by and fully integrated with mainstream public education; others offer bridges to mainstream education and national testing and certification; others deliberately operate at arms' length from mainstream provision.

Our search process did not find any examples of rigorous or systematic reviews on non-formal or alternative education, nor did it lead to many individual evaluations of non-formal or alternative education programmes other than for pastoralist children (discussed in Section 4.2.3 below).[13] We did, however, find several overview studies. We therefore draw selectively on these and on a few evaluations of well-known large-scale programmes we accessed through targeted searching.

Farrell and Hartwell's (2008) review highlights the achievements of four large-scale alternative education programmes that have been effective in expanding enrolment and attendance and enhancing learning outcomes among very poor children: Escuela Nueva in Colombia, BRAC in Bangladesh, Community Schools in Egypt and School for Life in Ghana. In all four, disadvantaged students are more likely to complete primary school and meet performance standards than in mainstream schools (or, in the case of Colombia, schools not using the Escuela Nueva approach). Similarly, the UN Children's Fund (UNICEF) (2009b) cites data showing the large-scale achievements of the National Institute for Open Schooling in India in providing effective education to out-of-school children.

Beyond some disaggregation by gender, disaggregation of data for specific social groups is rare in these overviews. One exception is Nath's (2012) analysis of the extent to which different groups of students (rural, urban, girls, boys, Bengali, ethnic minority) in BRAC primary schools in Bangladesh are achieving a set of key competencies. Drawing on test data, Nath finds BRAC students outperform those in government schools, with girls in particular doing better (perhaps reflecting the

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[13] Consistent with our experience, a systematic review of the effectiveness of non-formal education for street and working youth found no relevant studies of sufficient quality to include (Shephard, 2014).

emphasis on gender equality in BRAC schools) and no gender differences in achievement among BRAC students. Nath's analysis also finds ethnic minority students as a cohort are achieving fewer competencies than Bengali students.

### 4.1.3 Focused programmes to support pastoralist children's access to education.

As children of groups who are disproportionately likely to live in remote rural areas, to be working (caring for family herds or performing other essential livelihood activities) and often to be members of ethnic minorities, pastoralist children often benefit from broader reforms that increase the accessibility and flexibility of education and enhance learning opportunities through language-of-education reforms. However, even where reforms or alternative basic education programmes are geographically targeted, the impact on pastoralist children has rarely been specifically assessed.

As a result, our review found limited rigorous evidence examining the impact of programmes to support pastoralist children's access to and attainment in education. The evidence that exists relates mostly to small-scale alternative basic education programmes, and evaluations have been limited. This is  in part because, even where state-funded and state-implemented, the main metric is numbers of children progressing into formal or 'standardised' schooling, and data on children's progress and attainment are often limited. The relatively small body of rigorous evaluation also reflects ongoing stigma and discrimination against pastoralism as a way of life – a legacy of development strategies that aimed to sedentarise and 'modernise' pastoralists communities – which often intersects with prejudice and discrimination against particular ethnic groups and means effective programmes to reach children in these groups have not been prioritised. For example, Dyer (2015) observes that in India greater attention has been paid to education for the children of seasonal labour migrants than for mobile pastoralist children.

Several reviews (e.g. Dyer, 2015;  Krätli and Dyer, 2009) summarise the impacts of mostly pilot or short-lived initiatives in encouraging greater access to relevant and good-quality education for pastoralist children. These reviews typically find pastoralist families are interested in good-quality and relevant school education, so long as it does not require families to abandon one of the few viable livelihood sources in dryland areas (pastoral production) and children continue to acquire the practical

skills of animal husbandry they will need if they are not able to use education as a route to employment. Typically, flexible schooling meets the needs of semi-mobile pastoralists rather than extremely mobile households (Dyer, 2015).

Carr-Hill et al. (2005), Downie (2011), Dyer (2015) and Krätli and Dyer (2009) emphasise the importance of flexibility in school timing, locations and relevant curricula. To date, these attributes have been more common in non-formal (and often not state-provided) education than in the formal education system, though there are recent examples from Ethiopia, India, Uganda and other places of state-led programmes or state–NGO collaborations. For example, the Alternative Basic Education for Karamoja programme in Uganda, a state–NGO collaboration, is a much-cited model of primary education that is relevant to pastoralist children, and has high rates of progression to formal secondary education. However, pressures on children's time mean attendance rates are typically around 70%, with children missing school for domestic chores and animal husbandry; the quality is also variable, with some problems of undertrained facilitators (UNICEF, 2009a).

Reviews such as Dyer (2015) highlight the potential of open and distance learning. However, Dyer concludes that 'despite [its] unrivalled capacity […] to provide the elusive fit between mobile livelihood and formalised education provision, it has yet to be trialled for children and at scale. Until this has been done, providers will be put off by high start-up costs[14] which are incurred before it can move to an economy of scale.' (p26). This points to an issue under-explored in the studies reviewed: the costs of alternative educational provision. This should not be assumed to be higher than in the mainstream formal sector, but requires further exploration in different contexts.


## 4.2 Conclusions

An overwhelming conclusion from this material is that – beyond measures within education systems - we simply do not have enough evidence to understand how affirmative action measures affect children. While there is some positive evidence concerning the impacts of both measures to enhance the quality and accessibility of mainstream schooling, and of alternative basic education, the bulk of the evidence

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[14] These may include for the costs of training teachers to be able to support open and distance learning, a very different model to that of classroom-based education.

concerns efforts to enhance the position of specific marginalised groups, and is therefore discussed in the relevant sections. This evidence shows some success but also indicates the need for greater resourcing of pedagogical and attitude change.

Other than attempts to change discriminatory attitudes related to disability (discussed in 6.2), we found no studies considering the impact of teacher training or sensitisation in positive attitudes towards marginalised groups or in non-discriminatory practice. Where teachers hold positive attitudes towards members of marginalised groups, such as girls, ethnic minorities and children who are in the wrong class for their age, their practice is more likely to be responsive to children from these groups, as Westbrook et al. (2013) show, drawing on six studies in Ghana, India, Kenya and Uganda.

Another key gap in the literature examined is a consideration of how improving the quality of teaching can enhance the enrolment and attainment of children from discriminated against groups. For example, Westbrook et al.'s (2013) rigorous review of curricula, pedagogical strategies and teacher education approaches in LMICs comments that studies rarely discussed children's socioeconomic or demographic background and how this might influence the effectiveness of different approaches to teaching and learning.

# 5. Young People

**Key findings**

The Jovenes programmes in various Latin American countries, which combine demand-led vocational training and 'soft' skills classes, and provide financial support for trainees, have generally enhanced participants' employability and wages. There is some evidence that the impact on young women has been greater than for young men. The success of these programmes reflects a broadly positive economic context with growing overall employment opportunities.

Youth training schemes without a specific focus on addressing marginalization can end up reflecting social inequalities and being captured by more advantaged groups, as in South Africa where training for higher level managerial jobs was – in the 1990s – disproportionately captured by Whites.

Our study found no evidence of campaigns to challenge age discrimination in labour markets, such as challenges to lower minimum wages for young people or discrimination based on negative stereotypes concerning certain groups (e.g. young men from marginalized ethnic groups).

We found one overview study of affirmative action for young people which showed that at least 6 LMICs have youth reservations in national and local governance, but did not assess their impact. It also highlights other routes to increasing young people's political representation: young people's involvement in political parties, either as full members or via youth wings, and proportional representation.

The evidence discussed in this section relates almost exclusively to labour markets. Policies and programmes aiming to reduce discrimination in young people's access to post-school education (other than vocational training) are examined in the following sections: women and girls; people with disabilities; marginalised ethnic and racial groups; marginalised castes. We therefore do not have a sub-section on young people's access to education as it would simply duplicate material elsewhere. The section on political participation is also very thin, and highlights such evidence as we have been able to find of ongoing initiatives. We found no evaluations

or assessments of the effectiveness of these measures, which indicates that this is an important knowledge gap.

## 5.1 Political participation

We found one overview of the existence of political reservations for young people. UNDP (2013) lists the following youth reservations in low and middle income countries:

**Uganda – 5 seats reserved for youth representatives in Parliament**

**Kenya – 12 seats reserved for political parties to nominate representatives of 'special interest groups, such as youth and people with disabilities, to the National Assembly**

**Rwanda's Youth Council elects 2 members to the Chamber of Deputies**

**Tunisia requires each party list to include 1 member below 30 years**

**The Philippines also stipulates that party lists must include one youth member**

**In Peru 10% of local government representatives must be young people**

We were not able to find any studies assessing the impacts of reservations for youth. UNDP (2013) also suggests that civil society mobilization around lowering the age at which a person may stand for election has helped increase the number of young people elected to parliament in Turkey and Egypt. UNDP (2013) also suggests, that as for women, proportional representation and party lists may favour youth representatives, in that voters disinclined to favour young candidates can be assured that they are also voting for more experienced candidates. However, they provide no empirical evidence to support this.

UNDP (2013) also highlights the role of party youth wings as a route towards political representation for young people. - Where young people have entered politics either through party youth wings or through independently being selected as candidates, there is some evidence that they are more likely to promote party or personal agendas (UNDP, 2013; Van Gyimpo, 2015) than championing youth concerns, an issue

raised in the previous section in relation to women's political representation.

In addition to this study, our searches found a few assessments of small-scale or ad hoc initiatives such as youth parliaments or one-off consultative processes aimed at amplifying young people's voice in relation to policy. These fell outside the inclusion criteria for this study.

## 5.2 Reducing youth marginalization in labour markets

In 2011, ILO estimated that 12.6% of youth in the global labour force were unemployed—about 74.6 million people (see World Bank, 2013b). This section considers a set of programmes designed to equip excluded groups of young people with the skills they need to enter the labour market or run their own business. Evaluations of these programmes have made use of that use experimental methods to create conditions where outcomes can be measured in isolation. In Latin America, there is a strong body of evidence based on a series of randomised trials conducted in the 2000s. However, we were able to locate only one study (Attanasio et al., 2015) that looked at the long-term effects of such programmes. Table 3 gives an overview of the evaluations that are covered in this section.

**Table 3: Programmes with impact evaluations considered in this section**

| Study description | Intervention design | Type of evaluation | Outcomes |
|---|---|---|---|
| **Colombia: Jóvenes en Acción**<br><br>**Attanasio (2008, 2011, 2015)** | Between 2001 and 2005 provided 3 months of classroom training and 3 months of 'on-the-job' training to young people aged 18–25 in lowest socioeconomic groups. Reached 80,000 people. | RCT run in 2005 with last cohort to receive the programme. Control group made up of individuals who had applied for training and were qualified to receive it but were not selected. | Women offered training earn 19.6% more and have higher probability of paid employment than those not. Men offered training earn around 8% more. Positive impacts sustained over time. |
| **Dominican Republic: Juventud y Empleo (JE)**<br><br>**Card et al. (2011), Ibarraran et al. (2012)** | Implemented between 2001 and 2006 focused on low-income youths with less than secondary education. Classroom-based basic skills training and vocational training customised to needs of local employers – and then 2-month internship period. | Randomised trial – there was no follow up of programme dropouts – which means the follow-up survey was administered only to a subset of the original control and treatment groups. | No significant impact on likelihood of being employed. Increase in monthly earnings of 10%. |
| **Panama: ProCaJoven**<br><br>**Ibarraran and Rosas Shady (2006)** | Two modalities: classroom training and internships for low-income youths and classroom training with a longer internship for youths looking for their first job. | Natural experiment – control groups from populations where programme had been set up but not funded. Baseline constructed from programme data. | No significant impact on overall employment rates. Significant impact on women's employment and earnings – particularly in Panama City. |

Job training programmes have been extensively evaluated in OECD countries, often using randomised trials (Betcherman et al., 2007; Card et al., 2011). A cluster of programmes on training excluded or disadvantaged youth has developed in Latin America and the Caribbean

since the 1990s.[15] Puerto's (2007b) inventory of programmes that aim to support young workers globally found that 68 of the 289 interventions located globally were in this region, the largest number after that in the OECD. The majority (56%) was purely skills training programmes for young people; 32% took a more comprehensive approach, for example combining classroom and on-the-job training with wage subsidies and public works or classroom and on-the-job training with paid work experience and job search assistance. As indicated in Table 3, findings are mixed. Programmes that took place in the 1990s are more likely to have been evaluated: only one of the 45 created between 2000 and 2005 had undergone an impact evaluation with a comparison group. There is also a cluster of youth employment programmes funded by the World Bank and with commissioned evaluations where only concept notes or baseline reports are currently available. These may provide a useful resource in the future[16].

Recent work to bring together evidence on the impact of skills training includes Rankin et al.'s (2015) gap map on transferable skills programming for youth in LMICs. This contains 90 completed impact evaluations of both large- and small-scale programmes. The research did not have a specific focus on excluded or marginalised groups of youth but the authors did consider programmes that targeted only girls or only boys, included gender-specific analysis and searched for programmes targeted at out-of-school youth. The majority of the impact evaluations in the review deal with NGO-led projects. The gap map also found a cluster of studies that assessed training programme outcomes around individual knowledge, beliefs and attitudes rather than labour market outcomes. A number of ongoing projects identified are potentially relevant in any update to this study: *Apprenticeship training and entrepreneurial support in Malawi*,[17] *youth empowerment private sector internships in Kenya*[18] and also in Kenya a micro franchising programme for girls.[19]

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[15] For an overview of the available evaluations from the 1990s and impacts of the programmes, see Betcherman et al. (2007), Ibarraran and Rosas Shady (2008) and Vezza (2013).

[16] Details of the programme can be found at www.poverty-action.org/study/estimating-impacts-microfranchising-young-women-nairobi

[17] http://www.youth-employment-inventory.org/inventory/view/3459/ Malawi

[18] http://www.youth-employment-inventory.org/inventory/view/950/ for Kenya private sector

[19] http://www.youth-employment-inventory.org/inventory/view/3457/ - Kenya microfranchising

**Box 2: The Jóvenes programmes**

The Jóvenes programmes have operated in Latin America and the Caribbean since 1991, initially in Chile and then subsequently Venezuela, Argentina, Paraguay, Peru, Colombia, Panama and the Dominican Republic. The programmes have been financed by national governments, with some assistance from the Inter-American Development Bank and the World Bank, and form the model for many of the training programmes operating currently in Latin America. Programme participants are poor youth with low levels of education. Some programmes have targeted women.

The Jóvenes approach combines classroom learning with work experience, life skills education, job search information and counselling. Participant youth and companies both receive financial incentives – wage subsidies or stipends – to guarantee participation. The training combines 'soft skills' and vocational training that is demand-led in order to meet the needs of employers.

Evaluations have used both experimental and quasi-experimental designs and generally show improved probability of employment and earnings on graduation compared with a control group.

Source: Adapted from Puerto (2007a).

Evaluations for programmes that took place post-2000 are available for Colombia, the Dominican Republic and Panama. Attanasio et al. (2008, 2011, 2015) and Card et al. (2011) use randomised trials to discuss the impact of training for low-income youth in Colombia and the Dominican Republic, respectively. The programmes offer three months of classroom training followed by private sector workplace internships (three months in Colombia and two months in the Dominican Republic). In Panama, ProCaJoven was a similar programme evaluated through a natural experiment, combining classroom training with a 172-hour internship; for first-time job seekers a longer job placement was provided. All participants received a transfer of $255.

Two of the programmes show stronger impacts on young women than young men. Attanasio et al.'s (2008, 2011) analysis finds the programme in Colombia had much larger impacts for women than men, with positive impacts on wages, number of hours worked and probability of employment. For men, there is a positive significant impact on the likelihood of having a formal employment contract (6%). For both men and women, the programme has positive impacts on wages in formal employment – an increase of 23% for men and 33% for women – though men who remained in self-employment experienced a drop in earnings compared with the comparison group following participation. The Colombian programme is unusual in that long-term follow-up data are available. Attanasio et al. (2015) use administrative data collected between 2008 and 20015 and find a significant positive effect on the likelihood of employment in the formal sector and that the stronger impact for women continued. In Panama, ProCaJoven showed no significant impact for men but an increase in wages and employment among women – particularly those living in Panama City (Ibarraran and Rosas Shady, 2006).

Card et al. (2011) report on the JE programme in the Dominican Republic, which had a significant dropout rate and does not include gender-disaggregated data. At 10–14 months after completing the training there was no impact shown on employment and a positive impact of around 10% on wages. Ibarraran et al. (2012) use data from a cohort that received training from the JE programme in 2008 and also find that overall there was no significant impact on employment – although there was a small positive impact on the likelihood of men having formal employment contracts. This evaluation also measures the impact of the programme on risky behaviour and pregnancy and finds the programme has had a positive impact in terms of youth perceptions about their current situation and aspirations for the future, with stronger impacts for women and younger participants.

There is limited discussion of the implementation of these programmes. Card et al. (2011) speculate that the design of JE meant few employers were using the internships to recruit workers: as the programme fully subsidised interns' wage costs, they had a strong incentive to fill the slots with trainees rather than take on full-time workers. The iteration of the programme seems to have addressed some of these concerns by working more closely with employers in order to provide training for real vacancies and placing more emphasis on 'job readiness skills' (Ibarraran et al., 2012). Ibarraran and Rosas Shady (2006) discuss difficulties in implementing the programme, with spending at

30% of allocated resources after two years of operation and reaching only 3,700 beneficiaries. Political and institutional failures are implicated here but there is no further discussion of these factors or how they could be resolved.

There is less evidence around programmes designed by governments to fill skills gaps in the economy. India has developed private–public partnerships to deliver short-term courses and apprenticeships to ensure the required skills are available as the economy develops. However, the corresponding Action Programme for the Unorganised Sector, proposed in 2004, has not been fully implemented, and access to training remains difficult for youth who lack education and foundational skills, who cannot take time off from work or whose mobility is constrained by gender or caste (UNESCO, 2012). In South Africa, a national skills programme has been in existence since 2001. Aims include meeting the needs of the global economy and undoing the inequality of apartheid, with a training subsidy for employers (Badroodien, 2003). Although no evaluation data are available on the impact of the programme, national surveys and programme participation data reveal that many more Whites receive training in high skills occupations. In 2000, about 71% of those trained in the professional/managerial category were White; 85% of those trained in lower-level occupations were Black (Kraak et al., 2000, in Badroodien, 2003).

As the 2012 EFA Global Monitoring Report notes, there is a lack of skills training programmes targeted at young people working in the informal sector (UNESCO, 2012). While some of the Latin American programmes discussed above measure the formality of workers' contracts and self-employed incomes, they aim to build skills towards formal sector employment. One review showed most countries did not have a national skills development strategy addressing needs in the urban informal sector or the specific challenges facing rural young women or women from ethnic minorities, who are particularly disadvantaged (Engel, 2012, in UNESCO, 2012). Microcredit and micro enterprise fell outside the scope of this study – although there is potential for the more comprehensive inclusion of skills training in these activities where they are targeted towards excluded youth. As one review noted, the successful Jóvenes programmes rely heavily on a positive macroeconomic context, particularly in terms of job creation (Ibarraran and Rosas Shady, 2009). In the absence of robust private employment growth, job skills development programmes have generally performed poorly. We were not able to locate a body of political economy analysis that explores these relationships in more detail.

## 5.3 Conclusions

Evidence on policies to combat discrimination against young people as a socially marginalised group, rather than as members of other socially marginalised groups, is limited. We were surprised to find no evidence of legal efforts or campaigns to challenge age discrimination in labour markets, such as challenges to lower minimum wages for young people or discrimination based on negative perceptions of certain groups of young people (e.g. young men from marginalised ethnic or racial groups or from slums with a 'bad reputation'). Given that there are nascent efforts to institutionalize young people's political representation, the lack of assessment of these initiatives indicates an important evidence gap.

All the evidence on young people and labour markets found for this review concentrated on jobs training programmes for young people in Latin America. The evaluations reviewed suggest that these have had a positive effect on participants' subsequent access to employment and wage levels, indicating that they hold promise as means of tackling both poverty and social exclusion. It must be noted, however, that these programmes took place at a time of economic growth and similar programmes in less auspicious economic contexts have been markedly less successful.

# 6. People with Disabilities

**Key findings**

Only one study examined affirmative action to promote disabled people's political representation - in local councils in Uganda. Although this has helped increase the numbers of disabled people in local and national governance, interviewees considered that more focused financial support and other provisions were needed in addition to increased political representation.

Although many countries have declared inclusive education policies over the past 20 years, there is very little direct evidence assessing their impact. Most assessments focus on the barriers to implementation, particularly related to finances and to teacher training and attitudes, rather than achievements.

Studies of teachers' attitudes find they are considerably more positive to inclusion of children with mobility difficulties than children with intellectual disabilities. Most teachers feel they are under-trained and resourced to support children with moderate or severe difficulties.

Studies of affirmative action in higher education for people with disabilities in Africa indicate fairly limited efforts to change institutions: individual universities made some adjustments and there were no concerted efforts to change discriminatory attitudes among staff or students. While quotas in Uganda have increased the numbers of disabled students in higher education, the absence of financial support limits the effectiveness of this policy.

The few studies of labour market quotas for disabled people in LMICs (from East Africa, South Africa and China) suggest that they are generally under-filled, in part because employers perceive employing disabled people as creating financial and logistical burdens. We found no evaluations of efforts to promote inclusive attitudes or practices in the workplace.

## 6.1 Political representation

There is very little research on affirmative action for people with disabilities to enter political spaces. It is a clear gap where further

research is needed. There is a literature around the rights of people with disabilities and the need to create or enforce anti-discrimination legislation, but there is little evidence on where or how this has been done in relation to political participation. The one exception where we have some limited evidence is on Uganda.

Zero Project (2015) explores the application of anti-discrimination legislation in relation to disability. It highlights the example of Uganda, which since 1995 has had reservations in local and national government for those with disabilities. These are for one man and one woman in each county and by 2006 there were 47,000 such representatives. Katsui and Kumpuvuori (2008)'s qualitative study explores these reservations in more depth. Political reservations for people with disabilities in Uganda were created through the 1997 Local Government Act. The authors argue this Act is an interesting example of affirmative action for disempowered groups, including women, people with disabilities, youth, workers and the army. Uganda has a quota of five MPs to represent the disabled population: four MPs from four regions (Central, East, West, North) and one woman with a disability and by 2006 had seven MPs with disabilities, two of whom were elected by general ballot. They also confirm the figure of 47,000 disabled councillors in local government and that disability has become positively visible in the Ugandan political space. However, they argue from their qualitative research that disabled people find their deprivation and discrimination is not assuaged through political representation alone, given limited commitment of resources to their issues and would prefer more financial support rather than only a political response to their immediate needs.

## 6.2 Education

### 6.2.1 Primary and secondary schooling

Over the past two decades, and particularly since the 1994 UN Educational, Scientific and Cultural Organization (UNESCO) Salamanca Conference on inclusive education, a growing number of countries have declared inclusive education policies. In some countries, these constitute a broad framework for improving access to education for a range of disadvantaged groups; in others, inclusive education has been interpreted to mean inclusion of children with disabilities. Our search process found few direct assessments of the impacts of policies and

programmes in this area: the majority acknowledged the existence of a policy or programme and then presented statistics or qualitative evidence concerning disabled children's lack of access to education or examined barriers to policy implementation (e.g. Ametpee and Anastasiou, 2014 in Ghana; HRW, 2015 for South Africa).

For example, Ametepee and Anastasiou (2014) estimate only 3% of Kenya's disabled children are attending school; Hernandez (2008) and Donohue and Borman (2014) cite data that make corresponding estimates of 60% and 30% for India and South Africa.[20] Box 3 gives a summary of how – despite a positive legal and policy environment – disabled children continue to face discrimination in accessing education in South Africa. A subset of studies (Agbenyega, 2007; Ali et al., 2006; Mukhopadhyay et al., 2012; Ntombela, 2011) examines teachers' or student teachers' attitudes to inclusive education of children with disabilities. As Mukhopadhyay et al. (2012) point out, studies of teachers' attitudes are more common than impact studies in this area.

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[20] These data are likely to be inaccurate given limited identification of disabilities in many low-income settings and hiding of disabled children in some contexts.

**Box 3: South African disabled children and education – the multiple faces of discrimination**

- *Discrimination accessing education*: Schools often decide if they are willing or able to accommodate students with particular disabilities or needs. In many cases, children with intellectual disabilities, multiple disabilities and autism or foetal alcohol syndrome are particularly disadvantaged. In most cases, schools make the ultimate decision – often arbitrary and unchecked – as to who can enrol.

- *Discrimination because of a lack of reasonable accommodation in school:* Many students in mainstream schools need to overcome physical and attitudinal barriers in order to receive an education. Many students in schools for children with sensory disabilities do not have access to the same subjects as in mainstream schools, jeopardising their access to a full curriculum.

- *Discriminatory fees and expenses:* Children with disabilities who attend special schools pay school fees that children without disabilities do not, and many who attend mainstream schools are asked to pay for their own class assistants as a condition of staying in mainstream classes. Additionally, parents often pay burdensome transport and boarding costs if special schools are far from families and communities; in some cases they must also pay for special food and diapers.

- *Violence, abuse, and neglect in schools:* Students are exposed to violence and abuse in many of South Africa's schools, but children with disabilities are more vulnerable to such practices.

- *Lack of quality education:* Children with disabilities in many public schools receive low-quality education in poor learning environments. They continue to be significantly affected by a lack of teacher training and awareness about inclusive education methodologies and the diversity of disabilities, a dearth of understanding and practical training about children's needs according to their disabilities and an absence of incentives for teachers to instruct children with disabilities.

- *Lack of preparation for life after basic education:* The consequences of a lack of inclusive quality learning are particularly visible when adolescents and young adults with disabilities leave school. While a small number of children with disabilities successfully pass the secondary school certificate, or matric, many stay at home after finishing compulsory education; many lack basic life skills. Their progression into skills-based work, employment or further education is affected by the type and quality of education available in the special schools they attend.

Source: HRW (2015).

Four studies provide significant insights based on primary research into the barriers to effective implementation of inclusive education policies; most other studies also mention these. Lack of resources to support policy implementation recurs repeatedly (Ametepee and Anastasiou, 2015; Grimes et al., 2015; HRW, 2015; Mwangi, 2013; Mukhopadhyay et al., 2012),[21] raising questions as to why governments make policy commitments they are unable to finance and why international financing for education has made so little impact on disabled children's access to education. Grimes et al. (2015) suggest the lack of specific focus in the MDGs on disabled children's education may have deflected attention and resources away from this area; more broadly, Ametepee and Anastasiou comment on the vagueness of international declarations on EFA and inclusive education, which do not 'help developing countries set clear goals for educating learners with disabilities' (p.151).[22] Donohue and Borman (2014) also highlight vagueness of inclusion policies as a reason for the limited implementation of South Africa's White Paper 6 on Inclusive Education. They argue that 'progress can be made with inclusive policy in South Africa if procedures are clarified, directives are given, and the appropriate authorities assume responsibility and control of its implementation' and that 'Education White Paper 6 … was a monumental step forward in respect of the rights of people with disabilities in South Africa, but the policy will remain purely symbolic until real initiative and deliberate action are taken' (p.11).

These studies identify three key areas where resourcing has had a significant impact: pre- and in-service training of teachers, classroom support (given large class sizes) and availability of assistive devices. This has affected the extent to which teachers can expect – or are able – to tailor their teaching to different students. For example, Johnstone and Chapman (2009) in Lesotho found that:

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[21] Mukhophadhay et al. (2012) additionally highlights the findings of other studies in Botswana, Ghana and India that emphasise the way lack of resources undermines teachers' capacity to include disabled children effectively.

[22] The SDGs, which contain stronger statements on inclusivity, such as highlighted below, may prove more motivating of increased resourcing and commitment: *By 2030, ensure that all girls and boys complete free, equitable and quality primary and secondary education leading to relevant and effective learning outcomes; By 2030, eliminate gender disparities in education and ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, indigenous peoples and children in vulnerable situation; Build and upgrade education facilities that are child, disability and gender sensitive and provide safe, non-violent, inclusive and effective learning environments for all.* https://sustainabledevelopment.un.org/?menu=1300, accessed 11 December 2015.

'Most instruction of students with disabilities was not undertaken as a part of a coherent approach to teaching based on access and accommodation, but in teachers' spare time. For example, one teacher observed that, "it [teaching learners with special needs] is too much of work, because they need time. If you put them in your class, then on your spare time you take them, you give them their work." Another teacher agreed, saying "[w]e just give them the lessons in the large group. Then during our spare time we take those with disabilities alone in their group."'

Kritzer (2011) reports similar findings from China, where the Learning in the Regular Classroom movement since the early 1990s has been intended to enable disabled children's education, while simultaneously costing less than large-scale special education. Citing a study by Deng and Masset (2000), he notes that 'in some "Learning in the Regular Classroom" schools, students with disabilities have been observed sitting alone, isolated from classroom activities, or have even remained at home, despite the fact that their names are on the registration list. This unfortunately common practice has been called "drifting in the regular classroom"' (p.3).

In countries where the dominant teaching style is teacher-centred and focuses on a whole class, there are particular challenges in an inclusive education approach that involves tailoring of approaches to the needs of particular students. This is compounded by large class size, and by lack of infrastructure (e.g. sufficient classrooms) (Agbenyega, 2007; Arbeiter and Hartley, 2002; Deng and Harris, 2008; Johnstone and Chapman, 2009). Johnstone and Chapman (2009) also highlight absence of teacher incentives (such as recognition of training and competence) as another key factor undermining Lesotho's inclusive education policy.

Where a significant number of teachers trained before inclusive education reforms during a period when a medical model of disability with separate 'special' and 'mainstream' education predominated, reorienting practice towards more inclusive approaches can be challenging (Donohue and Borman, 2014). Ntombela's (2014) study of inclusive practice in three primary schools in KwaZulu-Natal, South Africa, underlines the importance of effective in-service training; in the schools Ntombela studied, a few teachers had attended inclusive education workshops but learning had not been effective or was often quickly forgotten. Without further support, teachers had struggled to implement new practices, particularly with respect to disabled children.

Many education systems have continued to pursue hybrid approaches involving both a formal commitment to inclusion and provision in special schools. A consistent finding across the studies of teachers' attitudes is that teachers in mainstream schools are generally positive about and feel competent to include learners with physical (especially mobility-related disabilities) but feel unable to support learners with deeper challenges, particularly intellectual disabilities and more profound hearing or visual difficulties. Many teachers interviewed by Johnstone and Chapman (2009), Mwangi (2013) and Ntombela (2011) felt children with disabilities of these types could be better supported outside mainstream classrooms. Children's and parents' perceptions vary, often reflecting the specific institutional context, the nature of service provision and particular children's needs and abilities. For example, some of the disabled children and their parents interviewed by Human Rights Watch (HRW) (2015) in South Africa felt special education would marginalise their children and limit their learning opportunities, while others consider it their only hope for effective education tailored to their needs. Mugo et al. (2010), drawing on evidence from Kenya, suggest boys are more likely to be sent to residential special educational institutions than girls – reflecting fears about adequate protection and in some cases greater reluctance to pay additional costs for girls.

Taken together, the studies suggest anti-discrimination legislation and inclusive policy have had rather limited impacts in terms of enhancing disabled children's access to schooling. In a review undertaken to inform the 2015 EFA Global Monitoring Report, Grimes et al. (2015) conclude that 'whilst there is evidence to indicate that international policies and treaties such as CRC, EFA and CRPD have influenced individual states to develop and implement their own disability legislation and EFA action plans, there is little evidence of educational system reform removing discriminatory barriers to the education of children with disabilities' (p.1).

## 6.2.2 Access to higher education

We located only two studies[23] that examined issues of disabled students' access to higher education in a low- or middle-income context (Morley et al.'s 2011 study of widening participation in Ghana and Tanzania and

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[23] A number of papers by different authors were produced under the auspices of Morley et al.'s study.

Kaguhangire-Barifaijo and Karyeija's 2012 study of affirmative action for disabled students in Uganda). As Section 5.2.4 discussed, disabled students often face substantial barriers to completing primary or secondary education. Indeed, as Morley and Croft (2011) put it,

'Being disabled at least doubles the chance of having never attended school [...]. Those who do start school are at increased risk of "dropping out" before completing basic education [...]. Exclusion from basic education means that there has been a small pool of disabled students qualified to enter HE [higher education]. Additionally, access for disabled students to HE or particular programmes can be formally blocked [...] or informally advised against [...]' (p.384).

This is particularly the case for female students with disabilities: Mwaipopo et al. (2011) present data from Tanzania that show a substantial drop-off in disabled students' participation after Form 4 (i.e. not completing the final two years of secondary education that are essential for access to higher education), with particularly marked drop-off among girls.[24] Morley et al.'s study, and in particular papers by Mwaipopo et al. (2011) and Morley and Croft (2011), indicates the absence of formal policies for promoting or supporting disabled students' access to higher education. They indicate individual universities making some adjustments (e.g. in terms of locating physically disabled students' accommodation on the ground floor) and the importance of informal social support from peers. None of the universities in their study had instituted attitude change campaigns and as a result some disabled students were undermined by negative attitudes on the part of staff or other students. However, others reported that their academic success had also helped change attitudes.

In 2005, the Ugandan government reserved 64 slots for disabled students among the 4,000 students supported annually with public funding (0.64% of the total number of supported students) (Kaguhangire-Barifaijo and Karyeija, 2012). Disabled students are admitted with the minimum requirement, while having to study with other students with considerably higher grades. Furthermore, they are often placed where they are perceived to be able to cope but not necessarily where they fit and on courses they find interesting. Thus, the

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[24] In 2010, there were 880 disabled students in Form 4 in Tanzanian secondary schools, 41% girls and 59% boys. In Form 5, this decreases to five girls and 17 boys; in Form 6, it is nine girls and 27 boys. Girls thus compose around a quarter of the very small number of disabled students in upper-secondary education (Mwaipopo et al, 2011).

impact on disabled students' higher education opportunities remains limited.

## 6.3 Affirmative action for people with disabilities in labour markets

There are many policy options designed to increase labour force participation rates of people living with disabilities, for example quotas, vocational training and work placements, measures to support self-employment and campaigns to change attitudes. Data on employment rates of people with disabilities are collected in ILO national surveys and show significant variation across LMICs, from a high of a reported 81% in Malawi to low of 30% in South Africa – although it is important to note that those not looking for work would not appear in these figures and a high proportion of people with disabilities work in the informal sector, which is also not included. For example, in Cambodia, an estimated six times as many people with disabilitiesare self-employed as are employed; in China, the official data state that 75,000 people with disabilities start a business every year with government support, although this is a very small proportion of the disabled population (ILO, 2003). Despite this, we did not find any evidence that met the review criteria that dealt with policies to support disabled people to start and run their own businesses.

This section is based on a total of six research studies: four impact studies, one of which conducted research based on secondary analysis of official data (Dube, 2005), and two qualitative studies, Aldersey (2010), which focuses on knowledge, and Wan Abdullah (2013), which focuses on disabled persons' experiences of employment in Malaysia. The majority of the remaining papers are based on official data around employment numbers rather than being impact and evaluation studies.

### 6.3.1 Quotas

None of the studies located during this research demonstrated a causal link between increased quota legislation and increased employment of people with disabilities. In some cases, employment figures are disputed or unreliable (ILO, 2003; Kett, 2012. The World Disability Report confirms that no evaluations of the impact of quotas have been conducted (WHO , 2011).

Two studies include a discussion of quotas in African contexts: Dube (2005) on South Africa and Aldersey (2010) on Tanzania. In both cases, the authors determine impact through a correlation of official employment data with the quota. Both studies show the rate of employment of people with disabilities has not reached that mandated by the quota. For example, in South Africa, the quotas state that 2% of employees in the public and private sectors should be disabled – a target that has not yet been reached. Although recent national statistics on disabled people's labour force participation, not broken down by sector or quality of employment, show broadly similar levels of employment and unemployment for people with and without disabilities, more people with disabilities are considered economically inactive – and almost a third of the working-age population (27.5%) were unemployed.

The evidence base is similarly limited for other contexts. We located some discussion of China's policy but nothing from other Asian countries or Latin America.[25] China has a three-pronged approach to disability employment: quotas, tax incentives for private business and measures to support people with disabilities into self-employment (ILO, 2003; Kett, 2012). The quota reserves 1.5% of all employment opportunities for people with disabilities and applies to both government and private sector jobs – although there is the option for firms to pay a fine equivalent to a year's wages for an average worker to an unemployment insurance fund for disabled workers. Employment service centres, of which there are now over 3,000, assist with and monitor implementation of the scheme (ILO, 2003). The number of people with disabilities employed under the quota system rose from 25,000 in 1996 to 72,000 in 2000 (ibid.). For 2006, the National Sampling Survey on Disability states that 80% of disabled people are employed and, among urban disabled workers (4.33 million people), 11.9% were employed by welfare enterprises, 11.5% through the quota scheme and 15.8% through self-employment (ILO, n.d.). There is some dispute over the accuracy of these figures (see Campbell and Uren, 2011).

The scope and function of enforcement and accountability mechanisms around this legislation appears to vary widely. An ILO

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[25] Quotas for the employment of people with disabilities exist throughout Latin America. For example, in Brazil there is a reservation of 5–20% of public service positions filled through competitive exams. Private enterprises must employ people with disabilities as follows: 2% of positions in enterprises with 100–200 employees; 3% of positions in enterprises with 201–500 employees; 4% of positions in enterprises with 501–1,000 employees; and 5% of positions in enterprises with more than 1,000 employees (Government of Brazil, 2008).

profile of China reports government data that show a very low level of inspections: just 1,186 have taken place in Chinese cities – although no timeframe or outcomes from these inspections are given (ILO, 2003).

Aldersey (2010) reports two small studies of the implementation of quotas for the employment of disabled persons in Tanzania. The first, a qualitative study of 126 companies by the Tanzania Union of Industrial and Commercial Workers, found only 0.7% of employees in the surveyed companies were disabled and only seven had a total of 3% disabled employees or more – putting them in compliance with quota legislation. Employers gave a number of reasons for non-compliance, including inadequate information and advice as well as the additional financial burden and concerns about needing to supply additional support for workers with disabilities, so reducing productivity. The second part of the study, based on the author's own interviews with people with disabilities, describe experiences of discrimination and lack of adhesion to the quota provisions – in some cases limiting educational and vocational aspirations, as illustrated in this quote from a lawyer specialising in disability advocacy (who is not disabled herself).

'Even the policies and laws are not followed. Employment is a big problem, even for those with an education; they have a hard time trying to get employment. People [with disabilities] hesitate to opt for certain professions these days, such as law, because they know they won't be employed after their training.' (p.12).

## 6.3.2 Attitude change

It is noted throughout the literature that employer and societal attitudes towards disability are fundamental in limiting access to employment (Aldersey, 2010; WHO, 2011). Some literature also notes that quotas can be 'disabling and patronising' for people with disabilities as with other stigmatised form of special treatment (Heyer, 2008), as they assume both that employers will not hire people with disabilities without a quota and that people with disabilities are not able to compete for jobs on an open market.

However, we found no impact assessments of large-scale public campaigns designed to help change negative attitudes or behaviour directly around the employability of people with disabilities. The World Disability Report does note an interesting example of an electricity company in Brazil using its compliance with the national quota for the

employment of people with disabilities for positive publicity: on the back of every bill is written 'the number of workers with disabilities is greater than that required by law. The reason is simple – for us, the most important thing is to have valuable people' (WHO, 2011).

### 6.3.3 Type of work and working environments

Transition from education to the labour market is an area of concern for all young people and particularly young people with disabilities (WHO, 2011; UNESCO, 2012 For example, Mugo et al.'s (2010) analysis of the situation of young people with disabilities in Kenya notes that many of the employment opportunities available are 'un-skilled', and can thus be both exploitative and physically demanding, such as in work on building sites or as security guards. These are unlikely to be thought of as suitable for youth with disabilities, a situation not helped by the limited options for vocational training available. We found no impact assessment studies of services that aim to support people with disabilities to find employment on the open market.

Sheltered or supported employment provides either employment in a segregated part of a regular enterprise or a sheltered environment for a whole business. The review located one study that looked at the impact of this kind of employment mechanism for disabled persons – Wan Abdullah (2013) assessed the satisfaction of people with learning disabilities employed in a supported enterprise in Malaysia, a rare example of research focused on a specific area of disability. Wan Abdullah used surveys and group interviews to examine levels of satisfaction with their working experience. It is clear the workers still encounter discrimination from their managers and customers:

> 'They know that I am disabled. They scold me as if I don't have feelings' (Chia, group interviews, p.169).

> 'They [the non-disabled employees] always teased us … saying that we can't do the job … when I try to lodge a complaint, some will say that I always grumble even for a small problem' (Azreen, group interviews, p. 173).

Despite this, respondents were generally happy with their employment and happier than they had been in previous employment. They showed the least satisfaction with the level of pay they were received, with most aspiring to be paid more money in the future. Small-

scale NGO projects designed to provide employment to people with disabilities are also common.

## 6.4 Conclusions

We found almost no evidence concerning measures to promote the political representation of people with disabilities. This appears a clear practice and research gap. There is a considerable body of evidence concerning efforts to promote inclusive school education, which is often equated, in practice, with increasing educational opportunities for children with disabilities. Rather than assessing impacts, these studies typically focus on challenges associated with implementation such as under-resourcing and teachers' attitudes. We found two studies of affirmative action to promote increased participation of students with disabilities in higher education, both from Sub-Saharan Africa. These suggested that quotas, while well-intentioned – come much too late in the education system to help significant numbers of students with disabilties, given low enrolment and high drop out rates in primary and secondary school. One of these studies indicates changes in attitudes among non-disabled students as a result of greater interaction with their disabled peers, while the other highlights the ways in which discriminatory attitudes continue to constrain disabled students subject choices and educational pathways.

We also found very little evidence concerning the impact of anti-discrimination laws and policies on disabled people in the workplace. Such legislation as exists appears not to have met its targets and discriminatory attitudes among employers continue to form barriers to disabled people's employment. Overall, there is extremely limited evidence concerning the impact of any affirmative action measures on disabled people and this is a priority area for further action and research.

# 7. Marginalised ethnic and racial groups

**Key Findings**

Across all sectors studied, there is a tension between trying to get beyond race as a category on the one hand and forming practical strategies to combat racism on the other: race- or ethnicity-based reservations can entrench social categories and increase the significance of race or ethnicity, perversely entrenching discrimination in some cases.

There is some evidence of reserved seats increasing the proportion of representatives from marginalised racial and ethnic group, and that marginalised racial or ethnic groups' representation can be enhanced in electoral systems using proportional representation, though this depends on whether parties are organised around ethnic or racial identities. There is very limited discussion of the impacts of increasing representation in these ways.

Where social movements have a strong racial justice emphasis, as in Latin America, views are contested as to how far enhancing representation of marginalised ethnic and racial groups in state structures is an effective route to reducing discrimination, and how far it is a means of co-opting and demobilising protest and collective action.

Overall, mother tongue or bilingual education in the early grades of primary school particularly benefits marginalised racial or ethnic groups who do not speak national languages at home, as well as poorer children without access to media in national languages. There is an unresolved debate concerning language of instruction in later primary school and secondary school, with education studies showing greater learning in home languages but concern among parents that children educated in local languages may miss out on proficiency in languages essential for better-paid employment, and functioning in the public sphere.

Focused packages to promote ethnic minority education (including increasing school availability and financial support) have played an important role in increasing educational levels among Vietnam's ethnic minorities. By contrast, in Mexico, cash transfers conditional on educational attendance are bypassing some of the poorest indigenous groups, who live in remote areas.

Race- or ethnicity-based reservations in higher education have been broadly successful in increasing these groups' participation. There is evidence from Brazil that these have been pro-poor but in most cases financial support and catch-up courses are needed alongside reservations to enhance marginalised groups' access.

Evidence from South Africa's labour market suggests that affirmative action policies have not worked as well as expected with Black people still concentrated in low-end to middle-range jobs, while White and Indian people are concentrated in middle-range to top-end jobs.

There is also some evidence that gains from Black Economic Empowerment in South Africa (including distribution of share ownership) have primarily benefited a small Black elite. By contrast, similar affirmative action policies in Malaysia have contributed to reduced poverty and increased representation in top management positions among the formerly disadvantaged Bumiputera group.

## 7.1 Political representation

There is some cross-over in the literature on political representation of marginalised racial and ethnic groups with the literature on women's representation, particularly in relation to Latin America. There is also a strong strand of unease in the literature, related to concerns about entrenching racial and ethnic categories and thereby potentially increasing rather than reducing the likelihood of race- or ethnicity-based discrimination. Overall this literature draws more strongly on political economy and historical analysis than on analysis of quantitative datasets. The majority of evidence discussed in this section comes from Latin America, reflecting the electoral success of a number of leftist parties with strong social justice agendas in recent years, which have emphasized redress for historically marginalised ethnic and racial groups.

Bird (2014) cautions against conflating women and ethnic groups' representation, which she says is evident in the global literature on electoral systems and electoral engineering. This literature tends to emphasise structural barriers to women's and marginalised ethnic and racial groups' representation as being the effects primarily of electoral rules and ballot structure. However, closer examination suggests **the causal mechanisms affecting representation levels of women and marginalised ethnic and racial groups within proportional representation systems are somewhat different,** and that the **benefits of**

**proportional representation for minority ethnic groups are often contingent on the presence of ethnic parties that provide strength of group identity.**

Hodzic and Mraovic (2015) support Bird's analysis of ethnic minority representation. They present comparative qualitative case studies of eight municipalities in Bosnia and Herzegovina to explore the effectiveness of different arrangements for political representation of minorities in terms of actual influence on decision-making and accountability to their constituency, in relation to the political background and party affiliation of minority representatives. First, it is found that **reserved seats have had an overall positive, but in reality rather modest, effect in terms of strengthening the political voice of minorities in decision-making.** Second, party affiliation and support of minority representatives are crucial factors in establishing and effectively maintaining substantive representation.

Htun also picks up the difference between representation for women and ethnic minorities. Htun (2004b) uses case studies from France, India and Peru to argue that women tend to be given quotas within parties whereas ethnic minorities get reservations in legislatures. She argues that **organising for women's quotas is like a class action, but once women enter office the logic for the unified action disappears. On the other hand, a legislative reservation strengthens ties between group members but may magnify differences between groups.** "The choice between softening or hardening difference inevitably arises in the quest for political justice. Policymakers designing institutions and the scholars advising them should take notice lest they unwittingly trade a legislature of white men for a fragmented, even polarized political society" (p.85)

Htun (2004a) in relation to Brazil and Alexander (2007), discussing South Africa, explore the danger of entrenching the category of race. Htun (2004a), drawing on experience in Brazil, argues that, since racial categories are easily deployed in racist ways, it might be desirable to move beyond the concept of "race". However, she acknowledges that race has validity as a social category, as racial labels shape human identities and social relations. There is a tension between trying to get beyond race as a category on the one hand and forming practical strategies to combat racism on the other.

Htun and Ossa (2013) consider the difference of political inclusion for women and indigenous groups in Bolivia. They find women have mobilised across class and ethnic lines and succeeded in gaining parity in participation. However, indigenous movements have continued to

struggle to have their demands for inclusion accepted by a government otherwise pledged to their cause. They explain these diverse outcomes through differences in the social movements that support demands for change. Whereas women united over the single issue of gender parity, different parts of the indigenous movement offered different proposals for inclusion and reserved seats, and this has worked against unity. The parity issue also affects all women whereas reservations were targeted at numerically small, rural groups. The authors claim the Bolivian state wants to be inclusive and therefore finds claims to indigenous autonomy to be threatening.

Schilling-Vacaflor (2011) also finds this tension between inclusion and co-option in the 2009 Bolivian constitution, which aims to create a representative, participatory and communitarian democracy, combining enhanced mechanisms and institutions for participatory democracy with new social rights. She suggests there are many limiting factors when it comes to putting the emancipatory elements into practice. These include 'the increased strength of the executive branch, the intent of the government to co-opt civil society organizations and to exclude dissident views, the resistance of the conservative opposition to losing some of its privileges, the deep-rooted social inequality, the social conflicts and polarization, the resource dependence of the current economic model, and the authoritarian characteristics of indigenous self-governance structures' (p.3). We should note here that indigenous self-governance structures have their own lines of power, discrimination and inequality and the Bolivian state is struggling with integrating these into the reshaping of the state.

Walsh (2015) analyses a similar tension in Ecuador. This research shows a split between those who suggest the inclusion of Afro-Ecuadorian individuals and organisations in the state is a historic shift in tackling discrimination and those who see this only as co-option and an attempt to demobilise protest and collective action. Walsh suggests Afro-Ecuadorian organisations have become somewhat complacent on the issue as more leaders and community members are offered jobs within the state.

Palmieri (2010) documents Vietnamese efforts to incorporate ethnic minorities into the National Assembly through a National Council of Ethnic Minorities and a broad stated desire to be inclusive. This report is descriptive but show some success in increasing the participation of women and ethnic minorities through quota mechanisms. There is a gap

in the literature on political inclusion of different ethnic groups in the Asia-Pacific region in general.

## 7.2 Education

This section focuses on three sets of issues: mother tongue and bilingual education reforms, which often disproportionately benefit marginalised racial and ethnic groups; broader affirmative action to increase marginalised ethnic and racial groups' access to schooling, and affirmative action measures targeted at these groups in higher education.

### 7.2.1 Mother tongue and bilingual education reforms

Reforms of language of instruction have been undertaken in many countries to enhance enrolment, retention and learning, typically been in contexts where national languages are those of a former colonial power (e.g. Spanish in Latin America, French, English or Portuguese in much of Africa) and are not widely spoken at home. The extent to which these policies are conceived as anti-discriminatory varies: in Latin America, in particular, there is a broad anti-discriminatory thrust to policies of this type, which are part of a broader set of measures to promote substantive equality between indigenous or other marginalised ethnic groups and dominant ethnic groups, which are typically not of indigenous heritage, and are often referred to as 'bilingual intercultural education' (Lopez and Sichra, 2007). Likewise, in some countries (e.g. India), home language instruction in primary schools has been introduced in areas where children speak tribal languages rather than the state language or English (Panda et al., n.d.). In other countries, particularly in Sub-Saharan Africa, language reforms are often intended to enhance learning among the majority of the population who do not speak the national language at home and do not have access to it through the media, books and other resources available to the children of the elite.

Typically, these programmes involve teaching a designated home language (intended to be the majority home language of the area) for the first few grades, with the national language and/or English taught as subjects, transitioning to instruction in the national language or English in late primary school or secondary school. Specialists in language and educational development increasingly argue for transition programmes to begin after six or more grades of schooling in the home language, when

children have had the opportunity to develop a strong grasp of that language (Global Campaign for Education, 2013).

There is a growing body of quantitative evidence indicating the positive impacts on children's learning of home language instruction. For example, Lopez and Sichra (2007) cite four studies on Mexico and Peru that show increased educational achievement in language and literacy (and 'other subjects' [unspecified]) among indigenous children educated in bilingual schooling as compared with Spanish-language schooling, even if they have only three to four years of primarily mother tongue education. They also cite two studies from Bolivia and Guatemala that show significantly higher levels of self-esteem and greater capacity for adaptation and dealing with frustration among indigenous children whose schooling had been bilingual. Some literature reviews also highlight evidence of limited impacts – for example Hynsjo and Damon (2015) cite several studies from Peru that find no significant differences between attainments in bilingual and Spanish-language schools. In the time available for this review, we were able to locate six first-hand studies and also draw on evidence from other initiatives summarised in reviews. Table 4 summarises the findings from primary studies. These show mixed but overall positive results from mother tongue education in the early grades of primary school.

**Table 4: Summary findings – primary studies on bilingual or home language education**

| Study and location | Findings |
|---|---|
| Hynsjo (2014) Peru | Indigenous children who attend schools whose teachers are trained in intercultural bilingual teaching achieve 0.73 standard deviations higher scores in mathematics and 0.35 standard deviations higher scores in language, compared with indigenous children who attend Spanish-medium schools or intercultural bilingual (EIB) schools where teacher are not trained in EIB teaching. |
| Damon and Hynsjo (2015) Peru | Indigenous children who attend Quechua-medium schools achieve mathematics scores 0.54 standard deviations higher than indigenous children who attend Spanish-medium schools. There is weak and inconclusive evidence that indigenous children who attend Quechua-medium schools attain higher language test scores and no evidence these effects are caused by quantitative or language achievement prior to entering school. |
| Hovens (2012) Guinea Bissau and Niger | Test results in Niger demonstrated that pupils who started in their mother tongues could read and write better even in the second language. Observations in both countries indicated that bilingual classrooms were more stimulating, interactive and relaxed. However, there was no discernable impact on maths scores in Guinea Bissau. Rural children and girls gained the most from participating in bilingual programmes in both countries. The language of testing made a major difference to results with children typically performing better in their home language. |
| Benson (2001) Mozambique | Using data from two provinces , Benson found the percentage of female bilingual students who remained in school through Class 4 was 11% higher than for bilingual boys, and 39% higher than the national average for girls. In Tete province, bilingual girls scored better on tests than bilingually educated boys or children in non-bilingual schools of either gender, though boys outperformed girls in some subjects. |
| Panda et al. (n.d.) Andhra Pradesh and Orissa, India | In both states, children in multilingual schools scored better on all areas tested (language, maths, environmental studies). In multilingual schools, teaching and learning materials were used more frequently (they were often locked away in the comparison schools), possibly reflecting the additional training given to teachers to implement multilingual education. |
| Cuadra et al. (2008) Orissa, India | Overall in Orissa, multilingual education had a positive effect on enrolment rates, has led to decreased dropout rates and has raised community awareness of and participation in education. However, absenteeism (particularly of girls) has continued to be a major problem, with children missing over a third of teaching days in some schools because of farm and domestic work commitments. |
| Lee et al. (2015), Kreung and Tampeun ethnic minority | Students in bilingual schools performed better in mathematics than their peers in the monolingual schools, but the differences in Khmer literacy and oral Khmer test scores were statistically insignificant. |

| children in Cambodia | |
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| | |

Bilingual or home language education is controversial, with some parents fearing children will not adequately learn the languages that give them access to commerce and political voice. However, the studies examined do not bear this out, as by the end of primary school children who have attended bilingual education programmes typically perform as well or better on core assessment measures (so long as tests are in a language in which children have developed competence over the period of their education) as compared with those whose education has entirely been in the national language (Heugh et al., 2010, in Heugh, 2011). A few studies (e.g. Benson, 2001; Hovens, 2002) suggest home language education has a greater positive impact on girls than boys, as girls are in many cultures less exposed to the outside world and have fewer opportunities to acquire national languages. However, Smits et al.'s (2009) comparative quantitative study of 26 developing countries found that overall there were not significant gender differences in impact and boys and girls benefit equally from mother tongue education.

Several studies emphasise the importance of an adequate supply of learning materials (Contreras and Simoni, 2003; Cuadra et al., 2008) and of effective, ongoing in-service training of teachers in their use and in bilingual/mother tongue education more broadly. Issues of cost-effectiveness are not much reported. However, World Bank research in Guatemala and Mali (cited in Global Campaign for Education, 2013) found overall bilingual education was actually more cost-effective than national language instruction, once the costs of repetition and dropout were taken into account. Introducing mother tongue-based bilingual schooling created savings of $5.6 million a year through reducing dropout and repetition, despite higher initial costs for introducing new materials and teacher training. In Mali, although French-only education cost 8% less than multilingual education, the total cost of educating a student through the six-year primary cycle in French was 27% higher because of high repetition and dropout rates. The Global Campaign for Education highlights ways of reducing the costs of developing materials in home languages, such as the use of shellbooks that can be printed out in the desired language.

Overall, these studies indicate that mother tongue education in the early grades of school with transition to national languages as media of

instruction as appropriate can have a positive impact on children's learning (and often particularly benefit discriminated against ethnic and linguistic groups). The studies were mostly conducted in linguistically homogenous areas where there is a clear home language spoken by all or the majority of children. This review found limited assessment in areas where home languages are mixed. Nor does the literature on bilingual education and disadvantaged children's learning outcomes discuss issues of inequality related to elite children being educated in a national or international language.

## 7.2.2 Broader affirmative action in school education

We found very limited evidence concerning the impact of broader inclusive education policies on marginalised racial or ethnic groups. This may be because some governments' data collection systems specifically avoid collecting data on race or ethnicity. Also, where marginalised racial and ethnic groups are geographically concentrated, policies aimed at reducing geographical disparities in education may actually function to reduce ethnic or racial disparities in access or achievement. Where poverty rates are significantly higher among certain ethnic or racial groups, policies to combat economic factors that reduce access to education and educational achievement (such as cash transfers or scholarships) may function as affirmative action for the affected groups. However, because these policies are generally analysed in terms of their overall impacts on educational enrolment and attainment or their impact on transfer/ scholarship recipients, they do not shed light on how far such policies have functioned to reduce ethnic or racial disparities. One exception is a set of studies of the impact of Oportunidades[26] conditional cash transfers in Mexico, which suggests that these bypass the poorest indigenous people who live in the most remote area (Ulrich and Roelen, 2012).

In this sub-section we discuss insights from two studies of explicit efforts to reduce race- or ethnicity-based disparities in school education.

Though it does not assess the overall effectiveness of South Africa's education policies in terms of the inclusion of marginalised groups, Sayed et al.'s (2007) study on educational exclusion – based on qualitative research in 13 schools in South Africa (and 16 in India) – found that

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[26] This programme has now been expanded and renamed Prospera.

formal inclusive policies intended to combat race-based exclusion, in particular, were – to a greater or lesser degree – being undermined by school practices intended to maintain standards. For example, a significant number of schools impede access through residential requirements, language use and levying of high school fees, all of which function to exclude poorer black children. Furthermore, increased funding allocations could not make up for a legacy of underfunding and neglect (van der Berg, 2002).

Vietnam has made significant provision to increase ethnic minorities' access to education, particularly secondary school, where their attendance rates have historically been significantly lower than those of the Kinh majority and much lower than ethnic minority attendance in primary school. Policies have concentrated on three main areas: increasingly the availability of schools via building new schools and classrooms, the provision of boarding houses in remote areas and incentives for teachers to work in remote areas; addressing cost barriers through fee waivers, grants for the provision of school materials, transport grants, textbook loans, etc.; and some efforts to train bilingual teachers and promote bilingual education, at least in the first year of primary schooling (Nguyen and Baulch, 2007). We were unable to find any quantitative assessment of this package of policies but qualitative evidence from the highlands of northern Vietnam suggests they have played an important role in establishing education – at least up to Grade 9 – as normal and desirable, for girls as well as boys (Jones et al., 2014).

### 7.2.3 Access to higher education

Compared to school education where policies generally focus on universalising education to combat regional/ geographical, socio-economic and gender disparities, we found race-based affirmative action policies to be more common in higher education. Specifically, we found evidence of the impact of race- or ethnicity-based affirmative action policies in higher education in Brazil (one primary and one secondary study), Malaysia (four studies), Vietnam (one study) and South Africa (three studies).

### Malaysia

Affirmative action policies in Malaysia, intended to reduce poverty among and enhance the position of people of Bumiputera descent (i.e.

ethnic Malay or indigenous), have focused on both higher and school-level education. Affirmative action in Malaysia's higher education sector has involved expansion of educational facilities, quotas and reservations in state institutions, and the development of some Malay-only institutions.

Overall, these policies have successfully raised the proportion of students of Bumiputera descent at public universities (from 40% in 1970 to 62% in 1988 and from 62% to 69% over the 2000s (Rao, 2009).[27] However, there is some evidence that benefits have accrued disproportionately to better-off Bumiputera (Lee, 2012, Rao, 2009), despite some focusing of efforts on expanding higher education provision in 'rural and underprivileged areas', and that, as beneficiaries of affirmative action, Bumiputera are disproportionately concentrated in public universities (Lee, 2012).

There is, however, some evidence that graduates of public universities are often less employable than those in private universities and end up in lower-paid jobs as a result (Lee, 2010). This reflects an absence of soft skills, which are in demand by employers, among graduates of this group, a disproportionate concentration of Malay students in Malay-language institutions with potentially fewer opportunities to acquire English language skills and an underrepresentation in scientific and technical fields of study (Lee, 2012). To address this, the Malaysian government opened residential science schools to equip Malay students for entry into technical courses at colleges and universities (Rao, 2009). In the early 2000s, responding to Chinese and Indian disillusionment with affirmative action policies that were perceived as unfair, quotas for non-Bumiputera students were introduced at these institutions (Lee, 2012).[28] In the 1990s and 2000s, private higher education facilities expanded enormously and disproportionately draw from the Chinese and Indian minorities, who had previously studied abroad, undertaken non-degree tertiary education or not continued in education after secondary school (ibid.). The increase in Malay enrolment in private higher education over time has not lead to a more ethnically integrated higher education sector – ethnic enclaves have continued to persist – for example, in 1999, in private higher education institutions, the Malay and non-Malay student breakdown was 16.3% and 83.7%, respectively (Lee, 2005).

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[27] These percentages are rounded up from those in Rao's paper.
[28] The papers reviewed do not discuss the motivation for this change, but it may reflect political considerations.

Together with measures to increase the share of assets owned by Bumiputera, and broader growth promotion and poverty reduction measures, affirmative action in higher education has been part of a package contributing to a considerable reduction in poverty, such that poverty is now not as racialised as it was in the 1960s. For example, poverty levels are disproportionately high among the rural Indian population as well as Orang Asli (indigenous people) (Lee, 2005) and rural Malays. This – plus the perceived denial of opportunities to non-Malay students –has led to calls for affirmative action to focus on poorer students rather than specific ethnic groups (Rao, 2009). When quotas have been relaxed or removed, other ethnic groups' take-up of places formerly reserved for Malay students has been limited (Lee, 2005). This has possibly reflected financial barriers to take-up and the different secondary education systems primarily attended by Malay and ethnic minority students, respectively (Lee, 2012).


## Vietnam

Vietnam has also implemented measures to promote ethnic minorities' access to higher education. There are one-year pre-university courses for ethnic minorities who almost qualify for university education to enable them to participate in a full course of study. The law provides for up to 100 ethnic minority students per province, who have lived in areas designated as 'extremely difficult' and who have passed upper-secondary school leaving examinations, to be nominated to proceed to higher education, rather than entering via competitive examination. Since 1995, ethnic minority students have been able to study alongside Kinh students at university. A number of universities run separate classes for ethnic minority students, though it is less clear whether these measures promote extension of opportunity or undermine social integration. Bui (2006) in Nguyen and Baulch (2007) report that the number of ethnic minority students nominated to colleges and university tripled from 689 in 1998 to 1,709 in 2005, which is likely to reflect an intensification of policy aimed at boosting ethnic minorities' educational and developmental opportunities.


## Brazil

Evidence from an affirmative action programme at the University of Brasilia found racial quotas helped promote equity for Afro-Brazilian

groups and students who gained access in this way were from lower socioeconomic groups than those they displaced (Francis and Tannuri-Pianto, 2012). Approximately 71% and 27% of the displacing students were racially mixed or black, compared with 31% and 2%, respectively, of the displaced students. About 95% of the displacing students identified themselves as black compared with 16% of the displaced; 40% of displacing and 19% of displaced applicants were from lower-income families; 8.5% of displacing and 31% of displaced applicants were from higher-income families (Clifford et al., 2013).

## South Africa

Unlike Brazil, India and Malaysia, South Africa has not instituted formal racial or gender targets or quotas in schools and universities (Lee, 2010). Instead, post-apartheid policy pursued twofold objectives of increasing black presence in historically white institutions and narrowing the perceived, real or reputed quality gap between historically white and black institutions. One key approach to increasing black presence in white institutions was to remove racial restrictions on student applications. This led to a growing proportion of black students enrolling in historically white institutions: in 1993, 49% of black students were in historically black institutions and 13% in historically white institutions; by 1999, the respective percentages were 33% and 39%, with the remainder in distance learning (Lee, 2010). However, although post-apartheid policies have led to a dramatic increase in higher education access for black students and women, the overall participation rate has decreased. Access is still possible only for a small elite: the participation rate for Africans, for example, increased from 9% in 1993 to 13% in 2000 (Cloete, 2002) and graduation rates remain below those of other racial groups (Lee, 2010). Furthermore, access of black students has not improved significantly in the high-status and high-skill areas such as the sciences and engineering, or in postgraduate programmes (ibid.).

Despite a picture of limited progress in aggregate, case studies of individual universities show a greater degree of change. Khan et al.'s (2013) study of changing racial and gender composition of students in a medical school in Durban, South Africa, finds that, since the end of apartheid and the outlawing of racial or gender discrimination in admission, the number of black African and female medical students has increased considerably, particularly in historically white institutions. Other initiatives include the development of community education sites

and the introduction of a graduate entry medical programme at one university, which admits those who have successfully completed an undergraduate degree, thus offering students who may not have been eligible straight after school (likely to be disproportionately black students, whose high school graduation rates are lower) an alternative entry route to medical training. Downs' (2010) study of the impact of a science and English language foundation year at the University of KwaZulu-Natal finds that this initially contributed to increasing the numbers of black science graduates, even though students on the foundation course left school with poor matriculation scores. Alumni of both this programme and that at the University of the North completed their degrees in less time than students who had entered through the mainstream route. Downs argues such programmes serve both to allow historically disadvantaged students to meet their potential and as a filtering mechanism for individuals not suited to degree-level study.

Some financial support has been made available to economically disadvantaged students (Cloete, 2002; Lee, 2010) – this has been the main way of achieving educational redress, rather than quotas. We were not able to locate any studies that directly assessed the impact of this financial support on equalising participation rates or improving black students' outcomes.

## 7.3 Affirmative Action in Labour Markets

Reflecting the emphasis of the literature located for this review, this section primarily focuses on affirmative action policies in South Africa and Malaysia, for which studies were available that looked beyond national employment data to broader impacts of affirmative action on well-being, and attitudes and criticisms of the approaches. There are no available systematic reviews in this area, although Browne (2013) gives an overview of measures taken in public sector employment through an annotated bibliography of the literature on Australia, India, Malaysia, Nigeria and South Africa. She finds a lack of data for more contexts but suggests strong national leadership is essential for the successful implementation of policies. She draws on the example of Nigeria, where weak control of implementation has led to ethnic fragmentation and conflict over the jobs available.

Affirmative action policies are also in place in countries including Nigeria and Sri Lanka and across much of Latin America. Latin American policy often targets people of African descent and broadly embraces

affirmative action as a human right and in response to reports from the Special Rapporteur on Contemporary Forms of Racism, Racial Discrimination, Xenophobia and Related Intolerance and the Durban conference processes (Human Rights Committee, 2009). In most Latin American countries, policy seems to focus on provisions to access education. Brazil has a more comprehensive programme: a longstanding quota system for civil service positions in many states, a 2014 law that reserves 20% of federal civil servant positions for people with black or *pardos* (mixed race) identity and a requirement for companies that supply the government to also meet the 20% quota (Conceicão, 2014). We were not able to locate any evidence on the impact or implementation of race- or ethnicity-based labour market affirmative action policies in Latin America.

### 7.3.1 Affirmative action in South Africa[29]

In the aftermath of apartheid, the South African government is committed to redressing injustice (Ncube et al., 2012) and minimising discrimination based on demographic profile (race, gender) or disability or HIV status (Bezuidenhout et al., 2008) as part of the creation of a non-racial South Africa. Affirmative action policy in South Africa encompasses both ending discriminatory practices and remedial action to ensure equity (Burger and Jafta, 2010). The legal and policy framework for affirmative action has expanded in scope since the passing of the Employment Equality Act (EEA) in 1998. A Black Economic Empowerment (BEE) policy framework was put into place in 2003, criticism of changes achieved lead to the development of the Broad-Based Black Economic Empowerment framework implemented in 2007 a more comprehensive and transformational set of policies.

Individual companies are required to measure their progress in seven areas: equity ownership; management; employment equity; skills development; preferential procurement; enterprise development; and socioeconomic development. For this review, we were unable to locate relevant literature for most areas of this framework; in this section, we focus on the change achieved in employment equity and in shifting public opinion. Later in the section we consider Black Ownership Initiatives.

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[29] In this section we use the racial categories in current use in South Africa, as reported in the studies we discuss.

The government collates scores and publishes an annual report that gives an overview of progress towards equality in the labour market. As discussed below, the effectiveness and resourcing of monitoring and implementation is an area of concern. It is beyond our scope to consider the political economy of the formation of affirmative action policy or the broader workings of government – though we do at the end address some of the criticism of affirmative action and its meanings in modern South Africa.

The 1998 EEA supports the goal of employment equity. The Act obliges employers to implement affirmative action measures to ensure discrimination does not occur based on demographic profile – race, gender, disability or HIV status. It includes both numerical targets and the identification of barriers to employment (Burger and Jafta, 2010). Companies with more than 150 employees are required to produce an employment equity plan (EEP) to detail the steps they are going to take and are required to report annually to the government. There is also a system of inspection visits, sanctions and 'public shaming'. The provisions of this Act designed to eliminate gender-based discrimination have already been discussed in Section 3.3.

## Impact of employment equity measures

Analysis of labour market data to show the direct impact of affirmative action policy is extremely difficult, especially as so many factors can lead to changes in the make-up of the labour market – both in the market and economy and because of changes in foundational factors like education and skill levels. We located four studies that look at the extent of change in the market: three of these (Burger and Jafta, 2006, 2010; Hinks, 2009) use statistical techniques to directly estimate the impact of the EEA. The available data analysis is limited to formal sector employment, given the shape of the South African labour market and growth and that informal sector gaps are likely to be wider than they appear from the data analysis presented below.

The general finding is that affirmative action has not worked as well as expected. That Black African people have remain grouped in low-end to middle-range jobs, while white and Indian people have tended to be grouped in middle-range to top-end jobs is supported by all of the literature included in this section (Bezuidenhout et al., 2008; Burger and Jafta, 2006, 2010).

Burger and Jafta (2010) use data from October Household Surveys and National Labour Force Survey from 1997 and 2006 to look at changes in levels of employment by race. They find the racial gap in the likelihood of finding employment increased from 28% in 1997 to 38% in 2003 and then dropped to 28% in 2006. The authors use the Oaxaca-Blinder econometric analysis technique to explain these differences and suggest they do not point to a reduction in discrimination. Instead, they argue, a period of rapid economic growth between 2003 and 2006 and a narrowing of the skills gap between White and Black workers explain the changes.

Burger and Jafta (2006, 2010) also consider the impact of affirmative action measures on the wage gap between White and Black workers. They find the gap has actually increased since 1997, when a typical male White worker could expect to earn approximately 90% more than a Black worker, and a White female worker 70% more. However, by 2000 the wage gap had risen to 120% between men and 90% between women; it has remained relatively stable since. The authors' analysis technique points to a higher return to education for White workers as the reason for this increased inequality, reflecting both perceptions of the poor quality of education received by many Black students and ongoing systematic inequalities. Bezuidenhout (2008) looks at labour force data by sector and finds a slight increase in the proportion of top legislators, senior officials and managers who are Black. The small degree of change – from 2.6% in 2000 to 3.3% in 2007 – suggesting few people have really benefited from these policies.


## Effectiveness of equity ownership

Equity ownership makes up 20% of the BEE scorecard designed to eliminate the racial divide in the ownership of companies (Ncube, 2012). The preferential procurement system means this measure is particularly important for firms that supply the government and is increasingly seen as important for other companies to retain their customers (Sartorius and Botha, 2008).

Sartorius and Botha (2008) is the only study we located that estimates the effects of the equity ownership policy. The authors surveyed 72 companies listed on the Johannesburg Stock Exchange and used thematic analysis techniques to look at successes and failures in BEE ownership initiatives. They found 27 companies had transferred 10% or less of total equity, 28 between 10% and 25% and only 17 25% or more. Ten of the

companies that have transferred 10% or less are financial institutions and were required to transfer 10% of equity by 2009 and to reach 25% by 2014. Three companies had transferred more than 30%: major shareholders had identified the need to become BEE-compliant and had been willing to sell a part of their stake in the company to assist in meeting the requirements. Survey respondents were asked why they had introduced BEE ownership initiatives. The highest-ranking reason, with 37 responses, was 'BEE is essential for South Africa to sustain its economic and democratic structures'. This was closely followed by the statement, 'Companies see BEE as an opportunity to grow their business and market share', which was given 32 times.

## BEE implementation and monitoring

We located two studies that used quantitative data to address questions of how satisfied workers are in their roles (Hinks, 2009) and how well they feel their employers have implemented BEE framework policies (Zulu and Parumasur, 2009). One study (Bezuidenhout et al., 2008), looked at how well compliance with EEA legislation was being monitored and enforced. The studies suggest more measures are needed to enforce the legislation and to ensure the correct groups are benefiting from Broad Based BEE policy.

Bezuidenhout et al. (2008) conducted a large-scale study of the impact and implementation of the EEA using data from the South African Labour Force Survey and interviews with government officials and employers. They found legal use of the Act had been very limited and that it was extremely difficult for an individual to take an anti-discrimination case to court. Informants were clear that officials had focused on procedural rather than substantive compliance since 1998, given a lack of capacity for inspections and the volume of other labour issues a single visit needs to cover. There was also a feeling that in-company training and accessibility of information had a positive impact on implementation. Very few interviewees in companies reported ever having received a visit from a labour inspector; they also said they felt EEA reports disappeared into a 'black hole' once sent to the labour ministry.

Hinks (2009) use data from the Mesebetsi labour force survey of 10,000 individual respondents in late 1999 to look at the impact of affirmative action legislation on levels of job satisfaction – which includes earnings, job security, type of work, opportunities to use

skills/education, working time, working conditions and distance from work. White workers were the most satisfied and Black workers the least satisfied. Black workers are significantly more satisfied when in roles in companies with an EEP and there is no significant difference for White workers. However, "Coloured"[30] workers, who should also benefit from affirmative action policy, are less satisfied when working for an employer with an EEP.

Zulu and Parumasur (2009) used questionnaires and interviews with 668 employees to look at the management of cultural diversity and workplace transformation in three production companies in Gauteng. The authors use descriptive statistics to show that employees perceive that companies have made insufficient efforts towards achieving equity in the workplace and have little confidence in the extent of employee involvement in the process of managing and creating a more equitable environment. In qualitative interviews, employees' opinions were split about both the measures taken within the company and whether South African business as a whole is committed to addressing cultural diversity in the workplace: 34.7% of respondents agreed business was committed and 34.7% disagreed and 33.6% remained neutral. It should be noted that the authors do not give a racial breakdown of their respondents and there are a high number of neutral answers throughout the study.

Roberts et al. (2011) draw on data from the nationally representative South African National Attitudes Survey between 2003 and 2009 to look at changing attitudes to the effectiveness of affirmative action policies in the labour market. They find nationally a broad level of support for affirmative action as a form of redress: 60–70% of people always strongly agree there should be racial and gender-based affirmative action in the workplace. There is also a broadly positive attitude towards the outcomes of affirmative action in 2009: 71% of respondents agreed it was 'contributing to a more skilled workforce' and 68% that the policy was creating a more unified society. Indian and Coloured respondents were more sceptical about the impacts, echoing Hinks' (2009) finding that all included groups do not seem to be benefiting equally from the EEA. Roberts et al.'s analysis also reveals that residents of informal settlements, the young and the unemployed are likely to have less positive attitudes towards affirmative action.

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[30] The term "Coloured" is no longer an official designation of the South African government. We use it here to reflect the language used in the paper and it is based on respondents' self-identification.

A lack of clarity and compulsion in the legislative framework is identified as a barrier to implementation in a number of papers (Roberts et al., 2011; Sartorius and Botha, 2008; Zulu and Parumasur, 2009) alongside a feeling that the policy has benefited a narrow band of people so far (Bezuidenhout et al., 2008; Roberts et al., 2011). The BEE framework and its enforcement mechanisms in South African continue to evolve and develop. For example, since 2014 all employers regardless of size are required to report to the government on their compliance with the EEA; one example of a recent legal ruling is Solidarity v. Department of Corrective Services (CASE No C.368/12), in which a group of Western Cape Correction Services officers claimed they had unfairly been denied promotion because the organisation's EEA plan was formulated to favour Black Africans rather than Coloureds against regional demographics. The Department of Correctional Services was required to take immediate measures to ensure EEA plans better represented the regional demographics of people of designated groups (CEE, 2014).

## Some criticisms of affirmative action

South Africa's constitutional commitment to equity and equality has led to broader and more comprehensive affirmative action policies, but the evidence brought together in this review illustrates that there are significant problems with enforcement, reach and impact. A central question in the discourse around affirmative action is whether it is designed to achieve demographic representation or poverty alleviation, and how these two goals of the state can be combined (Bentley and Habib, 2008).

Structural inequality in South Africa is based in both the legacy of the colonial settlement and unequal distribution of assets and institutions under apartheid. Inequalities are not solely centred on race but also play out in factors such as class, geographic location and the industry-based formal economy. Failure to transform the education system means this is another site of continued exclusion (Vandermoortele et al., 2013). **Lack of an economic definition of beneficiary groups has resulted in measures that mostly benefit a small, politically connected, well-educated elite** (Alexander, 2007; Boshoff and Mazibuko, 2003) and more broadly have failed to create economic opportunities for the marginalised majority (Durrheim et al., 2009). The nature of South Africa's economic growth has led to what Vandermoortele et al. describe as 'jobless de-

agrarianisation', with millions of people with marginalised livelihoods unable to participate in either the formal or the informal economy and argues that the failure to transform the education system further exacerbates inequality

Criticisms have also been made around racial categories. Dupper (2008) argues that, although the replication of apartheid-era racial categories is required to begin to provide redress, this also functions to reinforce the normality of these categories as people's primary means of representing themselves. This means the complex realities of intersecting inequalities cannot be either considered or dealt with in the current structure. Mbembe (2015) expresses concern regarding the emerging discourse of transformation, which uses a self-reliant neoliberal ideology to erase the historical privilege of White South Africans, minimise the experience of racial inequality and argue that White South Africans are paying a high social cost for affirmative action laws and policy. He stresses the contrast with ideas of transformation based on redistribution of wealth and capital that suggest a move towards a more class-based affirmative action system (Bezuidenhout et al., 2008; Burger and Jafta, 2006, 2010), but argues that progress towards equality requires a new politics of racial solidarity and responsibility that moves away from ideas of entitlement.

## 7.3.2 Affirmative action in Malaysia's labour markets

Malaysia's experience of affirmative action and economic empowerment of the indigenous Bumiputera community seems to have been more successful in terms of poverty reduction than the application of similar programmes in South Africa (Sartorius and Botha, 2008). The New Economic Plan was first implemented in 1970 when Malays made up 57.6% of the population and 65% lived in poverty, and now includes employment and equity ownership quotas in the public and private sectors as well as measures designed to assist enterprise development (Lee, 2012; Sartorius and Botha, 2008).

We located a limited evidence base on the impact of the policy but there seems to be general agreement in the literature that the policies have been broadly successful. Sartorius and Botha (2008) note that, although overall levels of inequality have not fallen in Malaysian society, the gap between different ethnic groups has lessened. Country-level data reported in Yusof (2006) shows income disparity between the Bumiputera and other groups reduced significantly between 1970 and

1993 and, while Bumiputera share ownership remained at 19% between 1990 and 2002, non-Bumiputera ownership fell by 4%, so this actually represents progress.

Lee (2012) uses a range of national data to look at the relationships between affirmative action in the education and labour market and employment outcomes. Analysis shows unemployment for Bumiputera who have received a tertiary degree remains higher than for Malaysia's other ethnic groups – at 4.8% compared with 2.2% of Chinese and 4.0% of India Malaysians in 2007. Lee draws on several small qualitative studies with business owners to argue that this reflects attendance at public university and colleges where English is not the main language of tuition and graduates are generally less favourably regarded. However, progress into higher-level technical and professional public sector jobs appears to have been steady for Malays. However, non-Malay Bumiputera (indigenous groups) are still notably under-represented. In 2006, despite constituting almost 12% of the population, they occupied only 1.4% of top management positions and 3.2% of manager and professional roles, compared with Malays, 50% of the population, who occupied 83.9% of top management positions and 81.6% at management and professional levels (Lee, 2010).[31]

## 7.4 Conclusions

Taken together the evidence in this section does not suggest that affirmative action measures have played a major role in increasing or sustaining the political representation of marginalised ethnic or racial groups. Rather, effective change seems to have been driven by social justice-oriented political parties in the political domain, but there are a number of caveats. In particular, there is some evidence that increases in marginalised ethnic and racial groups' political representation have been associated with enrichment of a small elite from the designated group, cooptation of leadership and a dulling of urgency around racialised social justice issues. There are also concerns, also apparent in the literature on labour markets, and to a lesser extent on quotas in higher education, that affirmative action based around ethnic or racial designations can entrench divisions and can easily be manipulated to promote racist agendas. These concerns are also reflected in debates on caste-based affirmative discussed in the next section.

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[31] Population data drawn from CIA Factbook

Beyond expanding overall access to education discussed in Section 4, which in some countries disproportionately benefits people from marginalised racial and ethnic groups living in remote areas or urban slums, the principal measure aimed at enhancing the educational prospects of children from marginalised racial and ethnic groups has been bilingual education or mother tongue instruction bridging to national language-based education. The evidence on impacts on marginalised groups' educational achievement is broadly positive, though some studies show no major effect in some subjects. None have yet traced impacts into adulthood and young people's employment prospects.

Affirmative action in higher education for marginalised racial and ethnic groups is one of the few areas examined in this review where there is some evidence of positive impacts on future economic wellbeing. These conclusions are, however, based on a small number of cases and so strong conclusions cannot be drawn.

# 8. Marginalised castes and tribes

**Key findings from India**

Some quantitative analysis supports the idea that political reservations or Scheduled Caste and Scheduled Tribe (SC/ST) leads to social change and results in better services and poverty reduction for these groups but the case is not highly robust. Several studies suggest that impacts are greater where there is a greater degree of decentralisation and greater budget flexibility, and where relationships are less hierarchical. Some studies find greater multi-dimensional poverty reduction effects for ST than SC, possibly reflecting the concentration of ST in isolated rural areas with limited access to services.

There is considerable tension and politicisation around reservations for marginalised castes and tribes, as they are an important gateway to resources. Some studies suggest that they have reinforced social differences and done little to reduce day to day experience of discrimination, despite their positive impact on access to higher education, some forms of employment and political representation.

There is a vigorous debate as to whether reservations have been captured by the elite. Quantitative analysis shows that this is not the case, particularly since educational reservations apply only to young people with family income below a certain threshold. Furthermore, SC and ST members living close to the poverty line are vulnerable to slipping back into poverty and thus job reservations provide a degree of social protection.

Measures to enhance overall access to school education (such as mid-day meals, hostels for students from isolated rural areas) have been important in increasing ST and SC educational participation. Discriminatory attitudes continue to be major reasons for drop out but we found no evidence of campaigns to encourage change in attitudes and practice.

Reservations in higher education have been effective in increasing the participation of poorer ST and SC students; attainment gaps can making it challenging for 'reserved' students to pursue their chosen courses without additional support. An unexpected negative side-effect of these policies has been the displacement of women from higher castes.

An overview of studies concludes that affirmative action policies in public sector employment have presented a weak corrective to

discrimination but have not had much impact on occupational mobility. There is a case for extending them to the private sector and also for including asset redistribution, but this is politically controversial.

Although there are caste divisions in countries other than India, and in some countries, such as Nepal, policies exist to combat caste-based discrimination all the evidence on caste-based discrimination found for this review relates to India. Studies are relatively evenly distributed between the three focal themes: political reservations, education and labour markets. Responding to debates about elite capture of the benefits of anti-discrimination policies, and large-scale datasets amenable to quantitative analysis, there is stronger analysis of the impacts of affirmative action on poverty rates among Scheduled Castes (SCs) and Scheduled Tribes (STs) than for any other marginalised group examined in this report.

## 8.1 Political Reservations

There are many similarities in the nature of the evidence for SC/ST representation to that for women's reservations: much of the literature is based on quantitative analysis, with a few qualitative studies. The evidence is mixed: some does support the idea that SC/ST reservations create social change and result in better services and poverty reduction for SC/ST groups but the case is not highly robust. The same tensions over descriptive, symbolic and substantive representation are present. However, what is distinct is a greater tension over the naming and membership of categories. This is not picked up in the quantitative research but is highly significant when we explore qualitative evidence.

**Political reservations for SC/ST groups may be linked to reduced poverty, but the picture is mixed.** Prakash (2007) uses state-level panel data to argue that increasing ST representation significantly reduces rural and urban poverty whereas **increasing SC representation reduces urban poverty but has no impact on rural poverty.** He suggests it is the people just below the poverty line who are benefiting. By contrast, Chin and Prakash (2011) claim ST political reservations reduce national poverty rates. This effect is found to be more pronounced in rural than in urban areas, with the effect magnified following decentralisation. No impact is seen for SC reservations. The reasons for this are not fully explored, but it is noted that differential impacts of reservations for SC and ST groups are seen in other studies. The panel data used in this research only go up to the year 2000 and so may be rather dated.

In a rather more up-to-date analysis, Chaudhary (2015) present interesting quantitative research using the Multidimensional Poverty Index (MPI) for India **to link decentralisation and political reservations to better MPI outcomes for particular groups.** The research suggests that in the early days of reservations there was elite capture but the process of reserving seats for SC and ST groups has led to better outcomes for members of these groups. Some of the causality links in this article are rather under-explored.

Bardhan et al. (2005) use survey data on West Bengal to suggest that an SC/ST reservation weakly improves access for the poorest groups to the Integrated Rural Development Programme but not to employment guarantees. They suggest local revenue-raising is weakened but do not explore the reasons why this might be the case. They conclude **there is more room for action for SC/ST political representatives in contexts where relationships are less hierarchical.** This is a similar conclusion to that of Ban and Rao (2008) with respect to women.

Kaletski and Prakash (2014) analyse data from state and household surveys in 15 Indian states and find that, at the household level, ST reservation decreases incidence of child labour, while SC reservation increases the total number of children working. They claim their results survive a variety of robustness checks and explore potential explanations for the differential impact, including geographic isolation, caste fragmentation, support for the Congress Party and decentralisation of power.

Dunning and Nilekani (2013) find weak evidence that quotas result in policy shifts and suggest omitted variables often confound findings such as those in Prakash (2007). They claim **partisanship and party politics matter more than identity group.** This, they suggest, is supported by the fact that income differentials between SCs/STs and higher castes have not significantly decreased.

Thorat et al. (2016) examine the continued contentious nature of affirmative action policies for SCs/STs in India. They examine quantitative data from national statistics on the comparative poverty and asset ownership of SC/ST groups in relation to others and find that discrimination continues to shape their disadvantage. Their conclusion is that affirmative action policies in their current form (covering the public sector) have presented a weak corrective to discrimination but should be extended much further. **They also contend that reparation should be provided to discriminated-against groups in the form of asset reallocation.**

**Evidence on symbolic, substantive representation and leadership quality is very mixed.** Krishnan (2007) analyses village census data from nine Indian states aggregated to 65 districts and 610 electoral constituencies. He finds little evidence that ST legislators perform any differently to those selected from unreserved constituencies. However, SC legislators appear to perform better, providing greater access to educational facilities, in particular primary schools. However, Bardhan et al. (2008) compare reservations for women and SCs/STs and find in relation to women's reservations no improvement in any dimension of targeting for women and a worsening of intra-village targeting of some benefits to SC/ST groups. This is in contrast with the findings of Chattopadhyay and Duflo (2004), and is similar to some of the results of Besley et al. (2005) for South Indian states. However, they do find some positive effects of joint reservations of some leadership positions for SC/ST women.

Palaniswamy (2010) questions whether the formal powers of the president in the *panchayat* (the focal point of SC/ST/women reservations) translate into *de facto* power. He argues this may well depend on other factors, such as local power structures. Indeed, he claims evidence suggests presidents elected on reserved seats face considerable difficulties when they are working among representatives who come from powerful castes or belong to the local elite. This research uses a dataset from 80 *gram panchayats* and 225 villages in the state of Karnataka, to explore public goods provision and the targeting of household-level benefits under various anti-poverty programmes. The results suggest the president is not the sole decision-maker and the council is a broad-based body where the voices of other elected village representatives matter. They also claim the effectiveness of SC representatives depends on the caste of the president.

Further, Natraj (2011) suggests minority reserved candidates affect voter behaviour, reducing turnout, and in the processes he analyses, increase the share of votes for right wing parties.

As for the Indian evidence on reservations for women, we find that the qualitative evidence on SC/ST reservations adds another layer of complexity. In this case the contested and political nature of group labels is evident. Michelutti and Heath (2013) present a case study of the Yadavs and Dalits in northern India, exploring their political parties. Although both groups have benefited from affirmative action, this does not mean boundaries between them are reduced. They find conflict between them in competing for the benefits of affirmative action.

Middleton (2013) explores the politics of 'tribal' recognition, with insights into the logistical, political and epistemological difficulties of India's affirmative action system. This research considers the experience of government anthropologists themselves and shows the system is complex and contested. The tribal label is desirable as a potential gateway to resources, and has been strategically deployed in Meghalaya by some groups as a means of gaining control over certain resources, and excluding others from them (Karlsson, 2013).

Moodie (2013) examines the so-called 'creamy layer' in the SC/ST reservations system: 'those members of marginalized communities who have benefited sufficiently from affirmative action that they are no longer in need of, or entitled to, its benefits; they have "risen to the top" and need to be "skimmed off" (p.23). This raises considerable questions as to who is entitled to speak for whom and emphasises that group reservations can create intra-group inequalities. Moodie shows in ethnographic work with the Dhanka ST that assumptions that affirmative action could change the fortunes of the group are misplaced as those who rise in one generation can slip back in the next. This research is also interesting in terms of the dynamics of poverty. Moodie suggests affirmative action is still required even for those thought to have become part of the 'creamy layer', as the change in their condition may not be sustained in the next generation.

Rout and Patnaik (2013) present a qualitative investigation of *panchayat* SC/ST reservations in Orissa. They observe a vicious circle of disempowerment, where low participation by ST representatives is a consequence of their exclusion by the presidents and local elites. ST representatives were found to be enthusiastic about the *panchayat* and their constituency but were not made a part of decision-making. Their voices were often suppressed, and they were discouraged from becoming involved in *panchayat* affairs. In research examining the social effects of affirmative action on the relationship between Dalits and the dominant castes, Still (2013) also finds discrimination has been maintained despite the reservations. Using fieldwork in rural southern India, she shows how people use their knowledge of reservations to form opinions that shape behaviour in everyday life. Still suggests reservations have become used to vindicate upper-caste hostility towards Dalits. While discrimination on the basis of pollution has lessened, in its place reservations (combined with ideas about habits, morality, and cleanliness) have become the main route through which resentment is expressed. She finds the language of reservations has legitimated an upsurge of anti-Dalit feeling.

## 8.2 Education

### 8.2.1 Primary and secondary schooling

Though not intended as evaluations or overall assessments of affirmative action policies, studies from India provide some insights into the extent to which Education For All agendas have enhanced enrolment, retention or attainment among marginalised castes and tribes. Measures aimed at targeting the enrolment and attendance of poorer and disadvantaged groups include scholarships for SC/ ST children for post-primary education and residential hostels for girls and children from STs (Higham and Shah, 2011); more general measures include free textbooks, uniforms and midday meals (Sayed et al., 2007). Studies of these programmes typically draw on household survey or administrative data to examine changes in enrolment and, sometimes, educational outcomes; some, such as Sayed et al., combine these quantitative data with qualitative primary research observations.

Taken together, these programmes are likely to have contributed to the increase in the proportion of the relevant age cohort of the SC/ST population enrolled in primary education (gross enrolment ratios of 83% and 86%, respectively, in 2006, though this varied considerably across different states) and who are literate (up from 37% in 1991 to 55% 2001 for SCs and from 30% in 1991 to 47% in 2001 for STs (Kamat and Sedwal, 2008).[32] The studies do not discuss how far these increases are directly attributable to government- and NGO-led increased accessibility and demand-side measures, and how far to changing perceptions of the value of education (themselves influenced by well-publicised investment in education and by affirmative action in labour markets – see below). These studies also acknowledge significant dropout levels as a result of economic pressures, discrimination and continuing low levels of attainment (Bandhopadhay and Subrahmanian, 2008; Kamat and Sedwal, 2008), reflecting a greater policy emphasis on access than on quality.

Given that discriminatory attitudes and practices are widely documented as a significant reason for non-enrolment and dropout (Kamat and Sedwal, 2008), a surprising gap in the literature (and possibly practice) concerns the impact of concerted campaigns or training

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[32] These figures are rounded up from those presented in Kamat and Sedwal (2008).

initiatives to change teachers' attitudes and practice to educating the children of SCs/STs.

## 8.2.2. Higher education

India's affirmative action policies to redress caste-based inequalities in higher education have attracted the greatest volume of analysis of all the educational policies and initiatives examined. This reflects the longevity of the policies (they were implemented after independence for SCs/STs, harmonised across India's states in 1976 (Cassan, 2015a) and extended in the 1990s to include 'other backward castes'). The details of reservations vary from state to state, depending on its demographic make-up (Bertrand et al., 2008). The volume of literature also reflects availability of quantitative data derived from college records and from the National Sample Survey (NSS). These policies have been controversial – among those who consider them a weak measure that provides little redress for the structural disadvantages that marginalised castes face, those who consider them to disproportionately benefit better-off members of disadvantaged castes[33] and those who feel they discriminate against other economically disadvantaged groups whose access to higher education is no greater than that of SC members (Still, 2013).

Most studies find positive effects for SCs and STs. Bertrand et al. (2008), studying engineering colleges, find that reservations for disadvantaged castes[34] are well targeted and contribute to improved performance among these groups. Bagde, Epple and Taylor's (2012) study of a sub-sample of engineering colleges in one Indian state also found reservations had a significant and substantial positive effect, on both college attendance and first-year academic achievement. Desai and Kulkarni (2008) suggest the effects are different for STs than for SCs, and that STs are are more able to achieve parity in college graduation with upper-caste Hindus and others, possibly because their deprivation is more economically rooted and less related to discrimination.

Bertrand et al. (2008) also find a strong positive economic return to admission for lower-caste groups, though they are less likely ultimately to work in advanced technical occupations than their higher-caste peers. This suggests that – in this context – reservations may be playing a role in reducing poverty, particularly as – contrary to a common line of

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[33] This group is known as the 'creamy layer' in debates on affirmative action in India.
[34] In the colleges they studied, 7.5% of places were reserved for STs and 15% for SCs.

argument – it is not only the economically best-off sections of disadvantaged castes who are accessing higher education as a result of these reservations (as also demonstrated by Thorat et al., 2016). This may be in part because better-off members of disadvantaged castes perceive applying to higher education under admissions quotas as stigmatising (Gille, 2012). However, in a later paper, Bertrand et al (2010) find women may lose out as disproportionately. While women comprise 23% of people displaced by the reservation policy, they comprise only 16% of the 'displacers', an unexpected effect that works counter to efforts to get more girls and women studying and working in STEM (science, technology, engineering and mathematics) areas.

However, Frisancho Robles and Krishna's (2012) study of an engineering college suggests reservations lead to students taking subjects for which they are not necessarily best qualified: as a result, students from discriminated-against castes admitted under reservation policies fail to catch up with their peers who have been admitted through open competition and end up earning less than they would have if they had picked less selective major courses of study. Desai and Kulkarni (2008) find mild deterioration in college graduation rates for SCs, casting doubt on the effectiveness of affirmative action policies that facilitate admission but provide little other support for targeted groups. Kochar (2009), also examining data for a prestigious engineering college in Maharashtra, likewise concludes that

'A weakening of the affirmative action policies which place reserved category students in colleges that they are ill-qualified for would improve outcomes for students of all castes. This is because all students are hurt by the variance in ability within a program that the current system generates. Students at both ends of the academic distribution are also hurt by the reduction in mean student ability; even weak students would do better if they were placed in classes where the difference between their ability and the classroom mean were not so large.' (p27)

She also argues that a more effective way to address educational inequalities would be to focus on earlier levels of schooling since considerably fewer SC and ST students complete secondary school as compared with upper castes.[35]

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[35] For example, in urban Maharashtra, the state of focus in Kochar's (2009) study, data from the 2004 National Sample Survey reveal that only 27% of SC and ST students aged 18–25 completed higher secondary school (Grade 12) compared with 43% from the upper castes.

Also emphasising the role of broader structural inequalities in limiting both Dalits' educational achievement and subsequent opportunities, Jeffrey et al. (2004) highlight the disconnect between Dalit men's aspirations and the education level they are able to achieve (in part as a result of attending relatively poor-quality government schools and missing out, because of corruption, on the scholarships they were due). This, in turn, limits the possibilities available to them in labour markets, where they lack the social connections and ability to bribe to secure government jobs, and where better private sector jobs are often not available because they have lesser competence in English and other skills; many have been forced to return to manual labour in their villages, showing education can be a route to social mobility only if it is accompanied by greater structural change.

Bertrand et al. (2008) find no quantitative evidence that being displaced as a result of affirmative action leads to more negative attitudes towards affirmative action or to lower castes, and some weak evidence that being admitted to higher education under a reservation policy leads to more positive attitudes towards affirmative action. However, caution is needed, as there is a vociferous debate on the effectiveness and justice of affirmative action policies and some qualitative evidence that affirmative action policies are perceived as unfairly advantaging the economically better-off members of disadvantaged castes (Still, 2013).

Another set of studies considers the combined effects of reservations in higher education and policies promoting universal primary and secondary schooling and in labour markets on overall education levels among disadvantaged castes. Using a nationally representative dataset (the National Sample Survey), Desai and Kulkarni (2008) show that educational inequalities have declined over time for SCs and STs (who benefit from reservations), but not for Muslims, who are educationally disadvantaged but do not benefit from the current reservation policy (Khanna, 2015). This is one of the few studies we found for this review which included members of marginalised religious communities.

Khanna finds the effects of affirmative action are greater in states with higher 'intensity' of reservations, and the bulk of the impact does not accrue to the economic elite within disadvantaged castes (the 'creamy layer'). Overall, Khanna (2015) suggests reservations in higher education and in the labour market have led to an increase of about 2.2 to 3 years of high school education for students in SCs, which can mean transitioning between levels of education (primary to secondary school, secondary school to college).

Desai and Kulkarni (2008) and Heyer and Jalal (2009) support these findings, arguing that employment reservations incentivise investments in education. Cassan's (2015a, 2015b) analysis finds a less strong effect – that affirmative action leads to an average of 0.3 years additional participation in education. Furthermore, Cassan (2011) argues that these accrue almost entirely to boys and men, and that these policies have had no effect on increasing enrolment or attainment among girls. He also finds the benefits accrue mainly to people in urban areas and in secondary schooling (ibid.).

Khanna (2015) warns that reservations may disincentivise education as well. Different government jobs have different educational requirements. For jobs that require only primary schooling, a student may be encouraged to drop out as soon as they finish primary rather than continuing (ibid.). This is consistent with findings from Brazil, which suggest affirmative action is associated with lower human capital development among targeted groups (Assuncao and Ferman, 2013, in Khanna, 2015), though other studies do not find this effect in Brazil (Francis and Tannuri-Pianto, 2012).

## 8.3 Labour markets

Affirmative action policies for STs and SCs and in some cases Other Backward Castes (OBCs),[36] also known as the reservation policy, involves quotas for participation in civil service, public companies, statutory bodies and voluntary agencies. The policy was incorporated into the Indian Constitution in 1950 and combines legal safeguards against discrimination with proactive affirmative action (Thorat, 2007). Reservation percentages correspond to the demographics of the local population. For example, in Andhra Pradesh 25% of educational institutes and government jobs are reserved for OBCs, 15% for SCs, 6% for STs and 4% for Muslims. In Tamil Nadu, the reservation is 18% for SCs and 1% for STs. These labour market-based reservations are complemented by measures in the education and political systems discussed elsewhere in this paper.

This section examines the impact of reservation on the number of SCs/STs in public sector positions, then considers the evidence on broader income and economic well-being measures before looking at

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[36] The reservation for OBC was not introduced until 1993 and is more controversial; those of the highest socioeconomic status within the OBC are excluded from the policy.

whether the policy is reaching the most marginalised, criticisms and current suggestions for its development. We located surprisingly little literature that looked at impact on economic well-being or poverty reduction and nothing on implementation or any of the complementary measures in place to assist SCs/STs to access reserved employment positions.

## Employment outcomes

There is agreement in the literature that the reservation policy has slowly increased the proportion of SCs/STs in public sector employment (Heyer and Jayal, 2009; Thorat, 2006, 2007; Xaxa, 2001). Thorat (2006) claims the absolute number of SC government employees increased from 218,000 in 1950 to 641,000 in 1991, falling to 540,000 in 2003 because of government contractions. The number of ST employees increased from 38,000 in 1960 to 211,000 in 2003.

Within government, the Department of Personnel and Training is tasked with monitoring, enforcing and modifying the rules. Alongside this, each ministry has specific personnel tasked with ensuring the reservation policy is implemented. The independent National Commission for Scheduled Castes and Scheduled Tribes functions as a civil court to deal with reports of discrimination or violation (Thorat, 2007). We did not locate any studies for this review that examined how effective these mechanisms are and how they function.

We located surprisingly little literature that looks at impact on broader levels of employment or economic well-being. Table 5 presents those we did locate. These studies show broadly positive impacts on employment levels and illuminate a clear link between better education and better labour market prospects.

**Table 5: Economic impacts of reservations for SCs/STs and OBCs**

| Study | Type of data | Outcomes |
|---|---|---|
| Borooah et al. (2007) The effectiveness of jobs reservation: Caste, religion and economic status in India | Employment data from the 55th NSS from 2000. Constructs a comparison of the experiences of ST sand SCs compared with OBCs using a multinomial logit model and the Oaxaca Blinder technique to look for explained and unexplained differences. The analysis does not make any distinction between private and public sector roles. | Raised number of STs and SCs in salaried employment but they still take up a lower proportion then forward-caste Hindu men <br> Discrimination bias against Muslims who do not benefit from the policy <br> Strong relationship between education and level of employment. Literacy increased the probability of being in formal waged employment |
| Prakash (2009) The impact of employment quotas on the economic lives of disadvantaged minorities in India | Data from NSS rounds in 1983, 1987, 1993 and 1999 and policy variables from the SC and ST annual commissioner's report. | Significant increase in likelihood of a SC having a salaried job <br> Increase in household consumption and children attending school (for everyone or those with job) <br> Decreased incidence of child labour <br> Less effect among STs |
| Bertrand et al. (2008) Affirmative action in education evidence from engineering college admissions | Survey with individuals who applied to engineering colleges in one state in 1996 and are followed up in 2004 and 2006. | College attendance <br> Increases lower-caste members' monthly income by between Rs 3,700 and 6,200 <br> Lower-caste group: those from higher socioeconomic backgrounds benefit most <br> Reported job quality increases but not to match that experienced by upper-caste group members |

We located only one study that looked at well-being outcomes beyond the individuals concerned. Van den Berg et al. (2010) use regression discontinuity analysis of data from the National Family and Health Survey 2005/06 to show a significant positive effect of the policy on under-five mortality of OBC children, with gains larger for female than for male children.

## Reach of reservations to the most marginalised

Gains in employment in the public sector have undoubtedly been made, but have not always extended to the highest levels of employment, and ST/SC roles remain concentrated in Class III and IV jobs such as janitors and clerical staff (Thorat, 2007). The high number of SCs who are employed as janitors, an occupation traditionally associated with SCs, suggests that the policy has made little contribution to occupational desegregation (Heyer and Jayal, 2009).

Table 6: SCs in central government posts by category (%)

| Category | I | II | III | IV | All |
|---|---|---|---|---|---|
| 1965 | 1.64 | 2.82 | 8.88 | 17.8 | 13.2 |
| 1995 | 10.1 | 12.7 | 16.2 | 21.3 | 17.4 |
| 2001 | 11.4 | 12.8 | 16.3 | 17.9 | 16.4 |

Source: Heyer and Jayal (2009), using data from NCSCST (1998) and Planning Commission (2005).

Concerns are also expressed as to whether quotas are reaching the most disadvantaged within OBCs and whether the advantages gained have extended inter-generationally to create a small middle-class elite that benefits disproportionally (Jeffrey et al., 2005). This is the 'creamy layer' problem we have already highlighted, a term that has appeared in several Supreme Court judgements (Desai and Kulkarni, 2008). Legislation is now in place to try to prevent this. For example, the sons and daughters of Class I and II government officials and those whose families have an income of more than Rs 100,000 a year are officially excluded from the reservation system.

Moodie (2013) presents an interesting perspective on this problem, citing a 2002 ethnographic study of the Dhanka ST in Rajasthan. Among this group she found, rather than a 'creamy layer', a number of 'creamy individuals.' In a context of decreasing numbers of government jobs, there is a growing sense of alienation among Dhanka youth and a fear that the community will not be able to sustain the gains made. As such, these 'creamy individuals' are highly valued because of their ability to give back to the community and advocate on their behalf for resources.

Over time, the groups included in the reservation policy and the quota amounts have changed – for example with the inclusion of sections of OBCs in 1993. There is demand from some groups to extend reservations to Muslim members of OBCs (Borooah et al., 2007) and

women who are socially or economically disadvantaged (Chattopadhyay and Duflo, 2004).

## Reservations in the private sector

There is also a literature on the suggestion of extending reservations into the private sector, as this is where more than 90% of the SC/ST workforce is located and where they contend with a lack of protection and discriminatory practices (Thorat, 2007; Madheswaran and Attewell, 2007).[37] This policy seems to have been rejected by business owners. For example, Jodhka and Newman (2007) interviewed 25 human resource managers in large firms in New Delhi and not one expressed any support for reservations in the private sector. They believe that meritocracy is enough and the employment system is fair:

> 'If a person is capable enough, he or she doesn't need reservations. There are enough jobs in the market; one can easily achieve what he wants' (Palin, human resource manager for 15 years). (p.4130).

The view was also expressed that the education system needs to improve to enable SCs/STs to access higher quality employment:

> 'We do not support reservation. Productivity will suffer and the company will suffer. The scheduled cases should be given opportunities in education and after that, they should compete on their own' (human resource manager, shoe company). (p.4130).

For this review, we also located one study that looks at the importance of factors outside the reservations themselves to labour market outcomes. Deshpande and Newman (2007) explore caste differences in university students' aspirations of and expectations from the labour market. They administered questionnaires to a sample of 173 university students from varied caste backgrounds in 2005 and 2006; nearly 28% of respondents were reserved category students. They found reservation students had lower expectations – with an expected monthly salary of Rs 19,510, while non-reserved students expected to earn about Rs 24,470; 45% of reservation students viewed an ideal career as in the public sector compared with 12% of non-reservation students, who were more likely to report a desire for a corporate sector role. Reservation students were also much less likely to report that they would use family

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[37] For further discussion on quotas in the private sector, see Thorat (2004a, 2004b), in Debroy and Babu (2004).

contacts to look for work, suggesting their smaller networks give less access to highly skilled private sector roles.

## 8.4 Conclusions

Taken together the evidence on the impact of political reservations for scheduled castes and tribes suggests a weak impact on economic poverty among these groups. By contrast, measures to enhance educational opportunities have been relatively more successful, though discriminatory attitudes and practices within schools continue to undermine children's educational experience and are important factors contributing to early drop out. At higher education level, there is some evidence that caste reservations have both increased the representation of scheduled castes and tribes and contributed to enhanced economic wellbeing among beneficiaries of these reservations, though they continue to lag behind dominant castes. Two studies question the value of reservations without additional support given deficiencies in the school system which mean that students from marginalised castes and tribes are often underprepared for higher education and impact on their attainment.

There is a consensus in the studies reviewed that reservations have led to increased public sector employment among scheduled castes and tribes, which has had a positive overall impact on incomes, though these groups are still disproportionately concentrated at the lower levels of government service. One study also suggests a positive impact on the health of scheduled caste and tribe children resulting from these reservations. The absence of any such reservations in the private sector means that the vast majority of the labour market is not covered by affirmative action provisions.

# 9. Neglected groups

We found very few studies of efforts to reduce discrimination against refugees, migrants, people with limited citizenship rights, people with stigmatising health conditions, including mental health problems, or people with non-heteronormative sexual identities. This may be because such initiatives are generally small-scale and initiated by NGOs, and thus did not meet the inclusion criteria for this review.[38] However, the lack of evidence also indicates that the discrimination faced by these groups is a low priority in most societies. Indeed, rather than finding evidence of efforts to combat discrimination, many of the studies we found discussed rising discrimination, particularly against migrants and people with stigmatised sexual and gender orientations.

Some reviews, such as Shanker et al. (2015), touch on approaches to promote refugee and displaced children's education, such as enrolment campaigns and provision of some financial support and extra classes for Syrian refugee children in Iraq, Jordan and Lebanon. Kirk (2009) highlights the importance of alternative or temporary schooling for displaced children dovetailing with mainstream education systems (a broader point widely recognised in relation to non-formal education). However, we found no consolidated reviews or high-quality impact studies related to promoting education for this group of children.

Our searches also did not generate any evidence of efforts to combat age-based discrimination faced by older people. This is likely to reflect the thematic foci of the research, though we might have expected some discussion of age discrimination in labour markets.

Discrimination against minority religious groups was also mentioned only in passing and was not the subject of focused study. This may reflect the lack of affirmative action measures on the basis of religion. Several studies from India argue for extending affirmative action to cover to economically and socially disadvantaged Muslims, who do not benefit from caste- and tribe-based measures.

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[38] For example, we did not include a study of a randomised controlled trial of open, distance and flexible learning for children affected by HIV/AIDS, which included in-school support aimed at reducing the discrimination they faced, as it was a small-scale project with approximately 1,500 beneficiaries in Malawi and a similar number in Lesotho (Jere, 2012; Nyabanyaba, 2010).

# 10. Conclusions

## 10.1 How effective are anti-discrimination policies and programmes?

We discuss the evidence for different social groups in turn. Because the main sites that different groups experience discrimination differ (eg discrimination against girls or people with disabilities takes place both within the household and wider society, discrimination against marginalised racial or ethnic groups and castes primarily takes place within wider society), affirmative action measures may need to be tailored accordingly, and thus differ for different groups. Because many marginalised people face discrimination on the basis of multiple aspects of their identity, affirmative action measures that focus on one aspect – as most do – can be crude. Furthermore, some anti-discrimination measures (eg affirmative action for marginalised castes) have a much longer history, and there are both quantiative and qualitative studies examining their impact. This means that we cannot draw conclusions that anti-discrimination and affirmative action measures are more effective for some groups than others. However, as Table 7 below shows, this review has been able to synthesise the availabililty of evidence concerning the impacts of anti-discrimination and affirmative action measures on different groups.

**Table 7: Summary of Findings**

| Social Group | Interventions | Extent of Evidence and Impacts |
|---|---|---|
| Women | Political reservations and quotas | Extensive evidence from India (>10 studies); also evidence from Latin America and Africa. Successful in increasing numbers; evidence of transformative change less clear |
| | Affirmative action in higher education | Moderate amount of evidence from East Africa (<10); Effective at increasing numbers |
| | Affirmative action in labour markets | Very limited evidence |
| Girls | Cash transfers to increase school enrolment | Extensive systematic review evidence (> 10 studis). Positive impacts on enrolment; mixed evidence on learning |
| | Attitude and behaviour change campaigns | Few studies (<5); Clear positive impacts |
| | Increase schools' gender-sensitivity | Few studies (<5); positive impacts on attendance and learning |
| | Vocational training for adolescent girls | Moderate number of studies (<10); mixed impacts |
| Children | Investments and cash transfers to increase access to mainstream schooling | Extensive evidence (> 10 studies); positive effects |
| | Alternative basic education | Moderate number of studies (<10); overall positive effects |
| Young People | Youth political reservations and quotas | Very little evidence (1 study) |
| | Vocational training for disadvantaged youth | Moderate number of studies (<10); mixed but broadly positive impacts |
| | Affirmative action in higher education | Moderate number of studies (<10); increase in numbers but mixed evidence on poor |
| Disabled People | Political reservations | Very little evidence (1 study) |
| | Inclusive education policies in schools | Moderate number of studies (<10); mixed impacts |
| | Affirmative action in higher education | Few studies (<5); positive impacts |
| | Labour market quotas | Very little evidence (2 studies); limited impacts |
| | Attitude change campaigns (employers and wider society) | No evidence |

| | | |
|---|---|---|
| Marginalised Racial and Ethnic Groups | Political reservations | Few studies (<5); mixed impacts |
| | Increased funding and financial assistance for schools and students from marginalised groups/ areas | Few studies (<5); broadly positive impacts despite challenges |
| | Bilingual/ mother language teaching in primary schools | Moderate number of studies (<10); positive impact in most cases |
| | Bilingual/ mother language teaching in secondary schools | No evidence |
| | Reservations in higher education | Moderate number of studies (<5); broadly positive impacts |
| | Labour market reservations & asset redistribution (shares) | Limited evidence (<5 studies); mixed impacts |
| Marginalised Castes (India) | Political reservations | Effective in increasing numbers: some evidence of impacts on income poverty and community development |
| | Investments in education system; additional funding for marginalised castes | Increase in enrolment; discriminatory practices still major cause of drop out |
| | Attitude change campaigns (schools and society) | No evidence |
| | Reservations in higher education | Positive impact on numbers represented and post-graduation income |
| | Labour market reservations | Positive impact on incomes but little impact on occupational mobility; have not facilitated escape from poverty |
| | General | Reservations are widespread, affect significant numbers of the population and have led to considerable backlash |
| Other Marginalised Groups | Attitude change campaigns (HIV and leprosy) | Small amount of evidence; some success |
| | Political reservations | No evidence |
| | Programmes to boost educational inclusion | No evidence |
| | Programmes to boost labour market inclusion | No evidence |

## Gender discrimination

Our review found the greatest number of examples of gender-based affirmative action – which has been common in the political arena and in both school and higher education but appears much less so in labour markets, beyond vocational training programmes for adolescent girls and young women. In both the political arena and education, affirmative action measures have had some success in enhancing the numerical representation of women and girls. In education, in some regions (East Asia, Latin America), gender disparities in attendance and achievement have been significantly reduced or even reversed and in much of the world anti-discrimination measures have considerably enhanced girls' access to education, though embedded discriminatory practices in teaching and school management remain.

It is less clear that political representation is necessarily associated with policy change that benefits women and girls, as women representatives may consider their primary loyalties to party, region or ethnic group; particularly at local some women in position through reservations are vulnerable to pressures to represent the interests of local power holders. That said, some women MPs in East Africa have been able to introduce legislation on issues such as domestic violence, child abuse and child marriage.

We found no evidence of large-scale affirmative action to address forms of gender discrimination that disproportionately affect boys or men. These often involve intersecting identities, such as discrimianaion in labour markets against young men from stigmatised slum locations.

## Children and young people

The vast majority of evidence on children and youth relates to the impacts of affirmative action and inclusion policies on school education, higher education and youth training. These studies primarily show positive effects. Gains in school education reflect a combination of investment in enhancing quality and accessibility for all and targeted measures to enhance the participation and/or learning of specific groups, such as cash transfers, reforms to language of instruction and efforts to promote the inclusion of disabled children. Gains in higher education and training are typically much more closely targeted at specific groups perceived as disadvantaged.

At primary and secondary school level, there is evidence that affirmative action policies have been successful in increasing participation and learning among targeted groups. The evidence base is strongest for girls, partial for speakers of non-dominant/non-national languages and most limited for disabled children. There is a notable gap in large-scale evidence for refugee and displaced children, children affected by HIV/AIDS and other, smaller, discriminated against social groups. There is also some evidence from India that, in combination with measures to promote scheduled castes' and tribes' political representation and access to labour markets, a package of measures to promote marginalised children's access to education has had positive impacts. Qualitative evidence does, however, suggest gains in access have not necessarily been matched with a shift to less discriminatory school experience and this continues to be off-putting for many children.

We did not find any studies that related gains in the labour market position of a marginalised group with well-being gains for the children and young people of that group. Linkages are plausible but seem not to have been a focus of the literature. Two studies from India suggest that women's political representation may be associated with better outcomes for children, but this is a small basis on which to draw conclusions. The impacts of other examples of pro-child legislation introduced by women legislators (eg in Rwanda and Tanzania) have not been systematically assessed.

## People with disabilities

Apart from inclusive education policies that focus on children with disabilities (but for which commitment to and quality of implementation vary considerably), and a few examples of anti-discrimination measures in employment law, we found very limited evidence of other affirmative action policies to reduce discrimination against disabled people. We found some evidence that inclusive education inititaives in schools and higher education had led to changes of students' attitudes, mixed evidence concerning the impact of training on teachers' attitudes and mixed evidence of outcomes for children and young people with disabilities. Most studies concentrate on the barriers to implementation of inclusive education policies, and conclude that impacts are limited because of limited implementation.

## Marginalised racial and ethnic groups

The review found fewer studies of race- or ethnicity-based affirmative action than expected. Apart from Brazil, where affirmative action measures are directed to a large, excluded minority (Afro-Brazilians) and Vietnam, towards small, isolated and poor ethnic minorities, the strongest evidence concerning race-based affirmative action in education and labour markets comes from contexts where a racial majority has historically been marginalised, economically (Malaysia) and economically and politically (South Africa). Employment-related affirmative action has been considerably more effective at reducing poverty in Malaysia than South Africa, where it has primarily benefited a Black elite. Studies from Latin America, Cambodia and India explore the value of mother language or bilingual education in the early grades of primary school and find positive effects on children's educational achievement in most cases. Race-based affirmative action in higher education appear to have benefited poorer groups in Brazil, and to have contributed to poverty reduction in Malaysia but there is little disaggregated evidence from other countries. Political reservations on grounds of race or ethnicity are rare, and appear to have had little impact; there are also concerns that race- or ethnicity-based reservations can make racial and ethnic labels more, not less significant, and lead to increased racism.

## Marginalised castes

Taken together the literature reviewed indicates that reservations in higher education and governance structures have led to greater representation of these groups. Political representation of scheduled castes and tribes has had some (relatively weak) impacts on poverty and service provision for these groups; much depends on party affiliation and representatives' room for manouevre. Both educational and employment measures have contributed to increased incomes. However, concerns about continuing discrimination in schools, the under-preparedness of some students from marginalised castes in higher education, and the concentration of marginalised castes in lower level public sector jobs, and the absence of impact on the private sector remain.

## Other groups

We found no evidence of antidiscrimination laws or policies being used to advance the political, educational or labour rights or combat discrimination against refugees, migrants, LGBTQ people, older people or other social groups. There is some evidence in the literature of successful attitude change and reduction of stigma through communication campaigns around HIV/AIDS and leprosy, pointing to the potential of such campaigns to reduce discrimination against other social groups.

## Unintended negative impacts

Unintended negative impacts are an under-researched topic. From this review it is clear that there have been a number of unintended consequences. The evidence on this relates particularly to India where affirmative action policies have a long history, are extensive and relate to a number of spheres of social life. Studies from India have found resentment among economically poor members of non-scheduled castes based on suspicions that caste-based reservations benefit those who are not economically disadvantaged. This can lead to intensified discrimination in social interaction. However, as we have shown, educational and job reservations for better-off members of marginalised castes have been limited by law.

There is also tentative evidence that while caste-based affirmative action policies in India have been generally been economically progressive they have been regressive in terms of gender equality. Studies of the impacts of caste-based quotas in higher education indicate that a smaller proportion of the students who benefit are women; also a higher proportion of the students displaced by such reservations are women. This again implies the need for more nuanced measures that address multiple forms of discrimination simultaneously – for example, reservations for SC and ST women.

There is emerging evidence (again from India and Nepal) of designated status such as 'indigenous' or 'tribal' constituting a political resource, with some so-designated groups fighting hard not to allow the rights and privileges associated with this status to be extended to other groups. More broadly, designating certain groups as beneficiaries of affirmative action, can increase the significance of those social divisions, rather than reducing them.

## 10.2 Have anti-discrimination policies contributed to poverty reduction?

**There is positive evidence of an impact on both income and multi-dimensional forms of poverty.** The limited overall size of the evidence base should not obscure this finding. There is evidence that employment reservations in India have had positive impacts on income and consumption and clear evidence that employment of marginalised castes and tribes, and racial groups, particularly in the public sector, has increased in India, South Africa and Malaysia. There is however, little evidence to suggest that they have contributed to occupational mobility, with some indication from India that even with job reservations, scheduled castes continue to be over-represented among occupations traditionally associated with their castes, such as janitors and cleaning. Furthermore, training schemes targeted at disadvantaged youth (specifically poor urban young women in Latin America) have mostly had a positive impact on employment and wage rates. India's experience also raises the issue of how long affirmative actions policies are needed in order to achieve lasting change, and to avoid marginalised groups slipping back to similar or worse positions as before policies were in place.

Our study found a reasonable body of evidence suggesting that anti-discrimination measures often enhance the lives of poor and marginalised people, but limited evidence concerning the poorest people. This is largely because relatively few disaggregate studies between members of the targeted groups to this degree of granularity. Few use a 'poverty lens' at all and those that do, typically only disaggregate between poor and non-poor. None explicitly considered the impact on extremely poor or chronically poor people. Furthermore, most studies look at the immediate impacts and do not consider other, longer-run, consequences. This is particularly the case for education, where the time lag between the impacts of a policy and impacts on income poverty status (even using multidimensional measures) is likely to be longer.

The strongest evidence of impact on poor, marginalised people's lives emerges from analysis of labour market policies, where there is some evidence that reservations have helped memmbers of marginalised castes (India) and racial groups (Malaysia) escape from poverty. In both cases, labour market reservations have been supported by education policies that have enhanced specified groups access to education and may have also encouraged parents to invest in education. There is also positive evidence ( from India and Malaysia) concerning the impact of reservation

policies in higher education on marginalised groups' subsequent economic well-being.

There is also more tentative evidence from India to suggest that political reservations for women and marginalised castes have contributed somewhat to improved service delivery and infrastructure in local communities, and may lead to improved nutrition among children in areas with women leaders. The studies examined do not specify whether these gains have accrued across the socio-economic spectrum or whether they have been captured by certain groups.

There is no one 'magic' bullet to reducing poverty through reducing discrimination and actions in the political arena, labour markets and education all have their part to play. This said, there is evidence for the strategic value of investing in education with a strong inclusive agenda: first, higher quality and more accessible education and training strengthens marginalized groups' position when entering labour markets – they are more likely to be qualified for better-paying and more secure employment. Second, education is an important site for changing discriminatory norms and attitudes, as has been well documented with respect to gender equality. Improving marginalized groups' educational opportunities at primary and secondary school is also important in facilitating access to higher education (where financial returns are often highest). Third, it is also plausible that investment in education may contribute to increasing marginalised groups' political representation, and thus may be a long route towards less discriminatory and more inclusive societies. However, further investigation of such linkages is needed.

**Do affirmative action policies reach poorer groups?** Despite concerns about elite capture and a perception to the contrary, the majority of evidence from India shows that in fact, affirmative action policies for marginalised castes and tribes have generally disproportionately benefited economically disadvantaged members of those groups. In response to concerns that reservation policies are creating an elite with scheduled castes and tribes (a 'creamy layer'), measures have been put in place to bar the best-off members of marginalised caste groups from preferential access to employment. Together with a perceived stigma of benefiting from affirmative action, among higher income groups, these measures are likely to reinforce the observed pattern that affirmative action measures benefit poor groups. There is also some evidence to suggest that race-based quotas in higher

education in Brazil benefit poorer groups, though this is based on a study of one university.

Policies that provide additional resources (rather than outlawing discrimination or providing for political reservations) to poor members of marginalized groups unsurprisingly have clear positive impacts on both poverty and identity-based disadvantage. For example, there is considerable evidence that targeted financial support to enable girls or ethnic minority children to attend school has been effective, as have some training programmes for poor adolescent girls and marginalized young people.

## 10.3 What is known about effective design of anti-discrimination interventions?

In this sub-section we synthesise the evidence emerging from our review concerning the design of targeted interventions. We focus here on measures other than the law, which is discussed in 10.4. A number of important issues are little discussed in the studies examined and we highlight these here.

An important issue is whether anti-discrimination interventions have greater impacts on reducing poverty and discrimination if **multiple approaches** are in place at the same time. Referring back to the conceptual framework for the study, reducing discrimination requires supportive legal change, specific redress measures, such as targeted reservations and quotas, broad social investment and financial support and attitude and behaviour change. It is plausible that initiatives that involve action in all four spheres would have the greatest likelihood of success in combating discrimination and reducing.

No studies we examined explored this directly, though lessons can be drawn from efforts to promote gender equality in education. Here a combination of policies to universalize education, investment in increasing the availability and quality of education provision, financial incentives to families and attitude change campaigns have all been necessary. Action to change attitudes has focused both on families and on teachers through, for example, teacher training to promote gender-sensitive management of classes and to change stereotypes that portray girls as less capable than boys at maths and science. Likewise, more effective eradication of discrimination against disabled people may require more concerted campaigns to change employers' attitudes to

disabled people are needed alongside laws making discrimination illegal and quotas or targets for disabled employees, as employers' attitudes continue to be a major obstacle to disabled people's employment prospects. By contrast where affirmative action measures, such as quotas in higher education are put in place without more systemic investment in the groups concerned, they are more likely to bypass disadvantaged members of these groups. For example, quotas for disabled people in higher education in East Africa are typically reaching better-of members of these groups, as poorer children, and particularly disabled children struggle to continue to secondary school, with high levels of drop out in the early grades.

The review uncovered no systematic analysis of **how long anti-discrimination measures need to be in place to effect major change,** probably because this is very context-specific. Given the review's focus on large-scale government programmes, many of which are both long-standing and ongoing, there is clear evidence concerning the effects of policies over time, and on changing the fortunes of whole cohorts. For example, anti-discrimination policies in India and affirmative action policies in Malaysia have been in place for decades, and have achieved considerable change over that period, evolving as necessary to reflect changing patterns of discrimination, though caste discrimination in India continues to be widespread. (This may reflect too little emphasis on changing attitudes alongside more structural measures to enhance the opportunities of marginalised groups.) There are also examples of medium-term programmes that have had more limited effects, such as efforts to equalize educational and labour market opportunities in South Africa – this points to the entrenched nature of discrimination and unequal opportunities, and the complexity of change.

Our study found examples of more rapid change, such as the major increase in girls' primary and secondary school enrolment and completion in the past fifteen years, and the positive effects of vocational training programmes focused on marginalised young people, which typically achieve increases in employment and higher wages for alumni after courses of three to six months. Evaluations of these training programmes have typically been conducted one year after graduation – there is no evidence concerning legacy effects. Likewise, most studies of increased school attendance among marginalised groups do not examine whether this has been sustained and contributed to improved school completion rates.

With respect to all these 'success stories', it is very important to note that all have taken place in **a positive economic context.** It is likely that in less buoyant economic conditions, when competition for educational, labour market and political opportunities is greater, affirmative action policies may evoke more resentment and may prove too limited to underpin major change in systemic inequalities. Indeed, a s**upportive political and economic context, adequate resourcing and simultaneous efforts to change attitudes and provide opportunities** are critical.

**Type of change.** It may be that changes such as increasing marginalized groups' school enrolment, where no one stands to lose are easier to achieve more rapidly than reduced discrimination in labour markets or political representation, where non-marginalised groups are more likely to perceive that they are losing out. This also helps explain why affirmative action in higher education has been much more controversial than broader social investment in schools – here advantaged groups perceive that affirmative action reduces their own opportunities in higher education.[39]

One major evidence gap is the **cost-effectiveness** of different anti-discrimination interventions. The only two interventions for which we found any discussion of cost-effectiveness were bilingual and/ or mother tongue education, and alternative basic education. The studies examined reported evidence from Mali that bilingual primary education is ultimately more cost-effective than teaching in a foreign language, in this case, French, given the extent of repetition and dropout associated with low levels of learning. They also highlighted ways of reducing the costs of introducing mother tongue education, through the use of shellbooks (book templates where content can be added in different languages and then printed). Our review did not find any systematic analysis of the relative costs of alternative basic education compared with regular government provision, though one of the key reviews we drew upon suggests that alternative basic education is not necessarily more costly, despite perceptions that this is generally the case. In this case, the most cost-effective approach will depend on locally specific programme design features.

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[39] This is consistent with recent work in behavioural science suggesting that people are more motivated to avoid losses than they are to maximise gains (eg GCN and COI, 2009).

## 10.4 What is known about supportive contexts for effective affirmative action?

Many of the studies examined in this review did not discuss the political and social context of the implementation of anti-discrimination laws and policies in any depth. However, from the studies that did explore these issues the following insights arise: a supportive political and institutional context matters – in a political environment supportive of social justice and ending social inequalities, affirmative action programmes are much more likely to be proposed, resourced, and implemented and violations reported. In such contexts, officials are also more likely to have incentives to implement affirmative action policies or to face sanction if they do not.

The effectiveness of anti-discrimination laws depends considerably on there being an effective legal system in place. For poor people from discriminated-against groups, additional factors include the accessibility of the justice system: financially, physically and socially – for example, minorities who do not speak national languages may be unable to access the justice system. Effective policy also depends on adequate resourcing for a range of actions to combat discrimination – broader social investments that reach all groups, targeted programmes to reach specific groups facing discrimination, and financing to enable discriminated-groups to seek redress.

Secondly, our analysis suggests that often there has been much more traction where the marginalised group is numerically significant, as in the case of marginalised racial majority groups, and marginalised castes in India. We found no studies that discussed minimum levels of representation above which discrimination is reduced because the presence of a marginalized group becomes significant and normal, rather than exceptional. Some studies of women's representation in male-dominated fields in OECD countries suggest that above a threshold of around 30%, women's presence is normalized and discrimination considerably reduces. Currently, some marginalised groups, such as people with disabilities are so under-represented in employment that there is very little impact on employer attitudes.

Thirdly, such evidence as exists on the impact of civil society and social movements (largely in relation to affirmative action for women, but also in relation to caste discrimination in India) suggests that they play a major role in driving change and ensuring government accountability. This implies a role for solidarity and mutually reinforcing

action between social movements; it also highlights the importance of democratic space for social movements.

Fourthly, donor influence has sometimes contributed to the adoption of anti-discrimination policies, but where there is little support in political or civil society, such measures can primarily be window-dressing without serious intentions of implementation. They can also evoke backlash if they are perceived as donor priorities out of step with local culture. This said, dominant groups have an interest in undermining affirmative action measures that dislodge their privileged position, and may claim policies are donor-imposed when in fact they have strong support of discriminated-against groups.

Finally, effective affirmative action policies and programmes have often been aided by a buoyant economic context that has led to an expansion of opportunities for both marginalised and less marginalised groups, and increased the likelihood of educational and training programmes leading to decent work. In such contexts, additional resources can be allocated to initiatives that redress discrimination, such as enhancing school budgets in areas where marginalized minorities are concentrated, or ensuring additional support for children with disabilities. Even where the overall economy is less buoyant, there is still scope for an analysis of spending patterns and their contribution to reducing discrimination.

Taking these findings into account, we now tease out some recommendations. These are primarily aimed at donors and governments, and are framed in broad terms as most of the issues raised are generic across different social groups and sectors.


## Recommendations:

**1. Promote the realization of rights and inclusive services for all (e.g. access to education, workers' rights) as a primary route to change.** Framing of this kind has the potential to be more inclusive and to avoid generating backlash, and is consistent with SDG commitments to 'leave no one behind'. This will require investment in universal access to services and action to eradicate discrimination, such as attitude change campaigns targeted at service providers, employers and the general public, making discrimination illegal and individuals accountable for discriminatory actions.

**2. For groups facing particularly severe discrimination, or who face cumulative poverty-related barriers to education or employment, targeted financial and practical support and reservations continue to be necessary.** Practical support may include initiatives such as catch-up educational or training courses, or specific measures to make environments more accessible to people with mobility difficulties. Targeting these measures explicitly at low-income marginalized group members who meet eligibility criteria, and more public education to build support for these measures may be necessary to help combat backlash.

**3. Strengthen the institutions responsible for combatting discrimination and providing redress against it.** For example, increase the accessibility of the justice system so that marginalized groups can use legal protections more effectively. Likewise ensure commitment to implementing anti-discrimination policies and accountability for doing so among public officials and front-line service staff (e.g. teachers, health workers) and those responsible in the private sector (such as employers, private school management and teachers).

**4. Anti-discrimination policies and programmes are most effective in supportive economic and political contexts**, with adequate resourcing and with simultaneous campaigns to change attitudes. Donor and government action to reduce discrimination should try to facilitate this supportive broader context.

**5. Increasing representation of marginalized groups in the short term is likely to require targeted reservations.** Over time, as greater numbers of these groups progress through education and have greater familiarity with representative institutions and greater self-confidence, they may be more likely to put themselves forward for public office. Where discrimination is entrenched (for example against women leaders or disabled representatives), continued reservations are likely to be necessary into the medium term. It is important to bear in mind that representatives of marginalised groups – whether elected through open competition or reservations – often owe greater loyalty to political parties and mentors than to their identity group(s) and/ or may come under considerable pressure from organized interests, and vote accordingly.

**6. Enact attitude and behaviour change campaigns alongside affirmative action measures.** Ongoing discriminatory attitudes and practices can undermine the effectiveness of measures such as legislation, reservations, and financial support. Such campaigns need to target both

the general public and people whose responsibility it is to implement anti-discrimination policies and programmes – for this group additional tailored training is likely to be necessary. This is vital for addressing embedded discrimination in public and private sector institutions. Examples include training for health workers to promote equal treatment of all groups and pre- and in-service training for teachers on practical ways to provide equal learning opportunities, such as gender-responsive teaching, bilingual education or supporting students with disabilities.

**7. Review impacts regularly**. Be aware that designating support for particular social groups can lead to unexpected negative impacts, such as perceived 'special treatment' causing resentment and sharpening discrimination. Regular review can ensure that timely steps are taken to minimise such resentment, to ensure that programmes are benefiting economically disadvantaged members of socially excluded groups, rather than being captured by elites. Regular review can also help identify where progress is sufficient that affirmative action measures are no longer necessary or need to be refined to focus on the most disadvantaged members of designated groups.

**8. Donors must be aware that they are intervening in a highly political arena** and must be careful to follow the leads of governments or civil society organisations committed to ending discrimination and advancing marginalized groups' rights. This may be a difficult path to tread as different groups have competing interests and given that the most marginalized groups are not always represented by civil society or by organized constituencies in government.

9. **The SDGs provide an opportunity for promoting more forceful and effective action on discrimination.** Given the strong emphasis in the SDGs on combating poverty and promoting equality, there is currently a window of opportunity to galvanise more widespread commitment to reducing discrimination, and in particular to ensure that any such measures reach the most marginalized.

## Key Evidence Gaps

Here we summarise some of the key evidence gaps that emerged from this review.

*Broad issues*

There is no clear analysis of the r**elative impacts and cost-effectiveness of, or the importance of synergies between different strategies** (eg legal reform, quotas, broad social investments, targeted investments, attitude change programmes). Nor is there much analysis of the importance of investments across sectors (eg in both education and labour markets simultaneously). A better understanding of these issues would underpin effective programme design.

The role of **civil society** in advocating for, and holding governments to account for the implementation of anti-discrimination policies is another clear evidence gap. This gives a rather one dimensional picture of policies and programmes emanating from central governments but the role of civil society in shaping these initiatives and their implementation is less well understood. Furthermore, greater understanding of the contributions and innovative nature of some civil society society anti-discrimination action and its potential for enhancing government action would underpin more effective policy design and implementation.

Further analysis of the **distributional impacts of affirmative action policies** – and in particular, their impacts on poor groups – is needed. This should be accompanied by creative thinking about how these policies could more effectively reach the poorest members of marginalised groups.

We found very little evidence concerning i**nitiatives to combat discrimination among front-line service providers,** sauch as health workers and to promote a culture of equal services for all. More evidence of effective practice is needed, if necessary drawing on small scale examples that can guide scaled-efforts. Lessons could be drawn from Sweden's experience in supporting training in anti-discriminatory practice.

## Specific social groups

There is a major evidence gap concerning impacts of anti-discrimination policies on disabled people.

There is surprisingly little analysis of the **impact of affirmative action measures in labour markets on women**: existing analysis concentrates on programmes such vocational training for young women, rather than examining the effects of laws outlawing discrimination or labour market quotas.

There is also a clear absence of any analysis of **initiatives to redress inequalities and discriminatory practices that affect boys or men,** such as stereotypes of young men as prone to violent criminality, which affects their job prospects and overall security in some contexts.

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# Annex 1: Further Details on Literature Found

## Annex 1: Methodology

This annex brings together the methodological information about the search conducted for this review – following a brief introduction. Section A2.1 give the keywords used, Section A2.2 the handsearch locations and Section A2.3 definitions used by the research team during the search.

Literature Search

The search phase of the review took place in August and September 2015, with a short additional gap-filling search held in October 2015. The search strategy used multiple techniques to locate the most relevant studies from across disciplines and research designs in both the grey and the academic literature, drawing on a range of types of research. These included case studies, large-scale experimental research, longitudinal panel studies, natural experiments, policy analysis, conceptual analysis and participatory research. Search keywords were developed through an extensive process of testing and experimentation in order to make it possible to return the most relevant search results.

During the first search stage, researchers flexibly applied the terms in these search grids to construct searches in Google and Google Scholar. As well locating literature for inclusion, this stage of the search was also used to identify key literature in each of the thematic areas, key organisations and key programmes and policies by country. Key word searches were also undertaken in academic databases.

Searches were then conducted on organisations' websites and for specific programmes and reports to relevant international treaty bodies. Finally, a process of forward and backward snowballing[40] was followed on the references and citations in the included literature. Overall, the researchers searched 100 organisations and for 245 specific programmes or pieces of legislation. The literature search combined searches in a range of locations and was designed so that key programmes and policies

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[40] Snowballing refers to the checking of references and citations of studies located during the initial stages of the search process for further relevant studies.

were picked up and recorded at all stages of the search and could be handsearched to look for any further available information about their impact.

Searches were conducted using

- Google

- Google Scholar

- Pub Med

- Econ Lit

- IBSS

- ERIC

- Sociological Abstracts

We conducted forward and backward snowballing on the documents found during the first stage of the search process, conducted handsearching (Section A2.2) and considered the relevant international human rights reports from selected countries. Recommendations for experts and programmes known by the research team were also added.

Studies were added to an EPPI Reviewer database based on the inclusion criteria in Table A1. Inclusion decisions were made by one researcher and papers were assessed during two levels of screening by the paper's authors. Uploaded studies were coding to capture basis information about the study and the type of research design used.

## Table A1: Inclusion criteria

| | | |
|---|---|---|
| **Language** | **Is the study in English, French or Spanish** | **If not exclude …** |
| **Publication type** | Is the paper a Masters thesis? | If yes exclude (for PhD thesis code as such and search for shorter research articles from it later) |
| **Location** | Does the study take place in a LMIC | If not exclude |
| **Time** | Was the study published after 2000 | If not exclude |
| **Focus** | Does the study discuss an anti-discrimination policy or intervention in health, education, social protection, labour markets or political participation? Does it discuss a large-scale policy or programme or a pilot study | If not exclude |
| **Design** | Is the paper a research study, evaluation or analysis paper? | If unsure, include |
| **Outcomes** | Does the study look at impact on an excluded group? Does the study assess changes among excluded groups in any of income/consumption poverty multidimensional deprivation social inclusion access to services or information experience of work representation empowerment subjective well-being or feelings of inclusion/exclusion | If not exclude |

## A.2.1 Search keyword grids

**Broad search**

| Education | Child* | | Poor* | Exclude US, Europe, America if needed |
|---|---|---|---|---|
| **Health** | Youth | "Anti-discrimination" | | Try regional terms if locating evidence is difficult |
| **Labour Markets** | Girl OR boy | "Social discrimination" | | Africa, Asia, Latin, Caribbean, Pacific |
| **Social Protection** | Disability "disability AND (mental OR physical OR intellectual)" | "Affirmative action" | | |
| | "Mental Disorder" | | | |
| | "Mental Health" | | | |
| | Ethnic | | | |
| | "(Caste or Tribe)" | | | |
| | Religio* | | | |
| | Marginalised | | | |
| | Displaced | | | |
| | Migrant | | | |
| | Refugee | | | |
| | "(Isolate* OR Rural)" | | | |

| | | | |
|---|---|---|---|
| | Women | | | |
| | LGBT | | | |
| | "men who have sex with men" | | | |
| | (Health OR illness OR health disorder (Health AND Stigma) | | | |
| | Old/elder/age/age* | | | |

## Thematic search grids

| Programme type | | Target group/or group experiencing change | Type of study/evidence words | Outcome areas | Focus on LMICs |
|---|---|---|---|---|---|
| Education | Scholarship | Child* | Experiment | Access | Exclude US, Europe, America if needed |
| | Cash transfer | Youth | Evaluat* | Income | Try regional terms if locating evidence is difficult |
| | Feed/food | Girl/boy | Outcome | Consumption | Africa, Asia, Latin, Caribbean, Pacific |
| | "Catch up" | Disability "disability AND (mental OR physical OR intellectual)" | Impact | Expenditure | |
| | "Non-formal" | "Mental Disorder" | Pilot | Poverty | |
| | Skills | "Mental Health" | Trial | Assets | |
| | "fee waiver" | Ethnic | Participatory | Work | |
| | "fee exemption" | "(Caste or Tribe)" | Cohort/Panel/Case | Wage* | |
| | Legislation | Religio* | Analysis | Empowerment | |
| | Teacher training | Marginalised | | Exclusion | |
| | Community | Displaced | | Discrimination | |

| | Curricul* (looking for more sensitive curriculum development or other changes in the curriculum) | Migrant | | School completion | |
|---|---|---|---|---|---|
| | Language | Refugee | | Attendance | |
| | Budget | "(Isolate* OR Rural)" | | Enrolment | |
| | Planning | Women | | "Years of schooling" | |
| | Policy | LGBT | | "Perception (discrimination OR exclusion OR inclusion)" | |
| | | "men who have sex with men" | | Stigma | |
| | | (Health OR illness OR health disorder (Health AND Stigma) | | Well-being | |
| | | Old/elder/age/ age* | | | |
| | | Indigenous | | | |

**More specific searches**

| Programme type | | Target group/or group experiencing change | Type of study/evidence words | Outcome areas | Focus on LMICs |
|---|---|---|---|---|---|
| "Health" | Legislation/Law | Child* | Experiment | Income | Exclude US, Europe, America if needed |
| Physical Health | Planning | Youth | Evaluat* | Consumption | Try regional terms if locating evidence is difficult |
| Mental Health | Campaign | Girl OR boy | Outcome | Poverty | Africa, Asia, Latin, Caribbean, Pacific |
| | Insurance | Disability "disability AND (mental OR physical OR intellectual)" | Impact | Assets | |
| | Universal | "Mental Disorder" | Pilot | Expenditure | |
| | Voucher | "Mental Health" | Trial | Access | |
| | Services | Ethnic | Participatory | Service quality/experience of care | |
| | Health Check | "(Caste or Tribe)" | Cohort/Panel/Case | Infant mortality | |
| | Vaccination | Religio* | Analysis | Child mortality | |
| | Education/ training | Marginalised | Experiment | Nutrition | |
| | Systems | Displaced | | Immunisation | |
| | Funding | Migrant | | Knowledge | |

| | Awareness | Refugee | | Empowerment | |
|---|---|---|---|---|---|
| | Training | "(Isolate* OR Rural)" | | Exclusion | |
| | | Women | | Discrimination | |
| | | LGBT | | Stigma | |
| | | "men who have sex with men" | | "Perception (discrimination OR exclusion OR inclusion)" | |
| | | (Health OR illness OR health disorder<br>(Health AND Stigma) | | Well-being | |
| | | Old/elder/age/age* | | | |
| | | Indigenous | | | |

| Programme type | | Target group/or group experiencing change | Type of study/evidence words | Outcome areas | Focus on LMICs |
|---|---|---|---|---|---|
| "Labour market" | Skill* train* (1) | Child* | Experiment | Income | Exclude US, Europe, America if needed |
| | "Job training" (1) | Youth | Evaluat* | Consumption | Try regional terms if locating evidence is difficult |
| | "Small business promotion" (2) | Girl OR boy | Outcome | Poverty | Africa, Asia, Latin, Caribbean, Pacific |
| | "Enterprise promotion" (2) | Disability "disability AND (mental OR physical OR intellectual)" | Impact | Assets | |
| | Job search/job centres/access (3) (dropped 17/09/15) | "Mental Disorder" | Pilot | Expenditure | |
| | Labour rights/(4) | "Mental Health" | Trial | Work | |
| | Maternity (5) (dropped 17/09/15) | Ethnic | Participatory | Wage* | |
| | Legislation (5) | "(Caste or Tribe)" | Cohort/Panel/Case | Empowerment | |
| | Workplace benefits (4) | Religio* | Analysis | Exclusion | |
| | Union/organised labour (6) (dropped 17/09/15) | Marginalised | Intervention | Discrimination | |

| | Distortion (5) | Displaced * | Pilot | Working hours | |
|---|---|---|---|---|---|
| | "labour market reform" (5) | Migrant | | Knowledge | |
| | Labour standards (4) | Refugee | | Employment | |
| | | "(Isolate* OR Rural)" | | "Labour force participation" | |
| | | Women | | Formal work | |
| | | LGBT | | Casual work/ Informal work | |
| | | "men who have sex with men" | | "working conditions" | |
| | | (Health OR illness OR health disorder (dropped 17/09/2015)<br>(Health AND Stigma) | | Environments/ labour standards/ access/inclusion | |
| | | Old/elder/age/ age* | | "Perception (discrimination OR exclusion OR inclusion)" | |
| | | Indigenous | | Stigma | |
| | | Sexism | | Decent work | |
| | | | | Access | |

| Programme type | | Target group/or group experiencing change | Type of study/evidence words | Outcome areas | Focus on LMICs |
|---|---|---|---|---|---|
| "Social Protection" | Pension/social pensions/ contributory pensions | Child* | Experiment | Access | Exclude US Europe, America if needed |
| | Cash transfer/Conditional cash transfer | Youth | Evaluat* | Income | Try regional terms if locating evidence is difficult |
| | Social Insurance | Girl/boy | Outcome | Consumption | Africa, Asia, Latin, Caribbean, Pacific |
| | "health insurance" | Disability "disability AND (mental OR physical OR intellectual)" | Impact | Poverty | |
| | "social assistance" | "Mental Disorder" | Pilot | Expenditure | |
| | In kind transfers | "Mental Health" | Trial | Assets | |
| | Public works programme | Ethnic | Participatory | Work | |
| | Public employment programme | "(Caste or Tribe)" | Cohort/Panel/Case | Wage* | |
| | Universal benefit | Religio* | Analysis | Empowerment | |
| | Unemployment insurance | Marginalised | Experiment | Exclusion | |
| | Disaster insurance | Displaced | | Discrimination | |
| | Funeral assistance/insurance | Migrant | | "Perception (discrimination OR exclusion OR inclusion)" | |

| | Asset transfer | Refugee | | Stigma | |
|---|---|---|---|---|---|
| | Subsid* | "(Isolate* OR Rural)" | | Well-being | |
| | | Women | | | |
| | | LGBT | | | |
| | | "men who have sex with men" | | | |
| | | (Health OR illness OR health disorder<br>(Health AND Stigma) | | | |
| | | Old/elder/age/ age* | | | |
| | | Indigenous | | | |
| | | Sexism | | | |
| | | Xenophobia | | | |
| | | "Tribal Group" | | | |

## A.2.2 Handsearch locations

**Organisations**

| | |
|---|---|
| Africa Platform for Social Protection http://africapsp.org/ | JPAL evaluation database |
| Asian Development Bank – work in exclusion | Lancet series on global mental health – |
| Better evaluation network | Latin American Network of Non-Governmental Organizations of Persons with Disabilities and their Families http://www.riadis.org/en |
| Bolivian Union of Child and Adolescent Workers | |
| Bridge social movements guide | |
| BTI index | |
| CARISMA and PANCAP – Caribbean work on attitudes towards PLWHIV | Latin American Studies Association |
| Centre for Social Protection | Leonard Cheshire international work |
| CESCR | |
| Commonwealth Plan of Action for Youth Empowerment | Migrants Rights Network |
| Commonwealth Youth Development Index | Migration Policy Group, |

| | |
|---|---|
| Commonwealth Youth Programme | Brussels, Belgium |
| CRC | Migration Policy Institute, US |
| Economic Commission for Latin America and the Caribbean | Minority Rights Group International |
| Effective States and Inclusive Development Research Centre | National Network for the Rights of Persons with Disabilities http://www.redi.org.ar/ |
| European Centre for Minority Issues | |
| European Council on Refugees and Exiles | |
| From Protection to Production | New Tactics in Human Rights programme |
| Geneva-based employment research centre?? Find out | NOW 7 Research projects on social protection interventions in Sub-Saharan Africa |
| GESS – Social Security in Africa – Overview | |
| GESS – STEP Portugal Programme | |
| Global Applied Disability Research and Information Network on Employment and Training http://www.gladnet.org/mail.cfm?pageID=7 | Organisation of American States |
| Global union federation Public Services International | Organisations and Programmes |
| http://mobile.opendocs.ids.ac.uk/opendocs/handle/123456789/7062#.VgEOI32Uqlp | Oxford Policy Management |
| http://pdba.georgetown.edu/IndigenousPeoples/ngos.html#int | |

| | |
|---|---|
| http://socialprotection-humanrights.org/key-issues/social-protection-systems/family-and-child-benefits/ | Pacific islands forum secretariat |
| http://www.ascleiden.nl/content/webdossiers/social-protection-africa | Poverty Action Impact evaluation database |
| http://www.mdgfund.org | Quota Project |
| http://www.youth-employment-inventory.org/inventory/view/663/ | Raising Her Voice |
| Human Rights Watch | Refugee Net |
| IDEA | Refugees International, USA |
| IDEA | Representative of the United Nations Secretary-General on the Human Rights of Internally Displaced Persons |
| IDS Sexuality, poverty and law centre | |
| ILO – also search the global social protection floor initiative | |
| ILO Global Business and Disability Network http://www.businessanddisability.org/ | Right to Education Project |
| Incheon Strategy in Asia and the Pacific | Rights Watch |
| Indian Institute of Dalit Studies | Self Employed Women's Association – India |
| Inter American Development Bank – work on minorities | |
| Inter Parliamentary Union | Sex Work Law Map |

| | |
|---|---|
| Inter-Parliamentary Union | Social Assistance in Developing Countries Database Version 5.0 (2010) |
| Inter-Regional Inequality Facility | |
| Inter-Regional Inequality Facility | Social Protection in Africa |
| INTERIGHTS Commonwealth and International Case-law Database | Social security country profiles |
| International Centre for Migration and Health | Social Security Programs Throughout the World: Africa 2011 |
| International Food Policy research institute | |
| International Network on Displacement and Resettlement | Southern African Migration Project |
| International Online Resource Centre on Disability and Inclusion | The Refugee Council, UK |
| International Policy Centre for Inclusive Growth | UN OHCHR |
| International Trade Union Congress | UN permanent forum on indigenous issues |
| International work group on indigenous affairs | UN Special Rapporteur on the Right to Education |
| | UN Women evaluation |

| | database |
|---|---|
| | UNDP |
| | UNESCO evaluation database and right to education database |
| | UNGEI |
| | UNICEF (Regional Office) Eastern and Southern Africa Social Policy |
| | UNICEF evaluation database |
| | United Nations Declaration on the Rights of Indigenous Peoples |
| | UNSRID |
| | US Committee for Refugees |
| | WHO disability resources |
| | World Bank – open knowledge repository and evaluation |

| | repository |
| --- | --- |
| | World Health Organisation |
| | [www.idea.int](www.idea.int) |
| | Young Lives |
| | Youth Employment Inventory |

**National and regional legislation and policy**

| Afghanistan | Let us Learn initiative in Afghanistan, Bangladesh and Nepal | Jamaica | National Youth Strategy |
|---|---|---|---|
| Argentina | Programa Familias | Jamaica | Path (conditional cash transfer) |
| Argentina | Universal child allowance | Jordan | 10% quota for women in decentralisation |
| Argentina | Programa Familias | Kenya | Persons with Disabilities Act |
| Argentina | Universal child allowance | Kenya | National Cohesion and Integration Act |
| Bangladesh | Female Secondary Stipend Programme | Kenya | Employment Act, Children Act, Universities Act all have provisions to reduce discrimination (ERT, 2012) |
| Bangladesh | Basic Education for Hard-to-Reach Urban Working Children | Kenya | Policy of promoting inclusion of disabled children in schools, Persons with Disabilities Act |
| Bangladesh | Maternal Voucher | Kenya | HSNO |
| Bangladesh | Female Secondary School Assistance Project | Kenya | Affirmative action for women at university level |
| Bangladesh | Domestic Violence Act 2010 | Kenya | Allowing oral evidence in land tribunals (move towards substantive equality for marginalised group) |
| Bangladesh | Prevention of Cruelty to Women and Children Act | Kenya | HSNO |
| Bangladesh | Acid Crime Control Act | Kenya | Affirmative action for women at university level |
| Bangladesh | Child Marriage Restraint Act | Kenya | Allowing oral evidence in land tribunals (move towards substantive |

| | | | |
|---|---|---|---|
| | | | equality for marginalised group) |
| **Bangladesh** | Dowry Prohibition Act | **Kenyan** | Persons with Disabilities Act 2003 |
| **Belize** | Boost (conditional cash transfer) | **Korea** | Mother's School |
| **Bolivia** | Bolivia quotas act of 1997 – then in 2004 | **Lesotho** | Food & Cash Transfer |
| **Bolivia** | Beca Futuro | **Lesotho** | Food & Cash Transfer |
| **Bolivia** | Law 045 Against Racism and All Forms of Discrimination, | **Liberia** | Economic Empowerment for Adolescent Girls |
| **Bolivia** | 1994 Bolivian National Education Reform (mandates bilingual teaching) | **Liberia** | Economic Empowerment for Adolescent Girls |
| **Bolivia** | Bilingual Literacy and Reproductive Health | **Malawi** | National employment and labour policy |
| **Bolivia** | Beca Futuro | **Malawi** | FACT (Concern); Mchinji (UNICEF) |
| **Bolivia** | Law 045 Against Racism and All Forms of Discrimination | **Malawi** | Dowa Emergency Cash Transfers |
| **Bolivia** | 1994 Bolivian National Education Reform (mandates bilingual teaching) | **Malawi** | FACT (Concern); Mchinji (UNICEF) |
| **Bolivia** | Bilingual Literacy and Reproductive Health | **Malawi** | Dowa Emergency Cash Transfers (cash transfer) |
| **Bosnia-Herzegovina** | USAID Political Processes Support – programme increases women's political participation at the local and national level to develop a cadre of women leaders in the community by providing training on how to run for office and engage in politics. This project helped establish the first-ever Women's Caucus in the Federation of BiH Parliament in 2014. | **Malaysia** | New Economic Policy |
| **Bosnia-Herzegovina** | PRO-Future project helps women victims of war and other trauma to heal, raise self-esteem and become leaders in reconciliation | **Mexico** | Progresa, Oportunidades |

| | | | |
|---|---|---|---|
| | processes in their communities. The project provides training – on social justice, peace building, advocacy, etc. – for women through Associations of Parent–Student Councils. The new knowledge empowers these women to organize, initiate and engage in dialogue and advocacy campaigns to promote reconciliation in the community. | | |
| **Brazil** | Law 11340 (The Maria da Penha Law) | **Mexico** | Bilingual Literacy for Life |
| **Brazil** | Bolsa Familia, | **Mongolia** | Child Money Programme |
| **Brazil** | Bolsa Escola | **Morocco** | Means of Socio-economic Empowerment and Integration for Women |
| **Brazil** | Brazil, Gender and Race – United for Equal Opportunities | **Morocco** | Means of Socioeconomic Empowerment and Integration for Women |
| **Brazil** | National Documentation Programme for Rural Women Worker | **Mozambique** | GAPVU/PSA (government |
| **Brazil** | National Affirmative Action Programme (2002) | **Mozambique** | Food Subsidy Programme; Promoting Women's Literacy in Angola and Mozambique |
| **Brazil** | National Human Rights Programme (2002) | **Mozambique** | GAPVU/PSA (government |
| **Brazil** | In August 2012, Brazil passed the most extensive affirmative action law in the Americas, and possibly the world, requiring that 50% of public university seats be allocated to low-income and Afro-Brazilian students (Walsh, 2014) | **Mozambique** | Food Subsidy Programme (cash transfer); Promoting Women's Literacy in Angola and Mozambique |

| Brazil | National Plan for Women's Policies | Namibia | Affirmative action act, BEE, Transformational Economic and Social Empowerment Framework |
|---|---|---|---|
| Brazil | Bolsa Familia, | Namibia | Affirmative action act, Black economic empowerment, Transformational Economic and Social Empowerment Framework |
| Brazil | Bolsa Escola | Nepal | Provisions for quotas for women in public service |
| Brazil | Brazil, Gender and Race – United for Equal Opportunities | Nepal | Domestic Violence (Crime and Punishment) Act 2009 |
| Brazil | National Documentation Programme for Rural Women Worker | Nicaragua | Red de Protección Social |
| Brazil | National Affirmative Action Programme (2002) | Nigeria | Vision HIV awareness |
| Brazil | National Human Rights Program (2002) | Nigeria | Mother and Child Education Programme |
| Brazil | 2012 affirmative action law | Nigeria | Vision HIV awareness |
| Brazil | National Plan for Women's Policies | Nigeria | Mother and Child Education Programme |
| Cambodia | Community Self-prevention Against Trafficking of Women and Children | Pakistan | Adult Female Functional Literacy Programme |
| Cambodia | Cambodia Education Sector Support Project | Pakistan | Mobile-Based Post Literacy Programme |
| Chile | AUGE programme. Example of 'social guarantee' programme – guarantee of access to basic services for all | Palestine | Early Childhood, Family and Community Education Programme |
| Chile | Chile Solidario | Panama | Red de Oportunidades |

| Chile | Universal voucher system—education | Peru | Casa Maternal |
|---|---|---|---|
| Chile | Bono Trabajador Activo- | Peru | Formación Empresarial de la Juventud, Calificación de Jóvenes Creadores de Microempresas |
| Chile | Chile Solidario | Philippines | Anti-Violence against Women and their Children Act 2004 |
| Chile | Universal voucher system – education | Philippines | Rape Victims Assistance Act 1998 |
| Chile | Bono Trabajador Activo- | Philippines | Anti-Rape Law 1997 |
| China | Compulsory Education Law (2006) | Philippines | Anti-Sexual Harassment Act of 1995 |
| Colombia | Familias en Acción Program | Philippines | Supporting Maternal and Child Health Improvement and Building Literate Environment Mindanao Project |
| Colombia | Programa Avancemos | Regional | Latin America: Labour Market Information System |
| Colombia | Jóvenes en Acción | Regional | Africa: Regional Programme for Youth Employment and Social Cohesion |
| Colombia | 1991 Constitution – the first in South America to obligate | Regional | Global Jobs Pact |
| Colombia | Law of Equal Opportunities proposed in 2012 (was without decision in 2014 at time of writing). | Romania | Guaranteed seat in parliament for all minorities |
| Colombia | Hogares Communitarios de Bienestar | Rwanda | Mutuelles de Santé |
| Ecuador | Bono de Desarrollo Humano | Rwanda | Mutuelles de Santé |
| Ecuador | Affirmative action is a provision of the 2009 Constitution | Senegal | Agence d'Exécution des Travaux d'Intérêt Public contre le Sous-emploi (public works) |

| Ecuador | Bono Solidario – name changed in 2003 to Bono de Desarrollo Humano (BDH) | Senegal | Agence d'Exécution des Travaux d'Intérêt Public contre le Sous-emploi (public works) |
|---|---|---|---|
| El Salvador | Red Solidaria | Serbia | Strategy for Prevention and Protection against discrimination – adopted 2013 with an action plan 2013–2018 |
| Ethiopia | PSNP (government + donors | Serbia | National Minorities Council |
| Ethiopia | Alternative Basic Education Centres provide mobile schooling and libraries for pastoralist children | Serbia | Council for the Improvement of the Status of Roma and the Implementation of the Decade of Roma Inclusion |
| Ethiopia | Integrated Women's Empowerment Programme | Serbia | Decade of Roma Inclusion |
| Ethiopia | PSNP (government + donors | South Africa | Employment Equality Act |
| Ethiopia | Alternative Basic Education Centres provide mobile schooling and libraries for pastoralist children | South Africa | Child Support Grant (government) |
| Ethiopia | Integrated Women's Empowerment Programme | South Africa | Employment Incentive Tax Bill |
| Ghana | LEAP Ghana | South Africa | One Love Campaign |
| Ghana | Social pension, destitute allowance (government) | South Africa | HIV Counselling and Testing Campaign |
| Ghana | National Health Insurance Scheme | South Africa | National Disability Strategy |
| Ghana | Essential Health Intervention Project (GEHIP) | South Africa | South African Transformation Agenda |
| Ghana | LEAP Ghana | South Africa | Employment Equity Act 1998 |
| Ghana | Social pension, destitute allowance (government) | South Africa | Curriculum 2005 |
| Ghana | National Health Insurance Scheme | South Africa | Child Support Grant (government) |
| Ghana | Essential Health Intervention | South Africa | Employment |

|  | Project (GEHIP) |  | Incentive Tax Bill |
|---|---|---|---|
| **Guatemala** | Bilingual education | **South Africa** | One Love Campaign |
| **Honduras** | Programa de Asignación Familiar | **South Africa** | HIV Counselling and Testing Campaign |
| **India** | Andhra Pradesh Indira Kranthi Pathakam | **South Africa** | National Disability Strategy |
| **India** | Anti-stigma project in India targeting hospital managers, who use checklist of indicators to determine how well their hospital serves people living with HIV and identify ways to improve | **South Africa** | South African Transformation Agenda |
| **India** | Child Labour Prevention and Regulation Act | **South Africa** | Employment Equity Act 1998 |
| **India** | India: Saakshar Bharat Mission | **South Africa** | Curriculum 2005 |
| **India** | Integrated Child Development Services | **Sri Lanka** | Affirmative Action |
| **India** | Kerala People's Campaign for the Ninth Plan | **Swaziland** | Cash & Food Transfers (Save the Children) |
| **India** | Khabar Lahariya (News Waves) | **Swaziland** | Cash & Food Transfers (Save the Children) |
| **India** | Mahatma Gandhi National Rural Employment Guarantee Act | **Taiwan** | Gender Equity in Education Law 2004 |
| **India** | Mahila Samakhya women's empowerment programme | **Tanzania** | Green Start family planning programme |
| **India** | National Health Mission (2005) and National Urban Health Mission (2013) | **Tanzania** | Affirmative action for women at university level |
| **India** | Rashtriya Madhyamik Shiksha Abhiyan | **Tanzania** | Green Start family planning programme |
| **India** | Rashtriya Swathya Bima Yojana | **Tanzania** | Affirmative action for women at university level |
| **India** | Reservation of posts in government jobs and higher education for SCs, STs and OBCs | **Thailand** | Universal Health Insurance Programme |
| **India** | Reservations for women at village council level | **Timor-Leste** | Regulation No. 2002/5 on the |

| | | | establishment of a Labour Code for East Timor |
|---|---|---|---|
| **India** | Right to Education Quota | **Turkey** | Family Literacy Programmes |
| **India** | Saakshar Bharat Mission | **Turkey** | Functional Adult Literacy and Women's Support Programme |
| **India** | Sahajani Shiksha Kendra: Literacy and Education for Women's Empowerment | **Uganda** | Since 1996 places are reserved for disabled people and women at all tiers of government (village and local government through to parliament). |
| **India** | Swarna Jayanti Shahari Rojgar Yojana | **Uganda** | Small-scale mobile education for Karimajong pastoralist children |
| **India** | Swarnajayanti Gram Swarojgar Yojana | **Uganda** | Youth Opportunities Programme of 2006–2010 |
| **India** | Tamil Nadu Vazhndhu Kaattuvom Society | **Uganda** | Affirmative action for women at university level |
| **Indonesia** | Socio-Economic Development | **Uganda** | Constitution allows for preferential policies for excluded groups to redress historical imbalances but which groups and what policies are not specified. |
| **Indonesia** | Programme for Ethnic and Mountainous Areas | **Uganda** | Youth Opportunities Programme of 2006–2010 |
| **Indonesia** | Or Programme 135 Phase II (P135II) | **Uganda** | Affirmative action for women at university level |
| **Indonesia** | Gender Justice Education for Marginalised Women | **Uganda** | Constitution allows for preferential policies for excluded groups to redress |

|  |  |  | historical imbalances but which groups and what policies are not specified |
|---|---|---|---|
| **Yemen** | Literacy Through Poetry | **Uruguay** | 2013 Affirmative Action Bill |
| **Zambia** | Anti-Gender-Based Violence Act 2011 | **Yemen** | Literacy Through Poetry |

## Reports to international bodies

| | | | |
|---|---|---|---|
| **Bolivia** | UPR 2014<br>CESCR 2008<br>UNCRC 2009<br>ICCPR 2011/13 | **Malaysia** | UPR 2013<br>UNCRC 2006 |
| **Brazil** | UPR 2012<br>ICCPR 2005<br>CESCR 2009<br>UNCRC 2014<br>CRPD 2014 | **Namibia** | UPR 2010<br>UNCRC 2011<br>CESCR2015<br>ICCPR 2014 |
| **China** | UPR 2013<br>CRPD 2011<br>UNCRC 2012<br>CESCR 2014 | **Nepal** | CESCR 2014<br>UNCRC 2005<br>CRPD 2014<br>ICCPR 2012 |
| **Colombia** | CESCR 2009<br>UNCRC 2013<br>UPR2013<br>ICCPR 2010 | **South Africa** | UPR 2012<br>CRPD 2013<br>ICCPR 2015 |
| **Ecuador** | UPR 2012<br>CESCR 2011/2012<br>UNCRC 2008/09<br>CRPD 2014<br>ICCPR 2009 | **Sri Lanka** | UPR 2012<br>UNCRC 2010<br>ICCPR 2014 |
| **Ethiopia** | UPR 2014<br>CESCR 2011<br>UNCRC 2013<br>CRPD 2012<br>ICCPR 2011 | **Tanzania** | UNCRC 2012<br>ICCPR 2007 |
| **India** | CESCR 2008<br>UNCRC 2014<br>UPR 2012 | **Uganda** | ICCPR 2003<br>UNCRC 2005<br>UPR 2011<br>CRPD 2015 |
| **Kenya** | UPR 2015<br>UNCRC 2015<br>CESCR 2008<br>CRPD 2014<br>ICCPR 2012 | **Uruguay** | UPR 2013<br>UNCRC 2015<br>ICCPR 2013 |

## A.2.3 Definitions

**Thematic terms**

| | |
|---|---|
| **Anti-discrimination policies and programmes** | Anti-discrimination measures are defined as laws specifying non-discrimination or positive discrimination, including international conventions and their translation into national law; programmes or policies that translate such laws into activities intended to reduce discrimination or to strengthen capacity among commonly discriminated groups (affirmative action); and public information, education or campaigns that seek to change negative perceptions of, or stigma against, specific social groups. |
| **Extreme poverty** | $1.25 per person per day (or below national poverty lines in some cases). This basic statistical measure is based on consumption or expenditure as recorded by household surveys (Shepherd et al., 2014). |
| **Severe poverty** | $0.70 per person per day, based on average consumption by the poor in Sub-Saharan Africa (or in some cases consumption below national food or severe poverty lines) (Shepherd et al., 2014).). |
| **Chronic poverty** | Extreme poverty that persists over years or a lifetime, and that is often transmitted inter-generationally (Shepherd et al., 2014).). |
| **Poorest groups** | For this review, the poorest groups are defined as people who are chronically poor, severely poor or intensely multi-dimensionally deprived. |
| **Multidimensional deprivation/poverty** | Multidimensional indicators recognise that poor people's experience of deprivation is generally broader than low income or consumption and often includes experiences such as poor health, lack of education, disempowerment, poor working conditions and the threat of violence. There are several indices or measures of multidimensional poverty. For example, OPHI's Multidimensional Poverty Index defines people as multi-dimensionally deprived if they are poor in at least three out of 10 dimensions and severely multi-dimensionally deprived if they are poor in five out of 10 dimensions.[41] |
| **Stigma** | Shared negative beliefs about a group of people or a practice. |
| **Social inclusion** | The process of improving the ability, opportunity and dignity of people, disadvantaged on the basis of their identity, to take part in society (World Bank, 2013c. |

[41] www.ophi.org.uk/multidimensional-poverty-index/

| Child | Persons under 18 as per UNCRC definition. |
|---|---|
| Adolescent | Individuals aged 10–19. Can be defined in three stages, early (10–13 years of age), middle (14–16), late (17–19) adolescents |
| Young people | Those aged 15–24. |
| Disability | There is no standard definition of disability. Persons with disabilities include those who have long-term physical, mental, intellectual or sensory impairments that in interaction with various barriers may hinder their full and effective participation in society on an equal basis with others.<br><br>One framework for disability is:<br>Impairment: A loss or abnormality in body structure or of a physiological or psychological function.<br>Activity: The nature and extent of functioning at the level of the person. Activities may be limited in nature, duration and quality.<br>Participation: The nature and extent of a person's involvement in life situations in relationship to impairments, activities, health conditions and contextual factors. Participation may be restricted in nature, duration and quality. Participation is considered within seven broad domains: personal maintenance; mobility; exchange of information; social relationships; education, work, leisure and spirituality; economic life; and civic and community life. |

## Methodological terms

| | |
|---|---|
| **RCT** | 'A study in which a number of similar people are randomly assigned to two (or more) groups to test a specific drug or treatment. One group (the experimental group) receives the treatment being tested, the other (the comparison or *control group*) receives an alternative treatment, a dummy treatment (*placebo*) or no treatment at all. The groups are followed up to see how effective the *experimental treatment* was. *Outcomes* are measured at specific times and any difference in response between the groups is assessed statistically. This method is also used to reduce *bias*' http://www.nice.org.uk/website/glossary/glossary.jsp?alpha=R |
| **Randomisation** | Assigning participants in a research study to different groups without taking any similarities or differences between them into account. For example, it could involve using a random numbers table or a computer-generated random sequence. It means that each individual (or each group in the case of *cluster randomisation*) has the same chance of receiving each *intervention* http://www.nice.org.uk/website/glossary/glossary.jsp?alpha=R |
| **Experimental design** | Include the randomisation of participants in intervention and control groups where the independent variables (the drug, the cash transfer, the training of teachers) is controlled by the researchers. |
| **Quasi-experimental design** | Can either be where control and comparison groups are not randomly assigned by the research team or where the researchers are not able to manipulate the independent variable (e.g. where it would have been unethical to deliberately manipulate school scholarships). The research uses statistical techniques to control for the differences between subjects in the study – regression discontinuity is an example of this. |
| **Non-experimental or observational** | No control group and no manipulation of the independent variable by the researchers and there are no control and comparison groups. Observational study designs include cohort and longitudinal studies, cross-section designs. These studies often rely more on qualitative methods to collect data and can create powerful comparative research. |

**Analysis terms**

| | |
|---|---|
| **Realist synthesis** | This approach to the synthesis of evidence focuses on an understanding of the mechanisms by which an intervention works (or not) and under what conditions. |
| **Narrative synthesis** | A textual approach to evidence synthesis that relies on text to summarise and explain the findings of multiple studies. This method allows researchers to look beyond evidence of effectiveness in order to 'tell a story' and answer a range of questions about the evidence. http://www.lancaster.ac.uk/shm/research/nssr/research/dissemination/publications/NS_Synthesis_Guidance_v1.pdf |

## Quality Assessment

Assessment of quality in a review process aims to eliminate low-quality unreliable evidence. The study team initially aimed to assess the literature located during the search using an adapted version of the UK Department for International Development (DFID principles of high-quality evidence, which include criteria around conceptual framing, transparency, validity and reliability (DFID, 2014). However, as the search process unfolded, it was clear that, for the kind of literature available, this assessment method would have been inappropriate and would have meant the exclusion of policy analysis and more descriptive literature – vital to build a picture of the working of the policies and programmes. Where possible, the researchers applied a slightly adapted version of the criteria developed in Miske (2013) (see Box 4), in order to assess the quality of research designs and write-up.

**Box 4: Assessment Criteria**

- The research methods are appropriate to answer the research questions at the level of precision implied in the questions.

- The research design, methods and analytical tools are clearly described.

- The selection criteria are explained and justified.

- The context (i.e. the setting, the time, the events and the social forces that affect, or even constitute, a given body of data) is adequately addressed.

- Alternative explanations and negative cases are considered.

Source: Adapted from Miske (2013).

Few studies were excluded on the basis of these criteria; instead, sources were excluded primarily because of a lack of methodology. The researchers also excluded papers on the grounds of relevance throughout the analysis process.

## A.1.2 Analysis

In keeping with the type of evidence we located during our search and the nature of large-scale programming, policies and legislation, our analysis combined a narrative synthesis approach (Snilstveit et al., 2012) with a realist approach (Pawson, 2005), which aimed to look at context and the mechanisms through which the programmes and policies examined function. Where the literature allowed, we drew on political economy analysis which helped explain the effectiveness or non-effectiveness of particular policies. The analysis does not reflect all the 470 included studies: we drew on the most relevant and, where studies covered similar material or data, we included the most applicable.[42]
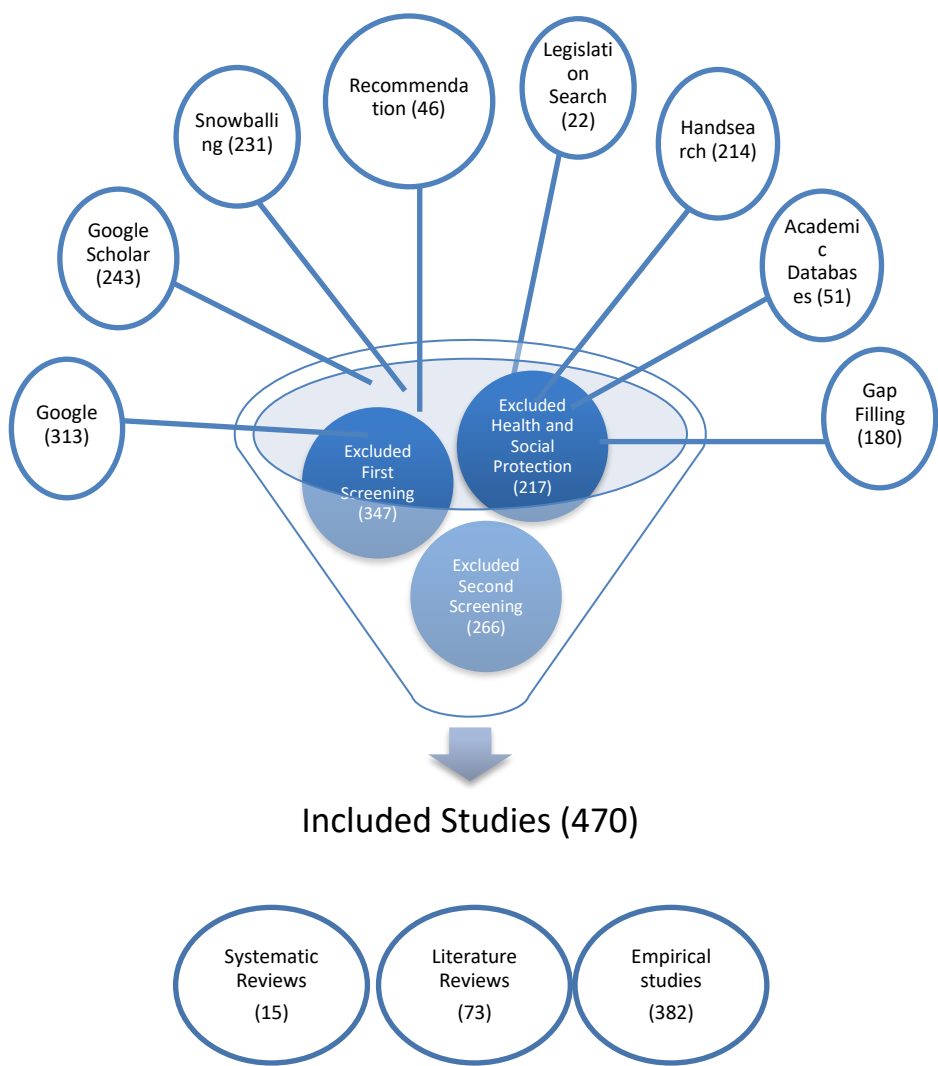
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[42] A full reference list is available; however, we include the studies we used in the analysis in the review bibliography.

# Annex 2: Further Detail on Studies Used

Figure 7 shows the different sources of papers used and reasons for exclusion at differnet stages of the process.

**Figure 7: Flowchart of the review process**



Included Studies (470)

Note: Empirical studies are those based on the analysis of primary or secondary data; reviews that are not explicitly systematic reviews are classed as literature reviews.

## Methodological distribution

Figure 8 shows the main methodological approaches  Secondary analysis of datasets was the most common methodological approach, reflecting the high number of papers that analysed national statistical data.

For the empirical studies included in the review, we recorded methodological data as appropriate.

### Figure 8: Distribution of Main Data Types  (Empirical studies)
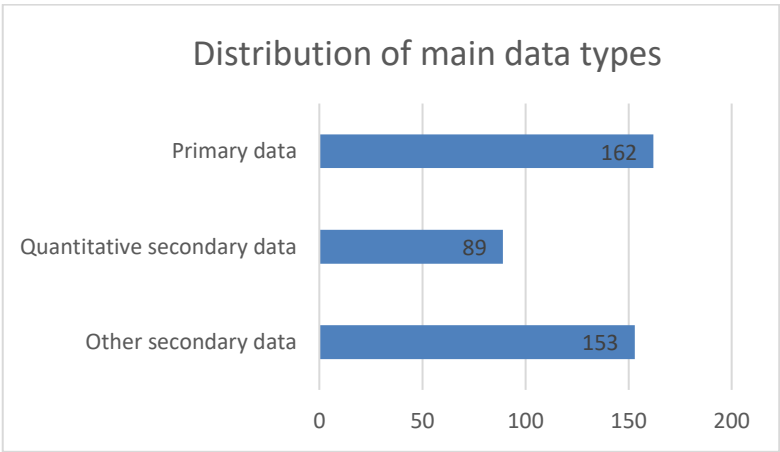


Note: Some studies  made use of more than one kind of data; hence numbers add up to more than 382.

Among the papers that collected primary data, we found a fairly even split between qualitative and quantitative data, with many fewer studies using mixed methods (Figure 9).

**Figure 9: Distribution of main types of data (primary studies)**



Data Types in Primary Studies

| Data Type | Value |
|-----------|-------|
| Mixed Methods | 23 |
| Quantitative | 74 |
| Qualitative | 65 |
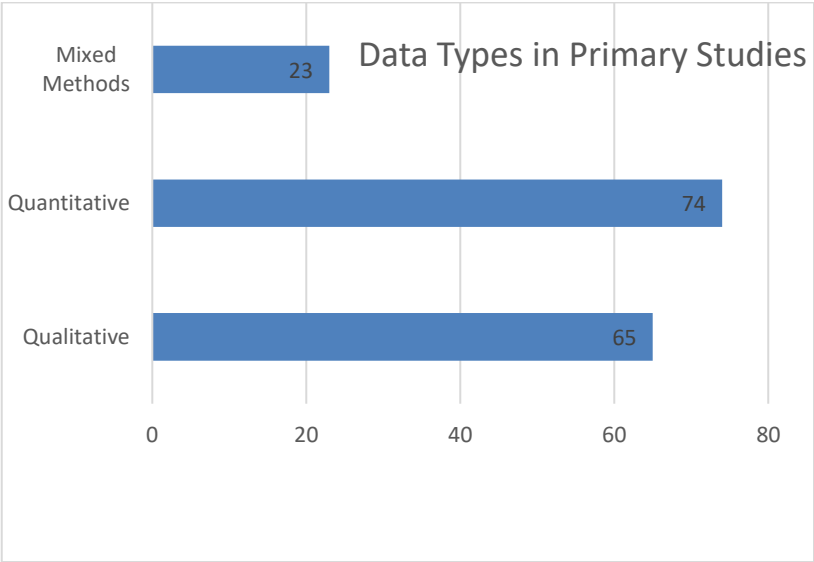
# Previous EBA-reports

2017:01 *Making Waves: Implications of the irregular migration and refugee situation on Official Development Assistance spending and practices in Europe*, Anna Knoll, Andrew Sherriff

2016:11 *Revitalising the Policy for Global Development,* Per Molander

2016:10, *Swedish Development Cooperation with Tanzania – Has It Helped the Poor?,* Mark McGillivray, David Carpenter, Oliver Morrissey, Julie Thaarup

2016:09,*Exploring Donorship – Internal Factors in Swedish Aid to Uganda,* Stein-Erik Kruse

2016:08, *Sustaining a development policy: results and responsibility for the Swedish policy for global development* Måns Fellesson, Lisa Román

2016:07, *Towards an Alternative Development Management Paradigm?* Cathy Shutt

2016:06 *Vem beslutar om svenska biståndsmedel? En översikt,* Expertgruppen för biståndsanalys

2016:05 *Pathways to change: Evaluating development interventions with Qualitative Comparative Analysis (QCA),* Barbara Befani

2016:04 *Swedish responsibility and the United Nations Sustainable Development Goals,* Magdalena Bexell, Kristina Jönsson

2016:03 *Capturing complexity and context: evaluating aid to education,*
Joel Samoff, Jane Leer, Michelle Reddy

2016:02 *Education in developing countries what policies and programmes affect learning and time in school?* Amy Damon, Paul Glewwe, Suzanne Wisniewski, Bixuan Sun

2016:01 *Support to regional cooperation and integration in Africa – what works and why?* Fredrik Söderbaum, Therese Brolin

2015:09 *In search of double dividends from climate change interventions evidence from forest conservation and household energy transitions,* G. Köhlin, S.K. Pattanayak, E. Sills, E. Mattsson, M. Ostwald, A. Salas, D. Ternald

2015:08 *Business and human rights in development cooperation – has Sweden incorporated the UN guiding principles?* Rasmus Klocker Larsen, Sandra Atler

2015:07 *Making development work: the quality of government approach,* Bo Rothstein and Marcus Tannenberg

2015:06 *Now open for business: joint development initiatives between the private and public sectors in development cooperation,* Sara Johansson de Silva, Ari Kokko and Hanna Norberg

2015:05 *Has Sweden injected realism into public financial management reforms in partner countries?* Matt Andrews

2015:04 *Youth, entrepreneurship and development,* Kjetil Bjorvatn

2015:03 *Concentration difficulties? An analysis of Swedish aid proliferation,* Rune Jansen Hagen

2015:02 *Utvärdering av svenskt bistånd – en kartläggning,* Expertgruppen för biståndsanalys

2015:01 *Rethinking Civil Society and Support for Democracy,* Richard Youngs

2014:05 *Svenskt statligt internationellt bistånd i Sverige: en översikt,* Expertgruppen för biståndsanalys

2014:04 *The African Development Bank: ready to face the challenges of a changing Africa?* Christopher Humphrey

2014:03 *International party assistance – what do we know about the effects?* Lars Svåsand

2014:02 *Sweden´s development assistance for health – policy options to support the global health 2035 goals,* Gavin Yamey, Helen Saxenian, Robert Hecht, Jesper Sundewall and Dean Jamison

2014:01 *Randomized controlled trials: strengths, weaknesses and policy relevance,* Anders Olofsgård