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Setting an Inclusive Framework for Human Security & Social Justice

within the IMF and GoL Restructuring
and Reform Plan: **Education an
Equalizer and Enabler**

⌘ Research Report January 2023





Preface

The Asfari Institute for Civil Society and Citizenship in partnership with Malala Fund and Issam Fares Institute for Public Policy and International Affairs launches a research project on the gendered implications of the IMF restructuring and reform plan on the education sector.

The report calls for reforming the public financial management and increasing fiscal space for education, mainly for the most vulnerable groups such as women and girls and segregated communities. This ultimately lays the foundation of a new social contract that invests in public social sectors and contributes to closing the gender gap.

This research project paves the way for a high level national policy dialogue that brings together all relevant stakeholders including and not limited to, government personnel and public officials, leaders in the non-profit sector, representatives from the UN family and international donors, and the general public.

The aim of the policy dialogue is to discuss the policy recommendations formulated during this research mission and explore their impacts in the Lebanese context.

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Executive Summary

- ❖ The burden of the Lebanese crisis is disproportionately being carried by the vulnerable. In 2021, 82 percent of Lebanon's residents were living in multidimensional poverty, especially due to the government's measures on rolling back subsidies and social safety nets.
- ❖ With the multitude of crises, adolescents and mainly girls, are facing major barriers to their movement and access to public spaces, most particularly education.
- ❖ Any recovery plan that fails to promote education as a social equalizer and enabler will jeopardize long-term prospects of sustainable recovery and social peace in addition to economic development.
- ❖ In MENA region cases such as Jordan and Tunisia, access to education for girls has been severely obstructed with the implementation of financial restructuring programs¹.
- ❖ IMF austerity may lead to adverse effects on financing the education sector which could impact teacher retention, children's dropouts, and overall quality of education.
- ❖ Providing national budget fiscal space and gender budgeting are approaches taken by the government to target gender gaps through the alignment of the needed resources for this objective.
- ❖ Lebanon is currently facing major challenges in the education sector and risks leaving adverse consequences on the education of the most marginalized i.e., women and girls.
- ❖ Policy recommendations in Lebanon should center on the principles of equity and intersectionality to cater to the needs of the most vulnerable groups, particularly women and girls.

1 Abuzaki, R. (2022). صندوق النقد الدولي ونساء لبنان أبعاد من التمييز... أسوأ من المعاناة. The Asfari Institute for Civil Society and Citizenship.

Introduction

Lebanon has been undergoing a multifaceted economic and social crisis since the start of the October 17th, 2019 protests. Triggered by decades of economic, financial, and fiscal policy mismanagement as well as by recurrent conflicts, the crisis, compounded by the repercussions of the war in Syria, the presence of more than 1.2 million refugees, the COVID-19 pandemic, and the Beirut Port explosion on August 4, 2020, was exacerbated by inadequate social protection systems and overall policy inaction.

Lebanon's estimated GDP per capita (by the end of 2020) has reverted to its level of the mid-90s. The unprecedented economic contraction and plummeting foreign exchange reserves have triggered triple-digit inflation, in addition to the recent disorderly removal of subsidies. Most of the population is now struggling to acquire basic goods and services. The rapid erosion of real income has pushed the highly skilled workforce to emigrate, thus depriving Lebanon of one of its most valuable resources for recovery: its talent base.

The burden of the crisis is disproportionately being borne by the poor and the middle class. In 2021, 82 percent of Lebanon's residents were living in multidimensional poverty, especially due to the government's measures on rolling back subsidies and social safety nets². More than 55 percent of Lebanese, 70 percent of Palestinians, and over 90 percent of Syrians live in poverty³. The unemployment rate increased from 11.4 percent in 2018-2019 to 29.6 percent in January 2022, indicating that almost one-third of the active labor force was unemployed in January 2022. Informal employment – employment that is not covered or is insufficiently covered by formal arrangements and protections – now accounts for over 60 percent of total employment in Lebanon⁴.

In the wake of the economic crisis, public service delivery further deteriorated which fueled mass migration, poor and worsening health, learning, and education outcomes, and weakened safety nets thus causing a human capital catastrophe⁵. Demand for public services such as hospitalization and education grew substantially (around 30 percent)⁶ putting more pressure on public institutions that saw, in this same period, their meager budget shrinking and their qualified personnel leaving. Increased demand has weakened the leverage public institutions have by increasing their costs and devaluing their revenues⁷.

The quick slide into the poverty of the Lebanese population was further accelerated by a crippled social protection system. Although Lebanon spends relatively more on social protection than its Arab neighbors (22.11 percent of budget expenditures)- a share below the OECD countries' average of 46.20 percent⁸ - this spending did not translate into the creation of social safety nets. According to a budget spending

2 UNOCHA. (2022). *Lebanon Emergency Response Plan 2021 - 2022 (August 2021)*. Retrieved from <https://www.humanitarianresponse.info/en/operations/lebanon/document/lebanon-emergency-response-plan-2021-2022-august-2021-enar>

3 UNICEF. (2021). *Lebanon: UNICEF survey highlights children's ever-worsening situation with dramatic deterioration of living conditions over six months*. Retrieved from <https://www.unicef.org/lebanon/press-releases/lebanon-unicef-survey-highlights-childrens-ever-worsening-situation-dramatic>

4 Silva-Leander, S., Pellerano, L., Eghnatios, R., & Raap, N. (2021). *Vulnerability and Social Protection Gaps Assessment – Lebanon*. ILO. https://www.ilo.org/wcmsp5/groups/public/---arabstates/---ro-beirut/documents/publication/wcms_820467.pdf

5 <https://documents1.worldbank.org/curated/en/394741622469174252/pdf/Lebanon-Economic-Monitor-Lebanon-Sinking-to-the-Top-3.pdf>

6 Institut des Finances Basil Fuleihan. (2021). *Social Protection Spending in Lebanon: A deep dive into state financing of social protection*. Retrieved from <http://www.institutdesfinances.gov.lb/publication/social-protection-spending-in-lebanon-a-deep-dive-into-the-state-financing-of-social-protection/>

7 World Bank. (2021). *Lebanon Economic Monitor: Lebanon Sinking (to the top 3)*. Retrieved from <https://documents1.worldbank.org/curated/en/394741622469174252/pdf/Lebanon-Economic-Monitor-Lebanon-Sinking-to-the-Top-3.pdf>

8 Institut des Finances Basil Fuleihan. (2021). *Social Protection Spending in Lebanon: A deep dive into state financing of social protection*. Retrieved from : <http://www.institutdesfinances.gov.lb/publication/social-protection-spending-in-lebanon-a-deep-dive-into-the-state-financing-of-social-protection/>

review conducted by the Institute of Finance Basil Fuleihan over the 2017-2020 period, this spending was not able to protect the most vulnerable nor to mitigate the increase in poverty rates, notably extreme poverty. Decades of investments in social protection have only benefited a fraction of the population leading to an upward redistribution of state finances in a regressive and unsustainable fashion. Moreover, coverage remains among the lowest and most inequitable. ILO data suggests that around 25 percent of the working population, of which 55 percent work in the informal sector, is not covered by any social protection scheme⁹. In terms of benefits, people in the lower five income deciles benefit from less than 15 percent of social protection services while the 20th richest percentile of the population reaps around 60 percent of social benefits. Gaps in protection affect the most vulnerable groups, particularly children and persons with disabilities¹⁰.

Among the sectors most impacted by the crisis is the education sector. UNICEF has reported in January 2022 that 31 percent of young people are not in education, employment, or training. Additionally, enrolment rates in overall education institutions have dropped from 60 percent in 2020-2021 to 43 percent, and enrolment rates of children aged between 15 and 18 dropped from 77 percent to 62 percent, with other UNICEF reports stating that people reduced spending on education to buy essential goods¹¹. Families are prioritizing basic needs over the education of their children, resulting in an increase in child labor and school dropouts. The Child Protection Working Group by UNICEF registered an increase in total referral numbers to Child Protection services, demonstrating the deteriorating situation of girls and boys. The working group registered more than 2,586 referrals made by education sector partners during the first half of 2022 compared to 311 referrals in the same period in 2021, which marks a 64 percent increase¹². More than 50 percent of the cases reported on child labor concern children working in “the worst forms of child labor”¹³. Additionally, child labor rates doubled from December 2020 to June 2022 (from 6 percent to 12 percent), with a one percent increase only between the first half of 2022¹⁴.

The crisis has made access to education for Lebanese students inequitable, further aggravating social injustice. With private schools increasing and partly dollarizing their tuition, and the cost of transportation rocketing, families are no longer able to afford to send their children to school. They are prioritizing the education of their sons over their daughters, placing girls and women at the borders of formal education¹⁵. With the multitude of crises, adolescents and mainly girls, are facing major barriers to their movement and access to public spaces. They are being further marginalized amid the multiple risks.¹⁶ UNICEF reports that children dropping out of education and learning

9 Silva-Leander, S., Pellerano, L., Eghnatios, R., & Raap, N. (2021). Vulnerability and Social Protection Gaps Assessment – Lebanon. ILO. https://www.ilo.org/wcmsp5/groups/public/---arabstates/---ro-beirut/documents/publication/wcms_820467.pdf

10 *Ibid.*

11 UNICEF. (2022). Lebanese crisis forcing youth out of learning, robbing them of their futures: UNICEF survey. Retrieved from <https://www.unicef.org/lebanon/press-releases/lebanese-crisis-forcing-youth-out-learning-robbing-them-their-futures-unicef-survey>

12 Lebanon: Inter-Agency - Child Protection Working Group - Monitoring Children's Situation between January and June 2022 (August 2022) - Lebanon. (2022, August 21). ReliefWeb. Retrieved from <https://reliefweb.int/report/lebanon/lebanon-inter-agency-child-protection-working-group-monitoring-childrens-situation-between-january-and-june-2022-august-2022>

13 *Ibid.*

14 *Ibid.*

15 Abuzaki, R. (2022). *أسوأ من المعاناة... أسوأ من التمييز... صندوق النقد الدولي ونساء لبنان أبعد من التمييز*. The Asfari Institute for Civil Society and Citizenship.

16 Youssef, S., Jones, N., Małachowska, A., & Saleh, M. (2003). Adolescents in the abyss of Lebanon's worst economic crisis. Retrieved from <https://www.gage.odi.org/wp-content/uploads/2022/09/Lebanon-Girls-Education-and-VA-WEB.pdf>

can “severely affect young people’s lifelong education and longer-term employment prospects” and that it has “serious implications for future growth and social cohesion in the country” if no action is taken.¹⁷

Given the current situation, macroeconomic stabilization is a must for Lebanon. It is a foundation to regain the trust of the Lebanese people and the international community, bring back confidence, and put the economy on a sustainable growth path. Critical structural reforms that address macro-economic and governance challenges are prerequisites for mobilizing international support as stated on several occasions by the international community at the CEDRE conference in 2018, then reconfirmed in the statements of the International Support Group for Lebanon (ISG).

Towards this end, the Lebanese government sought the financial and technical support of the International Monetary Fund (IMF). The staff-level agreement on comprehensive economic policies reached focused on areas including (1) restructuring the financial sector to restore banks’ viability and their ability to efficiently allocate resources to support the recovery; (2) proposing and implementing fiscal reforms coupled with the restructuring of the public debt to ensure debt sustainability and create space to invest in social spending, reconstruction and infrastructure (3) reforming state-owned enterprises, particularly in the energy sector; (4) enhancing public financial transparency and accountability through the strengthening of anti-corruption mechanisms and; (5) establishing a credible and transparent monetary and exchange rate system¹⁸.

Before the IMF staff-level agreement and the outburst of the economic crisis in Fall 2019, the Lebanese government had committed to undertake a series of reforms at the CEDRE conference in 2018, which, except for the public procurement reform, did not materialize.¹⁹

Given the fragile context Lebanon is facing today, it is important, in the event of an IMF program, that the latter integrates a social justice and human security lens in each of the prospective reforms. It is believed that any recovery plan that fails to promote education as a social equalizer and enabler will jeopardize long term prospects of sustainable recovery and social peace in addition to economic development. Exacerbating social injustice may in turn contribute to weakening security and to fueling inequalities and injustices, hitting particularly women and girls.²⁰

Evidence around the world shows that austerity in low and middle income countries is a policy decision that women and girls pay the price for. Poor people in vulnerable environments – mainly women, girls and other marginalized groups – bear heavily the costs of reforms compared to higher income groups and corporations²¹. According to a report prepared by the Asfari Institute for Civil Society and Citizenship²², cutting back public expenditures on education in a patriarchal environment, coupled with intensifying economic conditions places a lot of pressure on women and more importantly, threatens them, because they have a greater need for some services (e.g. access to SRHR) and because they ‘pick up the slack’ when public services are

17 UNICEF. (2022). *Lebanese crisis forcing youth out of learning, robbing them of their futures: UNICEF survey*. Retrieved from <https://www.unicef.org/lebanon/press-releases/lebanese-crisis-forcing-youth-out-learning-robbing-them-their-futures-unicef-survey>

18 Amr, W. (2022). IMF reaches staff-level agreement on economic policies with Lebanon for a four-year extended fund facility. International Monetary Fund. Retrieved from <https://www.imf.org/en/News/Articles/2022/04/07/pr22108-imf-reaches-agreement-on-economic-policies-with-lebanon-for-a-four-year-fund-facility>

19 French Embassy in Lebanon. Economic Conference for Development through Reforms with the Private sector. (2018). Retrieved from https://www.diplomatie.gouv.fr/IMG/pdf/cedre_statement-en_final_ang_cle8179fb.pdf

20 Amr, W. (2022). IMF reaches staff-level agreement on economic policies with Lebanon for a four-year extended fund facility. International Monetary Fund. Retrieved from <https://www.imf.org/en/News/Articles/2022/04/07/pr22108-imf-reaches-agreement-on-economic-policies-with-lebanon-for-a-four-year-fund-facility>

21 The assault of austerity: How prevailing economic policy choices are a form of gender-based violence. Oxfam Policy & Practice. (2022). Retrieved January 10, 2023, from <https://policy-practice.oxfam.org/resources/the-assault-of-austerity-how-prevailing-economic-policy-choices-are-a-form-of-g-621448/>

22 Abuzaki, R. (2022). *مندوق النقد الدولي ونساء لبنان أبعد من التمييز... أسوأ من المعاناة*. The Asfari Institute for Civil Society and Citizenship.

in decline (e.g. caring for the sick and elderly). In this vein, it has been concluded that women tend to find more job opportunities when they attain higher levels of education; which is not the case for men.

While structural reforms may entail a reduction of spending by the government as part of the IMF-sponsored austerity measures, for Lebanon, such structural reform should carefully consider providing the necessary social safeguards to prevent the erosion of the education sector. This comes without considering the detrimental gendered short-term and long-term consequences they impose on women and girls. It is feared that if austere measures are imposed, the minimal spending on social protection, healthcare, and education risk to be further reduced thus severely affecting those who are suffering the most usually, namely: women and girls.

This report provides analysis and proposals to integrate the social justice and human security lens into the IMF and government reform plans and promote education as a social equalizer and an essential pillar to sustainable peace and economic development, enhancing security and reducing political, economic, and social inequalities and injustices.

Secondly, it reflects on the experiences of MENA countries with IMF restructuring plans and draws attention to the shift in intervention mechanisms that the IMF has undergone in the last decades. Thirdly, the report presents the gendered impacts of restructuring and austere programmes on social components and education and provides examples of strategies that make the best out of the implementation of these programs. Finally, the report dives into the Lebanese context of the education sector and provides a list of policy recommendations that the Lebanese government could adopt to protect vulnerable groups from falling through the cracks of mismanagement.

The report invites all relevant stakeholders to acknowledge that women's and girls' education is an essential pillar of economic development, and this can only be achieved by reforming and restructuring the public education sector, responsibly and sustainably investing in social protection and social systems, and contributing to tightening the gender gap in Lebanon.

Social Justice and Human Security Lens

Social justice is the fair and just distribution of opportunities, wealth, and prerogatives to all individuals of society equitably and the guarantee that all individuals are achieving their fullest potential within a safe environment. Social justice became the distinction between the economic and social spheres and focused on the equal distribution of resources among human beings²³. While economic justice seeks to distribute wealth and meaningful work over the population, the United Nations considers it a necessary pillar of the large umbrella of social justice which highlights the importance of the social perspective in human affairs²⁴.

The UN General Assembly defines human security in resolution 66/290 as “an approach to assist Member States in identifying and addressing widespread and cross-cutting challenges to the survival, livelihood and dignity of their people”. Human security calls for “people-centered, comprehensive, context-specific and prevention-oriented responses that strengthen the protection and empowerment of all people”²⁵. Human security developed into a concept that no longer focused on territorial and military security, but rather achieved freedom from fear and freedom from want. Rethinking the concept of human security sought to place human dignity and freedom as the root for all human activity.²⁶

These prerogatives are legally enshrined in the Declaration on the Right to Development whereby all human beings have the right to development irrespective of their race, sex, language, or religion²⁷. Article 8 (1) of the Declaration targets women specifically, claiming that “effective measures should be undertaken to ensure that women have an active role in the development process”. Gender equality and women empowerment are seen as focal pillars to economic and human development, and not only through the involvement of women in economic development but through enhancing their well-being, the implementation of human rights standards, curbing all sorts of gender-based violence, and the involvement of women in all phases of development²⁸.

Attaining social justice and ensuring human security have become inalienable pillars for human development and achieving gender parity on a global scale. Consequently, addressing the gender gap in labor opportunities is necessary in order to understand how it manifests in income inequality and social mobility.²⁹

Gender equality is a matter of social and economic justice: it calls for allowing equitable access to resources, opportunities, and rights and legitimizing this access through gender-responsive policies and programmes. When countries face crises and seek the support of international financial institutions (such as the IMF), these institutions aim at supporting countries in addressing the debt crisis by incorporating international markets, implementing restrictive monetary policies, liberalizing trade,

23 United Nations. (2006). Social Justice in an Open World: The role of the United Nations. Retrieved from <https://www.un.org/esa/socdev/documents/ifsd/SocialJustice.pdf>

24 *Ibid.*

25 United Nations Trust Fund for Human Security. (n.d.). What is Human Security. Retrieved from <https://www.un.org/humansecurity/what-is-human-security/>

26 Inter-American Institute for Human Rights. (2010). What is Human Security? Retrieved from: https://www.iidh.ed.cr/multic/default_12.aspx?contenidoId=ea75e2b1-9265-4296-9d8c-3391de83fb42&Portal=IIDHSeguridadEN

27 OHCHR. (n.d.). Declaration on the Right to Development. Retrieved from <https://www.ohchr.org/en/instruments-mechanisms/instruments/declaration-right-development>

28 OHCHR. (n.d.). Gender and the right to development. Retrieved from https://www.un.org/en/events/righttodevelopment/pdf/infonote_rtd_and_gender.pdf

29 UNDP. (n.d.). Transforming the Future of Work for Gender Equality Initiative. Retrieved from <https://www.undp.org/asia-pacific/transforming-future-work-gender-equality-initiative>

and controlling inflation to close the budget and balance of payment deficit. However, some economists argue that economic crises are highly driven by the absence of women in the job market, and the gender-blind policies that are advertised by these programs³⁰. For example, little attention used to be given by governments and IFIs to the impacts of policy changes on unpaid labor and the unpaid reproductive economy that women are bound to.³¹ Additionally, societal and cultural norms along with the institutional policies prevent women from being active members of the workplace and normalize women's inability to reach financial freedom and equal pay as men³². It also limits their abilities to climb the ladder of leadership at work.³³

Sustainable economic policies allow humans, and specifically women, to lead a life that is free of discrimination and inequalities; social safeguards affect macroeconomic policies and therefore, it is imperative to consider the gender biases in policies. From a gender perspective, policies must be built based on their ability to bring society towards social justice and human development. This can only be achieved through integrating social goals relevant to distributive fairness and gender equity.³⁴

Income inequality and gender inequality are intertwined because a large part of this inequity is related to access to education. In addition, individuals working in informal work are less likely to receive a quality education or training and vice-versa, and individuals who do not have access to training and education, are more likely to be employed within the informal sectors. Consequently, access to equal education opportunities is both a cause and a consequence within equation³⁵.

Social mobility is the transition in the economic, social, and cultural status of an individual from their childhood to their adult life. For example, upward social mobility includes instances where children of families from an underprivileged socio-economic background grow to move into a better status than that of their parents³⁶. Education and social mobility are two important indicators to understand the equality of opportunity. Additionally, education attainment alone is not enough to positively impact social mobility and overcome gender inequalities in economic life, but the education system must be equitable among different groups, especially women and girls, to curb income discrepancies. This is because, in many countries, ensuring gender equality in educational attainment does not eliminate gender inequalities in the labor market. Subsequently, patriarchal attitudes sometimes codified in discriminatory policies play a pervasive role in creating a greater impact in shaping the participation of women in the labor market, especially in developing and transitioning contexts³⁷.

According to the World Bank, there is a significant correlation between education and women's participation in the workforce. However, the participation of men in the workforce hardly changes in correlation to the level of education. Women's participation in the workforce is strongly influenced by their level of education, where obtaining a college degree increases the participation rate significantly³⁸.

30 Berik, G., van der Meulen Rodgers, Y., & Zammit, A. (Eds.). (2008). *Social Justice and Gender Equality: Rethinking Development Strategies and Macroeconomic Policies* (1st ed.). Routledge. <https://doi.org/10.4324/9780203892602>

31 *Ibid.*

32 UNDP. (n.d.). *Transforming the Future of Work for Gender Equality Initiative*. Retrieved from <https://www.undp.org/asia-pacific/transforming-future-work-gender-equality-initiative>

33 *Ibid.*

34 Berik, G., van der Meulen Rodgers, Y., & Zammit, A. (Eds.). (2008). *Social Justice and Gender Equality: Rethinking Development Strategies and Macroeconomic Policies* (1st ed.). Routledge. <https://doi.org/10.4324/9780203892602>

35 O'Toole, J., & Elawady, M. (2022). *Inequality in the Arab region: A ticking time bomb*. UN ESCWA. Retrieved from <https://reliefweb.int/report/lebanon/inequality-arab-region-ticking-time-bomb-enar>

36 OECD (2018), *Equity in Education: Breaking Down Barriers to Social Mobility*, PISA, OECD Publishing, Paris, <https://doi.org/10.1787/9789264073234-en>

37 Luke, Nancy, 'Gender and Social Mobility: Gender Attitudes and Women's Labour Force Participation', in Vegard Iversen, Anirudh Krishna, and Kunal Sen (eds), *Social Mobility in Developing Countries: Concepts, Methods, and Determinants* (Oxford, 2021; online edn, Oxford Academic, 23 Dec. 2021), <https://doi.org/10.1093/oso/9780192896858.003.0015>

38 The World Bank & UN Women. (2021). *The status of women in Lebanon: Assessing women's access to economic opportunities, human capital accumulation and agency*. Retrieved from <http://hdl.handle.net/10986/36512>

Access to education does not solely rely on making education affordable but also on making educational institutions safe spaces and environments for women and girls to learn and creating a new cultural attitude towards the education of girls, especially in rural and remote areas. Marginalization, poverty, child marriage, and the discriminatory attitudes people hold against women are among the major challenges that create setbacks for women to complete their education³⁹. The pandemic has further deepened this gap in education between girls and boys. It is through learning that sexist attitudes and norms are demolished in communities, and societies are transformed into safe spaces where both genders are equal in terms of opportunities⁴⁰.

Considering the above, the International Monetary Fund (IMF) has recently shifted gears in analyzing the relationship between gender inequality and limitations on inclusive growth development⁴¹. IMF programs and research papers have begun to use the language of empowering women by declaring their rights and promoting gender equality⁴². The goal is to attain financial and macroeconomic stability without compromising the importance of gender equality to development and inclusive societies. Thus, these programs are aiming to work on boosting the female force in labor to promote financial equality and setting recommendations for the government to decrease gender disparities. These include the elimination of tax-induced disincentives for secondary earners, making education programs more inclusive, and reforming policies relevant to gender discrimination⁴³. The IMF increasingly considers that bridging the gender gaps in developing countries can strengthen economies and social stability and positively impact people's lives⁴⁴. Hence, there lies an undeniable responsibility on both the IMF and the national government to safeguard gender equity, social justice and human security.

39 UNESCO. (2019). *From access to empowerment: UNESCO strategy for gender equality in and through education 2019-2025*. Retrieved from <https://unesdoc.unesco.org/ark:/48223/pf0000369000>

40 *Ibid.*

41 The World Bank. (2020). *Women's economic empowerment and the impact of COVID-19 - The IMF's role and legal developments*. Retrieved from <https://www.worldbank.org/en/events/2020/10/29/ljdweek2020-womens-economic-empowerment-and-the-impact-of-covid-19>

42 International Monetary Fund. (2022). *How empowering women supports economic growth*. Retrieved from <https://www.imf.org/en/Blogs/Articles/2022/03/07/how-empowering-women-supports-economic-growth>

43 International Monetary Fund. (2018). *Pursuing women's economic empowerment*. Retrieved from <https://www.imf.org/en/Publications/Policy-Papers/Issues/2018/05/31/pp053118pursuing-womens-economic-empowerment>

44 International Monetary Fund. (n.d.). *Women's empowerment and the IMF*. Retrieved from <https://www.imf.org/external/pubs/ft/gender/imfwomensempowerment.pdf>

The International Monetary Fund, Austerity, and Its Gendered Shortcomings

For countries trying to develop resilience against economic crises, governmental intervention in its spending habits becomes the responsibility of governments that design decisions that impact societal outcomes. Throughout history, studies have recorded two main contrasting approaches of economic reforms in response to crisis: (1) austerity and (2) economic stimulus - the implementation of which is relative to the economic and political state of the country under study⁴⁵.

Austerity measures are phenomena-specific large-scale decisions observed in both developed and developing countries in response to governmental debts and economic crises, like countries borrowing from the International Monetary Fund (IMF)⁴⁶. In negotiating loan packages, the IMF - sometimes with the support of the government - focuses on the shrinking of social spending, deregulation of labor and trade, on increasing tax revenue while improving the tax policy design⁴⁷. In some cases, this may impact the immediate well-being of the public⁴⁸.

Though austerity plans are defined as “medicine intended to reduce symptoms of debts and deficits and to cure recessions”, existing literature and lived experience suggests dire consequences of such reforms on social justice, safety nets, and equity, specifically within the realms of health, poverty, food safety, and education. Austerity measures that decrease public spending and strip away full social support services in favor of social support networks not only entrench poverty and inequality but also exacerbate gender inequality⁴⁹. Indeed, when governments reduce public spending on education and healthcare, women are automatically foreseen to double on unpaid care work at home because gender norms tend to dictate that they make up the shortfall in services that the state has created by stepping back. In addition to spending cuts limiting the supply of education (for example by retrenching teachers, and cutting back capital investment in education), the fall in the purchasing power of families resulting from higher taxes, fewer social security services, and higher unemployment results in families prioritizing the education of male family members at the expense of female members⁵⁰.

45 Paes-Sousa, R., Schramm, J. M., & Mendes, L. V. (2019). Fiscal austerity and the health sector: The cost of adjustments. *Ciência & Saúde Coletiva*, 24(12), 4375–4384. <https://doi.org/10.1590/1413-812320182412.23232019>

46 Postiglione, G. A. (2011). *Global recession and higher education in eastern Asia: China, Mongolia and Vietnam*. *Higher Education*, 62(6), 789–814. <https://doi.org/10.1007/s10734-011-9420-4>

47 International Monetary Fund. (2023). *Lebanon: Technical Assistance Report on Putting Tax Policy Back on Track*. Retrieved from <https://www.imf.org/en/Publications/CR/Issues/2023/01/13/Lebanon-Technical-Assistance-Report-on-Putting-Tax-Policy-Back-on-Track-528121>

48 Paes-Sousa, R., Schramm, J. M., & Mendes, L. V. (2019). *Fiscal austerity and the health sector: The cost of adjustments*. *Ciência & Saúde Coletiva*, 24(12), 4375–4384. <https://doi.org/10.1590/1413-812320182412.23232019>

49 Abuzaki, R. (2022). *صندوق النقد الدولي ونساء لبنان أبعد من التميش... أسوأ من المعاناة*. *The Asfari Institute for Civil Society and Citizenship*.

50 Ibid.

There are many reasons why austerity tends, oftentimes disproportionately in comparison to men, to affect women. Even if women overcome gender norms and their larger charge of unpaid work at home, their jobs tend to guarantee fewer protections⁵¹. As outlined previously, employed women have less job security and fewer benefits accorded to them, and are therefore more likely to lose their jobs in times of economic hardship. Policies designed to lift subsidies without considering their gendered dynamics affect women's labor force participation. For instance, men-led households are more likely to prioritize transportation for the male breadwinner to get to work than for a wife's needs. In a similar vein, floating currencies, another IMF-encouraged policy designed to increase foreign investment, tend to increase inflation. Female hygiene products and contraception tend to fall victim to higher prices and can fall onto the black market, where they are susceptible to becoming less safe⁵².

The Office of the High Commissioner for Human Rights produced a report on the impact of austerity on economic, social, and cultural rights which found that austerity measures are detrimental to social protection policies through retrograde policies that target regressing spending on vital sectors and increasing taxes whether direct or indirect⁵³.

Though thought initially reported as successful in decreasing inequality, the IMF admits that the consequences of austerity were not properly estimated and that the relationship between tax administration and inequality is quite variable⁵⁴. Said inequalities are partly the aftermath of the main goal of austerity plans – attaining revenue targets, which requires an increase in tax rates. The latter is also seen to be involved in reducing personal motivation to invest and accumulate capital, as well as igniting the drive to expand the informal employment sector to avoid increasing dire tax rates.

However, the IMF thinking has shifted immensely vis-a-vis social policies relevant to social safeguards and gender; and this has reflected well in the design fund supported programs where spending floors are set to help ensure the adverse consequences of reforms are mitigated⁵⁵. The IMF has become increasingly aware of the negative impact its austerity measures have on women, as well as that it must encourage gender-inclusive policies in its structural adjustment programs (SAPs)⁵⁶. It has also made commitments to support UN Sustainable Development Goals for gender inclusivity⁵⁷. However, the consensus of studies on the subject, find that despite these commitments, the real-life effects of austerity and, to a lesser extent, SAPs, do not support these claims⁵⁸. IMF research and policy development appears not to have translated into practice, yet.

51 Human Rights Watch. (2022). IMF: Prioritize social protection in Egypt loan talks. Retrieved from <https://www.hrw.org/news/2022/04/04/imf-prioritize-social-protection-egypt-loan-talks>

52 *Ibid.*

53 OHCHR. (2013). Report on austerity measures and economic and social rights. Retrieved from https://www.ohchr.org/sites/default/files/E-2013-82_en.pdf

54 Fabrizio, S., Furceri, D., Garcia-Verdu, R., Li, B. G., Lizarazo, S. V., Mendes Tavares, M., Narita, F., & Peralta-Alva, A. (2017). *Macro-structural policies and income inequality in low-income developing countries*. International Monetary Fund. Retrieved from: <https://www.imf.org/en/Publications/Staff-Discussion-Notes/Issues/2017/01/26/Macro-Structural-Policies-and-Income-Inequality-in-Low-Income-Developing-Countries-44526>

55 *Ibid.*

56 Abdo, N., Abed, D., & Ayoub, B. (2020). The IMF and Lebanon: The long road ahead. OXFAM International, 28. <https://oxfamilibrary.openrepository.com/bitstream/handle/10546/621062/bp-imf-lebanon-economy-crisis-121020-en.pdf>

57 *Ibid.*

58 *Ibid.*

The Case of Selected MENA Countries

Many countries of the Middle East and North Africa (MENA) region have had experience with IMF-advised structural reform programs. The most recent waves of programs have been generally spurred by post-Arab Spring economic conditions, the COVID-19 pandemic, and in many cases food insecurity because of Russia's invasion of Ukraine. Economic difficulties that resulted from the Arab Spring were key drivers for countries to seek the support of IMF restructuring programs; examples include Egypt, Tunisia, and Jordan⁵⁹.

All three countries witnessed reduced public spending on social protection and increased taxes – especially indirect or value-added taxes, ultimately exacerbating inequalities vis-à-vis women. In Tunisia, austerity measures involved reducing public spending on education from 26.6 percent to 17.7 percent of the government budget from 2011 to 2019; in Jordan, public spending on healthcare decreased from 5.6 percent to 3.4 percent between 2011 and 2016; in Egypt, unpaid work has extensively increased post-austerity measures which fuels macroeconomic implications⁶⁰. In fact, the MENA (3.2 percent) region spends dramatically lower than the EU (11.1 percent) and North America (13.1 percent)⁶¹ on education. Case studies from the MENA region are presented in the below boxes.

Jordan: Expenditure cuts on the health and education sector

Government spending on public health as a share of GDP has been on the decline while personal spending on healthcare is steadily on the rise. The application of austerity measures has deteriorated the education sector in Jordan – more particularly, it has set women on the sidelines of receiving a high-quality education. In 2019, 12.54% of the government's expenditures were allocated to the education sector in Jordan⁶². The IMF does attest that "investments in education and health can help reduce income inequality over the medium term⁶³." However, proposing to cut back on expenditures as a policy only aggravates shortfalls in social services. Jordan's social spending on education has decreased from 12.15% in 2016 to 9.86% in 2019. This led to the income gap between men and women in Jordan to further grow. For instance, male-headed households earn 15% more than female-headed households⁶⁴.

Social mobility has become harder to achieve and job opportunities have been made even less accessible to the women who seek them. The rate of women's labor participation in Jordan is 14%, one of the lowest globally⁶⁵. Additionally, female Syrian refugees are constantly exposed to abuse and cultural norms preventing them from accessing education in Jordan. With austerity measures advocated for the IMF, the access that these girls have to education has significantly reduced. The increasing enrollments in private schools – a result of underfunding the educational sector – imposes burdens on low-income families to meet the expenses.

59 Reuters Staff. (2020). *Jordan agrees \$1.3 billion IMF programme: state news agency*. Retrieved from <https://www.reuters.com/article/us-jordan-economy-imf/jordan-agrees-1-3-billion-imf-programme-state-news-agency-idUKKBN1ZT293>

60 Abuzaki, R. (2022). *صندوق النقد الدولي ونساء لبنان أبعد من التمييز... أسوأ من المعاناة*. The Asfari Institute for Civil Society and Citizenship.

61 World Bank. (2022). *Government expenditure on education, total (% of GDP) - Middle East & North Africa*. Retrieved from <https://data.worldbank.org/indicator/SE.XPD.TOTL.GD.ZS?end=2019&locations=ZQ&start=2004>

62 Abdo, N. (2019). *The gendered impact of IMF policies in MENA: The case of Egypt, Jordan and Tunisia*. *Oxfam International*. <https://doi.org/10.21201/2019.5143>

63 UNESCO. (2009). *The impact of the crisis on public expenditure on education: Findings from the UNESCO quick survey*. Retrieved from <https://unesdoc.unesco.org/ark:/48223/pf0000183667>

64 Hattar-Pollara, M. (2019). *Barriers to education of Syrian refugee girls in Jordan: Genderbased threats and challenges*. *Journal of Nursing Scholarship*, 51(3), 241–251. <https://doi.org/10.1111/jnu.12480>

65 Overview. *World Bank*. (2022, May).

Tunisia: Expenditure cuts on the education sector

In Tunisia, public services have deteriorated, with more people resorting to the private sector. Additionally, debt servicing nearly quadrupled in absolute terms between 2012 and 2018⁶⁶. The International Monetary Fund approved an economic reform program put forward by the Tunisian government in 2012 and obtained a loan with a total value of USD 1.74 billion that was disbursed in tranches for a period of two years. Four years later, a USD 2.88 billion loan was granted in 2016, to be disbursed over a period of 4 years⁶⁷. Upon implementation of the restructuring plan, the poverty rate increased from 20.5% in 2010 to 15.2% in 2019, reaching 33% (4 million Tunisians, according to the Ministry of Social Affairs) in 2022⁶⁸. In Tunisia, between 2011 and 2019, the share of education financing in the public budget decreased from 26.6% to 17.7%, and the share of health expenditures decreased from 6.6% in 2011 to 5% in 2019⁶⁹.

Gendered Implications of Austerity on Education

IMF restructuring programs were originally built on implementing austerity measures in the national budget, including cutbacks in the education sector budgets. IMF reforms and austerity measures have different impacts on different groups. Children, especially girls, are among the most affected. Some IMF programs may increase the impoverishment of already vulnerable individuals leading to rises in the incidence of child labor, and child marriage. Moreover, compliance with these reforms was seen to increase poverty within households and families which may force children out of schools and into the labor force as well to bring in income⁷⁰. It is also suggested that the reforms on social welfare and expenditure cuts recommended during IMF programs negatively impact child labor⁷¹.

IMF austerity may lead to cuts in public spending on education thus impacting teacher retention, children's dropouts, and overall quality of education. Many reports have warned against the adoption of "IMF-type budgets" that lead to harsh consequences on the education sector.⁷²

With decreased spending on education, implementing austere measures will only contribute to the fallout of the sector. On the contrary, reshuffling budgeting, re-prioritizing expenditures, and increasing efficiency and value for money may optimize spending without compromising outcomes. Thus, an approach that privileges budget reviews focused on quality, accessibility and inclusivity may lead to better results without undermining the future of children's education.

The note published by the IMF in June 2018 based on the policy recommendations of a 2017 IMF Board, provides operational guidance⁷³ to staff on how to engage on social safeguard issues with low-income countries in both program and surveillance

66 Abuzaki, R. (2022). *مندوق النقد الدولي ونساء لبنان أبعد من التهميش... أسوأ من المعاناة*. The Asfari Institute for Civil Society and Citizenship.

67 Ibid.

68 Ibid.

69 Ibid.

70 Mark, B. S., Ye, H.-J., Foote, A., & Crippin, T. (2021). It's a hard-knock life: Child labor practices and compliance with IMF agreements. *Social Sciences*, 10(5), 171. <https://doi.org/10.3390/socsci10050171>

71 Ibid.

72 Rowden. (2021). *Impacts of IMF Policies on National Education Budgets and Teachers*. Retrieved from <https://bit.ly/3R3pY0X>

73 IMF. (2018). *Guidance Note on IMF Engagements on Social Safeguards in Low Income Countries*. Retrieved from <https://www.imf.org/en/Publications/Policy-Papers/Issues/2018/07/11/pp061418guidance-note-on-imf-engagement-on-social-safeguards-in-lics>

contexts. The note recommends the setting of minimum floors on social and other priority spending, wherever possible – social spending is defined as spending on education, health, and social protection – with social protection comprising social safety nets (or social assistance) and social insurance. Another priority spending generally includes high-priority projects that support national poverty reduction and growth strategies. This guidance aims at mitigating potentially adverse effects of adjustment measures on vulnerable groups, and stronger policies that safeguard health and education spending and strengthen social safety nets⁷⁴. They seek to accommodate country-specific circumstances and national priorities and guide the discussion of how program design and conditionality may help achieve the desired social safeguard goal.

Given the aggravating deterioration of the education sector, observing the guidance of this note is of major significance in designing any IMF program for Lebanon.

Budgeting education: Compromising knowledge and learning

The Ministry of Education and Higher Education in Lebanon only received 9.89% of budget expenditures in 2020 (1,953 to a total budget of 19,731 billion LBP), having a 6.3% decrease from 2019⁷⁵, while the latest budget for the year 2022 discloses a further decrease in expenditure for education, decreasing to 5% of the total budget. Other countries in the MENA region seem to face the same issue of minimal budget spending for education. Egypt's budget for the year 2020/2021 displays similar percentages with the budget going to education being 8.3% (132 of a total of 1575 billion LE).⁷⁶ In addition, the budget of Jordan for the year 2022 displays that 12% of the budget is given to education⁷⁷. Finally, the 2022 state budget in Syria shows that 8.3% of budget allocations are spent on education.⁷⁸ Similar to Lebanon, these countries from the MENA region have most of their budget spent on general public services or social protection or in Syria's case, the economy and finance service functions. Compared with the Global North, their government expenditure on education provides a better understanding of where the governments from the MENA could be lacking.

74 Rowden. (2021). *Impacts of IMF Policies on National Education Budgets and Teachers*. Retrieved from <https://bit.ly/3RgpYOX>

75 Republic of Lebanon, Ministry of Finance. (2020). *Citizen budget 2020*. Retrieved from [Q](#)

76 Arab Republic of Egypt, Ministry of Finance. (2021). *The citizen budget 2020/2021*. Retrieved from <https://www.mof.gov.eg/en/posts/stateGeneralBudget/5fdd5876c21a6d0007c0277f/The%20Citizen%20Budget%202020%2021>

77 The Hashemite Kingdom of Jordan, General Budget Department. (2022). *The citizen guide to the budget has been incorporated with the budget in-brief document starting from 2016*. Retrieved from <https://gbd.gov.jo/en/citizen-guide>

78 UNICEF. (2022). *The 2022 state budget in Syria*. Retrieved from <https://www.humanitarianresponse.info/en/operations/syria/document/unicef-brief-2022-state-budget-syria>

Education Policy Recommendations to Guarantee Social Justice Amid Austerity

As a result of the rapid worldwide geopolitical and economic challenges, more than 150 countries are currently implementing austerity measures through a series of policies, programs, and projects directed towards the population⁷⁹. However, to ensure that the rights of vulnerable groups to social protection are preserved and to prevent the escalation of accumulated societal issues, well-designed policies which support efficient and inclusive outcomes must be adopted by the local government as financial policies could either exacerbate or narrow gender disparities⁸⁰. For instance, women suffer substantially more deprivations than men during the implementation of austerity measures as they become more vulnerable due to changes in the country's legal equality structures: increases in all forms of violence against women, extreme financial hardships, job losses, and loss of benefits are the most prominent negative consequences of austerity measures which call for the adoption of specific policies to ensure that social protection remains intact⁸¹.

Providing National Fiscal Space for Education

Providing fiscal space allows the country to have a larger maneuver when allocating necessary resources for the desired goals. Fiscal space is needed to better manage macroeconomic imbalances, financial shocks, and crises of various natures that require emergency spending. For example, during the outbreak of the COVID-19 pandemic, governments were required to reprioritize their expenditures to create room for priority spending. Good public financial management was instrumental in ensuring emergency relief and meeting governmental obligations⁸².

Overall, a shift from budgeting by line items to program-based budgets allows better allocations and tracing of public resources, and effective responses to emerging needs. Strengthening the PFM mechanisms and capacities is an instrument for improving public spending on education.

79 Ortiz, I., & Cummins, M. (2021). Global austerity alert: Looming budget cuts in 2021-25 and alternative pathways. *SSRN Electronic Journal*. <https://doi.org/10.2139/ssrn.3856299>

80 International Monetary Fund. (2022). *Strategy toward mainstreaming gender*. Retrieved from <https://www.imf.org/-/media/Files/Publications/PP/2022/English/PPEA2022037.ashx#:~:text=Washington%2C%20DC%20%E2%80%93%20July%2022%2C,in%20accordance%20with%20its%20mandate>.

81 Lethbridge, J. (2012). Impact of the global economic crisis and austerity measures on women, public services international research unit. Retrieved from https://www.world-psi.org/sites/default/files/documents/research/en_austerity_women.pdf

82 Saxena, S., & Stone, M. (2020). Preparing public financial management systems to meet Covid-19 challenges. *IMF Blog*. Retrieved from <https://blog-pfm.imf.org/en/pfmblog/2020/03/preparing-public-financial-management-systems-to-meet-covid-19-challenges>

Rwanda: Economic Development and Poverty Reduction Strategy – EEDPRS 2

The EEDPRS 2 (Economic Development and Poverty Reduction Strategy 2), a program in Rwanda that covered the period 2013-2018 on account of the government's consolidation program and aims to achieve long-term economic development in the country, has set a series of policy objectives to attain its goal⁸³. The EEDPRS 2 has expressed its commitment to developing the education sector as a priority for it believes it is the basis of a structural change in the country. The program outlined its objectives for the next five years to follow which allowed it to ensure the space needed in the state's budget to implement its strategy. As a result of this program, the literacy rate of young females in Rwanda (ages 15-24) which amounted to 78% in 2010 has risen to 89% in 2018.⁸⁴ According to the country's Ministry of Finance and Economic Planning, The Gender parity in net enrollment rate for primary school had been achieved and it is slightly higher for girls (87%) than for boys (85%)⁸⁵. Investments directed towards the education sector and gender equality within the aforementioned sector, in particular, positively reshape national labor activity and, in turn, promote sustainable growth⁸⁶. A better tax collection and consumption rate generated by the increased level of labor activity would be beneficial to the state's budget.

Gender Budgeting

The adoption of compulsory and free education without adequate financial resources and complementary measures undermines budget credibility. Therefore, specific frameworks and relevant reforms of the budget legislation need to accompany the explicit allocation of necessary resources⁸⁷.

Gender budgeting and gender equality are two much aligned concepts since gender budgeting (a form of priority budgeting) is an approach taken by the government to target gender gaps through the alignment of the needed resources for this objective. More than 80 gender budgeting efforts have been made worldwide⁸⁸.

Gender-responsible fiscal policy interventions are believed to generate considerable societal benefits⁸⁹. It has supported gender equality in sectors such as education and boosted economic growth⁹⁰.

83 African Development Bank, Organisation for Economic Co-operation and Development, United Nations Development Programme, United Nations Economic Commission for Africa (2012).

84 UNESCO Institute for Statistics, data as of June 2022.

85 The Republic of Rwanda, Ministry of Finance and Economic Planning. (2007). Economic development and poverty reduction strategy, 2008-2012, Retrieved from <http://www.rcsprwanda.org/IMG/pdf/EDPRS-English.pdf>

86 Fabrizio, S., Fruttero, A., Gurara, D., Kolovich, L., V., Tavares, M. M., & Tchelishvili, N. (2020). Women in the Labor force: The role of fiscal policies, <https://www.imf.org/-/media/Files/Publications/SDN/2020/English/SDNEA2020003.ashx>

87 UNESCO. (2022). *Protect her rights, strengthen your laws: Her Atlas: status report on girls' and women's right to education*. Retrieved from <https://unesdoc.unesco.org/ark:/48223/pf0000382158>

88 Stotsky, J. G. (2016). Gender budgeting: Fiscal context and current outcomes. International Monetary Fund. Retrieved from <https://www.imf.org/external/pubs/ft/wp/2016/wp16149.pdf>

89 *Ibid*

90 *Ibid*.

Gender-responsive legal frameworks (national constitutions, legislations, and regulations) have proven to curb gender disparities in education. Formally recognizing and enshrining the right to education without any discrimination in a constitution or law could trigger judicial measures if someone infringes on it. The implementation of free and compulsory education goes beyond the sole legal guarantee: it requires allocating sufficient financial resources, as well as adequate educational and administrative measures, especially to assure equal access to education together with quality education.

“Austria: Legally binding gender budgeting”

Since 2009, the Austrian constitution is one of the three countries which impose its government to adopt a gender-budgeting approach in their programs.⁹¹ The process has allowed an analysis on the gendered impacts of budgeting on both men and women and most importantly, allowed enhanced targeting and more efficient budget allocations⁹².

This gender-responsive measure would ensure equal distribution of rights for genders. For instance, Article 51 of the Austrian Constitution, paragraph 8 states:

“In the Budget Management of the Federation the fundamental principles of impact orientations, especially under consideration of the objectives of the effective equality of men and women, transparency, efficiency and the most faithfully possible representation of the financial situation of the Federation are to be observed.” As a result of this policy, gender equality within the education sector, if found deficient, would be carefully observed while setting the state budget management in the most fruitful manner possible.

91 Polzer, T., & Seiwald, J. (2021). Gender-responsive budgeting in Austria: The narrow line between implementation and confirmation. *Public Money & Management*, 41(7), 527–538. <https://doi.org/10.1080/09540962.2021.1927516>

92 Council of Europe (2008): Gender Budgeting - Practical Implementation. Handbook, CDEG (2008)15, www.coe.int/equality, “Gender Mainstreaming”.

A Dive into the Lebanese Context

The education sector in Lebanon has gone through multiple phases of improvement and downturns throughout its history. The political milestones in the country for the past one hundred years have left major implications on the sector.

In 1926, the Lebanese constitution ensured and protected the freedom of private and religiously affiliated educational institutions. With the expansion of these institutions and their increased influence, the private sector gradually attracted the majority of enrollment as compared to public schooling⁹³ and a major actor in the design of education curricula and policies.

Today, Lebanon's education builds on a two-tier system, the first encompassing public education run by the Lebanese government, and the second entailing private school institutions run by private organizations or, most commonly, religious, and faith-based organizations. It is worth noting that the latter caters to two-thirds of school students, unlike many trends around the globe⁹⁴. In fact, 71 percent of Lebanese children are enrolled in private schools.

The education sector has been affected by the various violence and turmoil that characterized Lebanon during the past four decades. Recently, the sector has been put under unprecedented stress due to the influx of Syrian refugees as of 2012⁹⁵, the economic crisis in October 2019, the outbreak of the COVID-19 pandemic, and the Beirut Port explosion on August 4th, 2020. All elements combined with political will gridlock, implementing structural and long-term reforms universal for all have been severely affected. Even though Lebanon has a long history of committing to international development agendas, its commitment to ensuring education as a fundamental human right and an enabler and equalizer of social justice has not been consistent.

The crisis is now at its peak with the exodus of students occurring from private to public schools. Student migration reached an unprecedented level during the academic year 2020-2021 when 36.5 percent of students enrolled in public schools as compared to 29.2% in the academic year 2011-2012 and the not-for-profit private school enrolment decreasing from 54% to 48.86% respectively⁹⁶. The same trends are expected to persist as the financial capabilities of Lebanese families keep on deteriorating; this migration is not related to a preference among families nor a choice but rather their inability to pay inflated or dollarized tuition in private institutions. The World Bank estimates that parents whose children are enrolled in private schools pay approximately USD 1.5 billion annually in Lebanon, compared to government spending of \$1.2 billion⁹⁷. However, it also estimates that around 54,000 students transitioned to public schooling throughout 2021 which adds an additional burden on the facilities of public education that were already struggling with its infrastructure, service delivery, and education quality. As the economy is expected to further contract the migration from private schools to public schools is expected to increase with increasing drop-out rates, especially among segregated communities⁹⁸.

93 Abdul-Hamid, H., & Yassine, M. (2020). A historical perspective on education in Lebanon. *Political Economy of Education in Lebanon: Research for Results Program*, 39–55. https://doi.org/10.1596/978-1-4648-1546-1_ch2

94 The World Bank & Ministry of Education and Higher Education. (2021). Schools, students, and teachers in Lebanon: Research for results program 2021. Retrieved from <https://openknowledge.worldbank.org/handle/10986/36794>.

95 Abdul-Hamid, H., & Yassine, M. (2020). A historical perspective on education in Lebanon. *Political Economy of Education in Lebanon: Research for Results Program*, 39–55. https://doi.org/10.1596/978-1-4648-1546-1_ch2

96 CRDP Statistics, 2020-2021 and 2011-2012.

97 The World Bank. (2021). *Lebanon economic monitor: Lebanon sinking (to the top 3)*. Retrieved from <https://openknowledge.worldbank.org/bitstream/handle/10986/35626/Lebanon-Economic-Monitor-Lebanon-Sinking-to-the-Top-3.pdf?sequence=1&isAllowed=y>

98 *Ibid.*

Public education in Lebanon has long faced structural problems in terms of efficiency of spending and equity in learning outcomes. In 2009, the National Documentation Center for Childhood warned against the risks and challenges the sector was facing. The first concerns limited political commitment to modernize education with no new legislation enacted since 2007. The second concerns unpredictable regressive education and financing policies with pockets of fragile service delivery in remote areas, and challenges related to the fragility in institutions and organizations driven by confessionalism, especially in remote areas⁹⁹. Until now, these remain unresolved challenges.

The education sector in Lebanon recently received one of the lowest rankings by the Programme for International Student Assessment (PISA) in terms of student learning outcomes. Furthermore, large disparities in learning outcomes were recorded across the country, with students enrolled in public schools and who belong to vulnerable households having poorer outcomes¹⁰⁰.

Financing the Education Sector

Like all other sectors, the education sector has been greatly impacted by the recent financial crisis. The financing of the sector involves funding public schools, subsidies to private not-for-profit schools, teacher salaries, and grants to non-profit organizations¹⁰¹.

The general directorate spends most of its budget on teacher salaries, in common with most countries. In 2017, it was estimated that the teacher wage bill accounted for 61 percent, 81.3 percent, 99.5 percent, and 28.2 percent of the respective budget of the directorates for general education, secondary education, higher education, and technical and vocational education over a three-year aggregate. Teachers' wage bills increased from 345 million USD to 533 million USD within three years only between 2011 and 2014¹⁰². This led to a low teacher-to-student ratio estimated at 1 to 12, which was much higher in secondary schools compared to elementary; compared in the academic year 2013-2014¹⁰³.

The reason behind these inflated wage bills and a low ratio is thought to be the confessional and nepotistic employment that often occurs without consideration of the skills and merit of teachers. In fact, in 2017, it was estimated that around 40 percent of public school teachers did not hold a university degree¹⁰⁴.

Another source of inefficiencies is the rent cost for public schools that are not state-owned. Overall, Lebanon has 1,232 public schools and 1,152 paid private schools¹⁰⁵. We are not sure about the number of schools that are leased or rented by the government, however, when the World Bank assessed the rental cost of school facilities between the academic year 2013-2015, the total share of rent costs reached 20 million USD over a three-year aggregate¹⁰⁶. However, it is also important to note that in the academic year 2021-2022, 39 schools have shut down because they are not able to cater to the needs of the students and teachers¹⁰⁷.

99 National Documentation Center for Childhood, 2009.

100 National Documentation Center for Childhood, 2009.

101 Abdul-Hamid, H., Sayed, H. I., Krayem, D., & Ghaleb, J. R. (2018). Lebanon Education Public Expenditure Review 2017. *The World Bank*. <https://doi.org/10.1596/30065>

102 *Ibid.*

103 *Ibid.*

104 *Ibid.*

105 CRDP Statistics, 2021-2022.

106 Abdul-Hamid, H., Sayed, H. I., Krayem, D., & Ghaleb, J. R. (2018). Lebanon Education Public Expenditure Review 2017. *The World Bank*. <https://doi.org/10.1596/30065>

107 CRDP Statistics, 2021-2022.

A final challenge related to the financing of the sector is the low budget allocated for enhancing school curricula and for learning innovations¹⁰⁸.

Weak public financial management in public schools has led to a deadlock in financing the infrastructure and maintenance of schools and the quality of education it provides. When a mass exodus was witnessed from private to public schools, the latter could not accommodate the needs of the large numbers that were seen shifting from one to another. Given that many public schools were not operating anymore as well, access to education was becoming more difficult for families that incurred losses with the devaluation of the Lebanese pound.

Summary Findings from Consultation Sessions

This chapter presents the preliminary findings from the consultation sessions conducted with stakeholders both males and females from different realms of influence. Consultation sessions were conducted with (1) independent members of parliament, (2) members from civil society working on gender equality, human rights issues, and human rights advocacy, (3) public servants and economic experts working on sustainable development and good governance, and (4) experts in the donor community and international organizations included and not limited to United Nations agencies. A limitation of this study includes the absence of minister participation in consultation sessions, whose contribution could have enriched the data and contextualized it within the Lebanese context.

Participants were asked to contribute to the study on multiple levels of analysis. Firstly, they were asked to reflect on the IMF recommendations for the Lebanese government and their opinion on the national recovery plan prepared by the Lebanese government. Second, participants were required to share their insights on the challenges that the education sector has been facing and the foreseen challenges it may further encounter if austere mechanisms were to be implemented in the sector. Third, consultation sessions covered the gendered impacts of austerity on Lebanese citizens, particularly women and girls, and especially within the education sector. Along these lines, participants were asked to provide their input on the future of girls' and other segregated groups and the challenges they expect to witness with the implementation of austerity policies. Finally, researchers asked participants to propose policy recommendations or suggestions of best practices to minimize the effects of austerity at a national and local level.

The primary data collected during the consultation sessions will inform the report and a policy brief, which will add to the literature on the topic. The data collected is being analyzed from an intersectional approach whereby each participant is contextualizing the topic from their field of expertise and experience.

Views on Historical Inefficiencies of the Education System

When asked to comment on their overall view the sector's historic evolution, interviewees noted that all levels of public education in Lebanon are in deep crisis, from primary education to higher education. Even secondary education, which was the path to getting out of poverty and upward social mobility has been diminished and negatively impacted. The Lebanese education system is seen as the nightmare of Lebanon; a sector that started very well at the beginning and then lost its credentials throughout history. After forty to fifty years of investment in the sector, public policies, or their lack not able to maintain the quality standards the sector was known for. Had it been well managed, this sector could have been the leader of the recovery.

❖ **The financing of the sector is perceived to privilege private institutions led by various sectarian groups and religious groups.** Confessionalism and political appointments diverted investment in the sector and are thought to have compromised the quality of education. Many question marks are raised as to the competencies and qualifications of teachers. An unpublished survey of economics teachers in public schools pointed out the skill gaps among this group and their abilities to deliver the related curriculum. Many did not possess any degree in economics or experience in teaching this subject matter.

❖ **Poor financial management seems to characterize the sector.** While donor funding was received to enhance the infrastructure of public schools, their information technology equipment, and rehabilitate the curriculum, the finances were mismanaged due to poor governance and were spent on unnecessary facilities such as building or renting schools that were not necessarily needed. The quality of higher education was severely damaged, to the extent that there is no longer a path to advancement without structural reforms that address the most deeply rooted corrupt transactions.

❖ **Inflated operational costs drain the sector's finances.** According to the interviewees, the teacher-student ratio is very low, as well as the number of students per public school. These factors are suspected to drive upward the operational cost in the education sector and command a thorough review. Many questions were raised as to the transparency of spending donor funds in support of the sector as well as their overall impact.

❖ **The quality of education has been compromised by incidences of corruption.** Secondary education on which Lebanon prided was also a victim of corruption schemes as many private institutions were licensed without being compliant with the required quality standards. Many universities and secondary schools have been caught selling and buying licenses and diplomas, which further harmed the reputation of the sector and its credibility. The quality of higher education was severely damaged, to the extent that there is no longer a path to advancement without structural reforms that address the most deeply rooted corrupt transactions.

❖ **Education is no longer the equalizer it used to be.** The sector was open to all social classes and was considered a pioneer in the region before the advancement of private school institutions that are religiously and politically affiliated and catered for privileged social classes. Quality education whether in primary, secondary, or higher education is more and more the realm of the privileged.

The consultations pointed out two severe challenges related to the current crisis: the first concerns the currency devaluation whereby neither tuition nor budget allocation suffices to cover the operating costs of schools. The second concerns the rapid erosion of the infrastructure of public schools that are operating double shifts to serve both the Lebanese and Syrian children with insufficient funding from the donor community to bridge the financing gap.

Views on Current Challenges of the Education Sector

The ability of the Ministry of Education and Higher Education to provide education has been severely eroded by serial crises. Ensuring necessary resources, retaining qualified personnel and teachers, and keeping schools open for the entire academic year are being impaired. Girls, women, and marginalized groups risk being stripped away from their right to education. As outlined earlier, these groups are more susceptible to being impacted as they were already at a disadvantage before the crisis. The below challenges illustrate the situation of the education sector as outlined by the participants.

❖ **The financial crisis has had an immense impact on service delivery.** Teachers' salaries have been severely degraded by spiraling inflation and the rise in the cost of living affecting their morale and their ability to attend their classes. The collapse of infrastructure services such as electricity, or the internet during hybrid studies impairs learning. In addition, the financial crisis is hindering the implementation of the 5-Year plan for the general education of the most marginalized communities in Lebanon.

❖ **The national response is perceived as weak, and transparency is an issue.** Political deadlock is preventing institutions, namely the government and parliament from regularly convening and progressing on the reforms front. Policies, laws, and regulations crucially needed to mend the effect of the crisis and to project Lebanon into a recovery phase are being stalled. An example of such deadlock is the voting of budgets and allocation of needed resources to priority sectors namely education. This situation is also affecting cooperation programs and agreements with international partners who are continuously solicited to fund the sector. Interviewees pointed to many reports related to transparency in managing donor funding for the sector and their effect on future funding. Furthermore, inter-ministerial coordination and financial planning are perceived as very weak or worse, absent.

❖ **Lebanon is not able to keep up with international commitments of education.** On September 19th, 2022, the New York Gathering at the UNGA called for transforming education in respective national contexts on a global level under 2030 Transforming Education Agenda. Due to the economic and financial crisis, Lebanon is not able to walk hand in hand with these global trends or at least, go at the same pace as other countries. This will impact any reform that ought to be taken within the education sector.

❖ **The outbreak of COVID-19 and distance learning excluded marginalized communities from education for two consecutive academic years.** The socio-economic challenges that some families faced did not allow them to ensure adequate technology for their children to pursue their learning during the pandemic. Attending to family needs such as health, care, and other most affected girls as they are mostly the providers of care work. The transition back into in-person learning should include considerations for gender equality and cater to the needs of students who were denied distance learning.

❖ **Transportation cost is becoming a major impediment to school attendance and is fueling dropout.** Many children are being denied their right to attend school because of problems with the availability and cost of transport. Many teenage girls are unable to reach schools because of long-distance commuting between school premises and their homes. Due to security reasons as well, their options are very limited which could potentially lead to dropouts. This particular impediment is not being properly addressed in the government's new policy measures related to school transportation.

❖ **The curriculum remains outdated and gender-blind.** Interviewees raised their concerns as to the absence of sexual and reproductive health education from the curricula inclusively for all classes and schoolbooks. Recently, the ministry of education and higher education launched in December a new national framework for school curricula that is expected to mend these deficiencies.

❖ **The crisis is severely impacting individuals with special needs and disabilities.** With the culmination of the financial crisis and the COVID-19 pandemic, children with disabilities are not receiving adequate healthcare and education services. Families with disabled children are not able to fund their enrollment and neither is the government, especially since most public school facilities are not designed to cater to the needs of physically disabled persons, the teaching methods are not inclusive, and teachers are not properly trained.

❖ **Despite mounting poverty, no long-term social protection strategy has been adopted by the national government yet.** The only measure implemented so far is cash transfers. The latter is thought to be both insufficient and inefficient. Cash transfers have been used with the refugee community in most UN programs. There, too, they have proven to be ineffective in improving the health and education of children. The government has no medium or long-term perspective and keeps on prioritizing safety nets instead of a universal coverage socially comprehensive plan.

Views on Gendered Impacts on Women and Girls

In times of severe difficulties, the weakest and most vulnerable are first to be affected and they are the hardest hit.

❖ **The burden of the crisis is falling on girls and women and impacting their educational attainment.** Even though historically girls outperform boys academically in Lebanon in terms of grades and enrollment, achievements are at risk of reversal as the country goes into a deeper economic fallout.

❖ **Gender-based violence and child marriage are known to increase when girls are not enrolled in school.** One of the biggest threats to girls out of school is child marriage and sexual abuse. In addition to child marriage, interviewees feared an increase in gender-based violence and child violence. As for girls who seek jobs to financially support their families, it is expected that they may be subject to sexual harassment and exploitation in the workplace.

❖ **The future of the education and healthcare sectors is in danger with the mass migration of teachers and healthcare frontliners.** The loss of competent human resources seeking better opportunities is impacting the quality and availability of health and education services. Furthermore, families' expenditure on health care has already shrunk, and consequently, reproductive, and sexual health is compromised as these services can be forsaken. Since women benefit the most from reproductive healthcare services, they are the first to be affected by the absence of competent healthcare workers and the increase in prices of these services.

❖ **Merging all-boys and all-girls schools may create a new stream of dropouts for girls.** Among austerity measures that the government may call for to reduce expenditures is the merging of some public schools. This may push some families to interrupt their girls' education because of cultural and religious norms that do not favor mixed schooling systems.

Policy Recommendations for Lebanon

As Lebanon seeks to find its way toward financial and social recovery with the support of the IMF, it is crucial that the design of the plan takes into consideration the adverse effect of austerity measures on the most vulnerable and include measures that maintain key social priority spending, in particular education.

❖ **Restructuring public finances while ensuring social safeguards is the first step to achieving national social justice.** For the past years, Lebanon's public budget resources have been drained by two sectors: the energy sector and the public sector wage bill, thus leaving little margin for capital and other spending including education and health. Restructuring public finances are necessary to generate fiscal space needed to increase expenditure on social sectors such as education and healthcare. The budget deficit should be addressed, and public finances put on a sustainable path so that the social sector would not fall victim to austerity measures and suffer further losses. Spending should be prioritized where the greatest impact can be achieved in alleviating poverty and preserving educational outcomes. Minimum floors on social and other priority spending should be included. Targeted reforms should be designed to protect poor and vulnerable groups, for instance by strengthening social safety nets and improving the tracking and monitoring of spending on such groups to ensure that gaps in equity of education can be accomplished without letting girls fall into the cracks of the crisis.

❖ **Reforms should prioritize budgeting processes and practices to ensure long-term commitment to education.** A shift from line-item budgeting to performance and gender budgeting is recommended as outputs of programs are tailored to the needs of the population or group targeted, which in this case encompasses girls and all segregated groups in Lebanon. Commitment to advancing girls' and women's should be reflected in the budgeting processes. Focusing on the education of girls as an instrumental pillar of the 5-YEAR General Education Plan collaborated between the Ministry of Education and Higher Education and UNESCO and including the plan within the IMF program creates a national responsibility on the Lebanese government to guarantee its implementation.

❖ **Financing of the education sector should be conditioned by a restructuring of its financial management, better targeting of budgetary resources, and strengthening of school-based management and funding systems.** This encompasses mapping the education system including main sub-sectors and stakeholders to ensure no financing parameters are omitted. It also entails defining financing needs and spending targets, assessing compliance with good financial management procedures, improving education financial data to provide useful insights into the overall patterns and efficiency of resource utilization, and examining the relative share of staff and non-staff related to cost, maintenance, and infrastructure needs. Assessing education sector financing against sector performance should guide resource allocation, especially to targeted groups namely women and girls. Setting performance indicators linked to funding contribute to maintaining the reform momentum focused on critical priorities. The education sector's performance should thus be measured both in terms of effectiveness and equity. A particularly important area of focus for strengthening the education financial management system is the establishment of reliable school-based management and funding systems and the capacity building of public accountants and financial managers. Reliable fund expenditure and tracking systems and sufficiently robust financial procedures are required to provide essential oversight. Audits systems and processes including internal control processes, internal audits, and external audits should also be strengthened.

❖ **Strengthen transparency and accountability frameworks so that funding is channeled to targeted groups, namely girls and women.** Transparency is directly connected with better accountability and better value for money. To ensure that resources are being invested efficiently and are meeting the needs of intended beneficiaries, it is imperative to put in place monitoring and transparency parameters by different stakeholders involved in the implementation i.e., local authorities, donor community, and civil society. One example is to make sure that spending is being tailored to the persons (girls, women, and marginalized groups) and the regions that need it most. UN Women developed “Women Empowerment Principles” that generated a Transparency and Accountability Framework for corporations.¹⁰⁹ Even though the recommendations are directed to inclusive businesses, we can learn from their key indicators to enhance measurement and reporting in projects directed to the education of girls in Lebanon to eventually support women’s economic empowerment and generate lessons learned across all program phases.

❖ **Infrastructure investment is essential if merging all-boys and all-girls schools were to happen to decrease the operational cost of the education sector and to accommodate for the needs of the most marginalized communities, primarily the refugee community benefiting from public school education.** Investment in public school infrastructure comes at the forefront of recommendations and must be conducted responsibly if single-sex schools were to be merged to decrease operational costs. In this sense, public school facilities must take into consideration the foreseen dropout rates among girls if such a merger were to happen. Investing in infrastructure can lead to larger school campuses that can be divided into different sections where girls in remote and conservative societies can still attend schools and learn without having their values or their families’ values compromised. In order to protect girls and their wellbeing, adopting gender-sensitive measures during merging procedures comes as an essential pillar of inclusiveness and equity. In addition, infrastructure development can serve the refugee community that benefits from the public schooling system in Lebanon without compromising the quality of facilities that are being used twice as fast and are currently neglected by government authorities.

❖ **Revamping the curriculum adopted in public schools and universities to bridge the inequality gap and include SRHR (Sexual and Reproductive Health and Rights) modules tailored to all levels of education.** This should go hand in hand with the continuous capacity building of teachers. At present, SRHR training is absent from schooling curricula, which poses the need to draft a curriculum that is tailored to the needs of each academic level of schooling from primary to higher education. Protecting the sexual health and welfare of teenage girls is a fundamental step toward accomplishing economic and social development. Noting that girls and women are mostly subject to sexual violence, gender-based violence, and abuse, raising awareness on the importance of SRHR, and including girls in these discussions is an important bridge to achieving human security and social justice; thus, attaining sustainable economic and social growth and vibrant societies¹¹⁰.

109 UN Women. WEPs Transparency and Accountability Framework Creating Transparency on Gender Equality to Transform Business. (2022). Retrieved from: <https://www.weps.org/resource/weps-transparency-and-accountability-framework>

110 United Nations. Education and reproductive health for girls key to sustainable development. (n.d.) Retrieved from: <https://www.un.org/youthenvoy/2016/03/education-reproductive-health-girls-key-sustainable-development/>

❖ **Cooperating with the national government, intersectional feminist civil society, and donor community to enhance accountability and transparency and guarantee that girls and those on the margins of exclusion and marginalization are primary beneficiaries of education programs.** Better governance of the education sector depends on continuous dialogue and cooperation with the main stakeholders concerned with the advancement of the sector, namely governments, civil society, and the international donor community. This dialogue should be continuous and reinforce the nationally set objectives and ensure a mutually reinforcing relationship. Cooperating with organizations concerned with intersectional feminism that targets all marginalized communities in Lebanon, on top of girls and women, and who have extensive experience in the education of girls and SRHR curriculum, and organizations and persons with experience in leading projects and programs in countering gender-based violence through the educational attainment of girls.

Transforming Education Summit 2022 – Action Track 15: Financing of Education



Action on budget shares: Any government allocating less than 15-20% of public expenditure or 4-6 % of GDP to education needs to develop a trajectory to achieve this key benchmark.

Action on tax: Many governments could increase tax-to-GDP ratios by five percentage points by 2030 through progressive tax reforms, enabling a doubling of spending on education, health, and more, but this needs to be matched with international action on global tax rules/havens. [...]

Action on Special Drawing Rights (SDRs): The IMF board could massively boost resources for education by issuing a new round of SDRs and agreeing on a mechanism for their redistribution.

Action on austerity: Governments should avoid austerity policies that block urgent spending on education, removing public sector wage constraints where there are teacher shortages.

Action on concessional loans and aid: The share of aid, climate funding and concessional finance earmarked for education should rise to 15-20% to match the domestic financing commitment.

Source of excerpt: UN Transforming Education Summit, Action Track 5: Financing of education, 2022.

Conclusion: Social Justice at the Heart of a Recovery Plan

Education is a fundamental human right that helps lift communities out of poverty, level out disparities, and guarantee long-term sustainable development.¹¹¹ It is a path to accessing other fundamental human rights and is recognized as the best long-term investment for the advancement of societies. The Universal Declaration of Human Rights and more recently Agenda 2030, namely SDG 4, 5, and 8 have already charted the way.

To achieve those targets, nations need to enact specific legal and policy changes and provide necessary budgetary resources while subjecting them to public scrutiny. Commitments need to be met by solid mechanisms and that accountability for violations is imposed¹¹².

The recovery plan must be built on inclusion, resilience, and transformation¹¹³. The plan should center on the principles of equity and intersectionality to cater to the needs of the most vulnerable groups, particularly women and girls. Spending on education in real per capita terms as a share of public spending should be maintained, and the efficiency of spending improved. In addition to the above, open access to data should be enhanced to increase public scrutiny, transparency, and accountability.

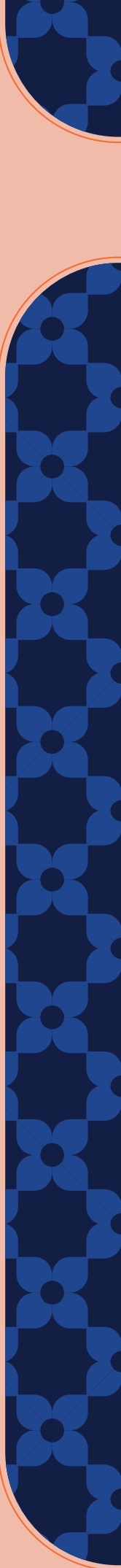
Girls' and women's education is the only guarantee for their upward social mobility, hence their emancipation. Promoting education as a social equalizer and enabler will contribute to reducing social inequalities and injustices.

111 UNESCO. *What you need to know about the right to education*. (2022, October 14). <https://www.unesco.org/en/education/right-education/need-know>

112 *Ibid.*

113 UNESCO. *Time to roll out education's recovery package*. (2022, October 18). <http://bit.ly/3J8IPuH>

Appendices



Appendix 1

Methodology

In Lebanon, data on the impact of austerity on women, girls, and all marginalized groups is scarce and does not expand beyond mere speculations based on the current numbers available related to the macroeconomic indicators. Even though learning from regional experiences can support us in presenting policy recommendations, the latter is evidence-based and requires data support.

In this vein, the methodology of this research report is two-tailed. It firstly builds on secondary data analysis through desk research and conducting comparative modeling between Lebanon and global and regional contexts such as Egypt, Tunisia, and Jordan. Even though the presented cases immensely differentiate from each other in terms of governance, timeline, and contextual environment, it is important to create a nexus between all various cases to demonstrate where failures have been common to prevent this experience from occurring in the Lebanese context. Moreover, Lebanon is entering a new phase of policy implementations and decisions that require the input of relevant stakeholders immersed in the fields of gender mainstreaming, economic advising, and policymaking.

In addition to desk research, the study builds on primary data collection through key informant semi-structured interviews with public officials from the Lebanese government, civil society organizations, local and international experts, and UN representatives. One of the additional aims of this study is to introduce an intersectional perspective into the research and bring about the voices of all concerned groups in Lebanon, especially the most vulnerable.

As for ethical considerations, the Asfari Institute for Civil Society and Citizenship upheld academic standards of research to safeguard the safety of all participants. Hence, the data collected were recorded on a password-protected computer on an AUB drive and were then transcribed and qualitatively coded into different themes. The data analysis helped formulate policy recommendations that will inform a policy brief.

A national conference will gather stakeholders from all different spheres including and not limited to the public sector, the nonprofit sector, international and donor community, and all those concerned and interested in attending.

The research paper will be discussed during the policy dialogue by sharing the findings and the policy recommendations through a presentation and opening the floor for plenary discussions between the various stakeholders.

Appendix 2

Interview Guide

Amid the restructuring plan negotiations between the Lebanese government and the IMF, the education sector falls victim to public major spending cuts to alleviate the budget deficit and ensure debt payment. In light of these developments, the Asfari Institute for Civil Society and Citizenship, the Malala Fund, and Issam Fares Institute for Public Policy and International Affairs have joined forces to analyze the gendered impacts of austerity measures on the education of women and girls in Lebanon.

The purpose of the project is to integrate a social justice and human security lens into the IMF and government reform plans and promote education as a social equalizer and an essential pillar to sustainable peace and economic development, enhancing security and reducing political, economic, and social inequalities and injustices.

Data on the impact of IMF restructuring and reform on social protection and education remains scarce in Lebanon and we only have regional experiences to learn from. However, there is a need for contextualized data relevant to Lebanon's atmosphere. Therefore, the Asfari Institute is hosting a series of consultation sessions with leaders and local/international experts in the field of education and gender and key informant interviews with public officials. The data collected informs the research report and should pave the way for a policy dialogue forum between all relevant stakeholders to push for policy recommendations on making the restructuring plan gender inclusive.

- ❖ Would you share with us your overall insights and perceptions on the IMF-sponsored reform package and the government of Lebanon's reform plan?
- ❖ The education sector seems overlooked by the national government's recovery plan. To what can you link this?
- ❖ How do you think the austerity or restructuring plan to be adopted by Lebanon will impact the already suffering education sector? And how do you think this affects Lebanon's overall social justice umbrella?
- ❖ How does the absence of inclusive policies in the education sector affect the education of women and girls in Lebanon and consequently, all other marginalized communities?
- ❖ In return, what are the expected repercussions on Lebanese women and girls amid education inaccessibility?
- ❖ How does the future of the education, healthcare and employment opportunities look like in Lebanon if sustainable social protection measures were not adopted?
- ❖ What are urgent policy recommendations to adopt to prevent the fallout of the education sector in Lebanon and maintain education as an enabler and equalizer of social justice?
- ❖ If you wish to add anything, kindly feel free to share it with us.

Appendix 3

A Humanitarian Approach from A Human Security Lens, Drawing on “Freedom from Fear”

The repercussions of austerity measures on public expenditure leave many groups, especially children and women, and pushes them further into poverty. This strips away their freedom from fear and want. These concepts are important to the human security approach that focuses on empowering individuals, providing them with equal opportunities, and enabling them to hold agency. Individuals strive to achieve freedom from fear caused by changes in the environment. They also seek to achieve freedom from ‘want’ which comes from being at a disadvantage and not being able to secure a stable living¹¹⁴. The right to be free aims to safeguard people from risks and hazards by ensuring human security. This concept necessitates the abolition of poverty, economic progress, the reduction of inequality, and the improvement of accommodations and housing, education, and healthcare.

Human security entails protecting people and their freedom because security is more recently regarded as the responsibility for one’s own life and the ability of people to care for themselves. Additionally, to achieve security and establish freedom from fear and want, social, political and economic structures need to preserve the benefits that individuals have gained through enhancing their opportunities and capabilities. The human security approach is founded on the recognition and protection of people’s rights as well as duties¹¹⁵.

Taking the approach of human security helps in constructing resilience to environmental shifts and disasters, elevating equitable and inclusive communities, and tackling the root causes of deprivation and poverty¹¹⁶. Thus, human security needs to follow an approach that is people-centered, preventative, inclusive, and comprehensive.

For a lot of women, freedom from fear and want is not an established reality of theirs as they live in economic instability which undermines their autonomy and agency. In addition, food insecurity is found at higher rates among women than men globally. However, the state of living in fear and want is also prominent among children who are also affected by economic violence. Economic violence is characterized partly by rendering or trying to render an individual economically dependent by exerting control over economic resources.

This can be done by not allowing an individual to have a financial account, not allowing them access to monetary resources, or prohibiting them from going to school or work. Women and children, especially girls, are heavily affected by this type of violence. These actions intensify the state of poverty the individual is in and impedes the chances to attain education or employment opportunities.

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116 UN. (2016). *Human security handbook: An integrated approach for the realization of the Sustainable Development Goals and the priority areas of the international community and the United Nations system*. Retrieved from <https://www.un.org/humansecurity/wp-content/uploads/2017/10/h2.pdf>



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