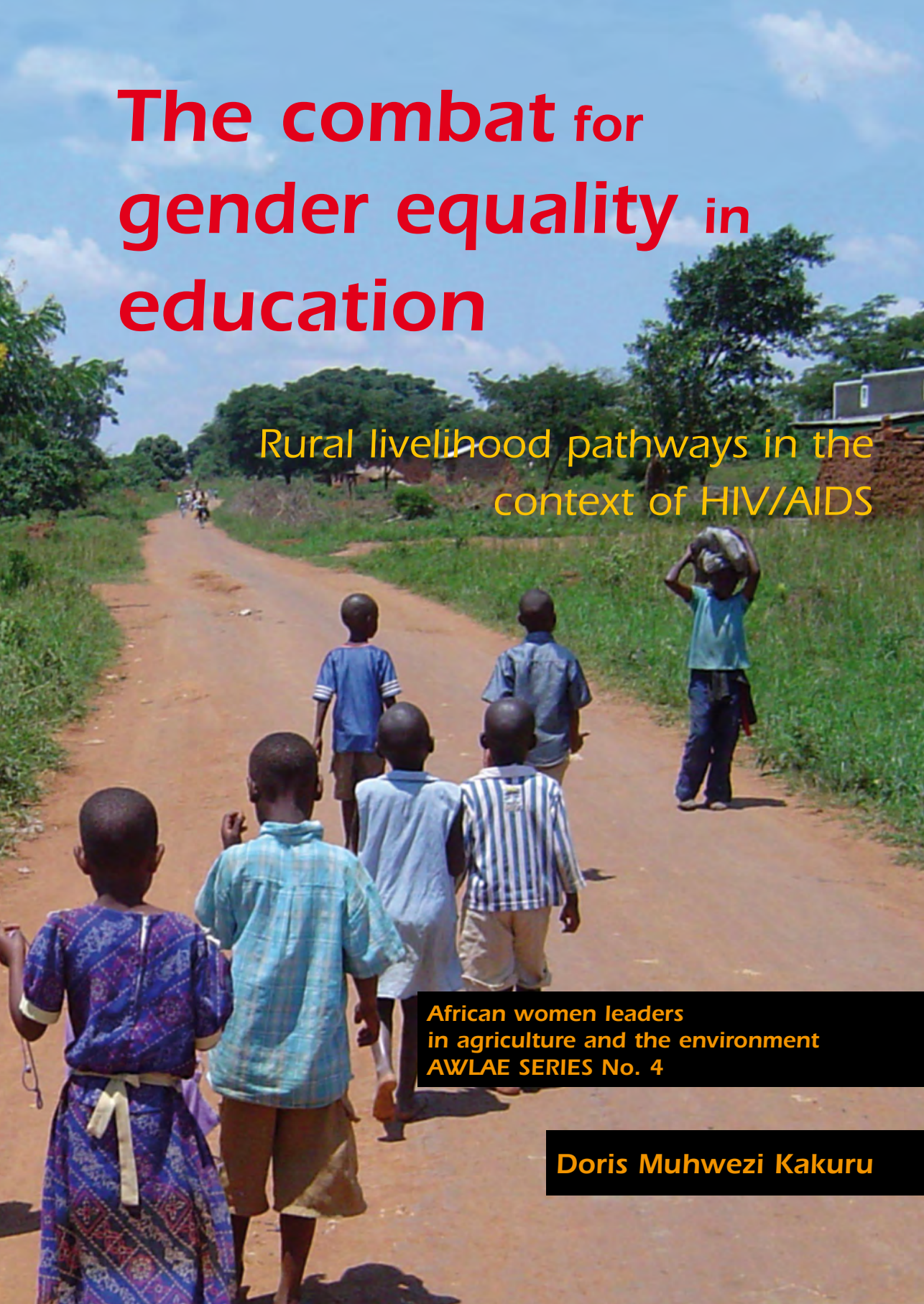
The combat for gender equality in education

Rural livelihood pathways in the context of HIV/AIDS



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Doris Muhwezi Kakuru

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Rural livelihood pathways in the context of HIV/AIDS

Doris Muhwezi Kakuru

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Doris Muhwezi Kakuru

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Preface

The aim of this book is to facilitate the recognition of HIV/AIDS impact on the livelihoods of rural households as an issue frustrating the combat for gender equality in Universal Primary Education. This is particularly so in patriarchal, poor, and rural contexts where children commute to school daily. In remote rural villages characterized by inadequate access to essential necessities of life such as food and clothing, insufficiency of necessary instructional materials among schools and poor teacher motivation, HIV/AIDS adds insult to injury. The AIDS-related livelihood pathways characteristic of such communities seem not to receive enough attention in the design and implementation of interventions and strategies to promote gender equality. I sincerely hope that this book will act as an eye-opener to all those involved in the combat for gender equality in primary education.

I carried out the study within the framework of AWLAE project (African Women Leaders in Agriculture and the Environment), managed by Winrock International, and funded by the Netherlands Ministry of Foreign Affairs (DGIS). I am most grateful to Johanna Spreeuwenberg without whom it would not have been possible to begin nor complete this research in the AWLAE framework. I am equally grateful to AWLAE management both in Wageningen and in Nairobi for the role they played in mobilizing and managing funds for my PhD scholarship and research grant. I am also deeply indebted to Makerere University for the supplementary financial assistance I received through the Staff Development Fund.

Many people supported me or contributed to this thesis directly or indirectly. Most of the time, such support was undeserved and it is therefore impossible to repay. This work concludes my student career which began with the support of my dear parents Jeroham and Felly Katobeerwa. I wish to convey special thanks to you for giving me an education that set the foundation upon which this work is rooted.

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Happitots pre-school and day care centre. Taking care of little Austin enabled me not only to undertake my fieldwork but also to write and complete this book. It would be unfair if I forgot the help from Joseline Nagaba, Silvia Nankya, and Musiime Provia.

Many thanks to all those who initiated me into Dutch life especially Riet Westeriengh. Lisa Price and Theo Ywema took up the challenge of teaching me how to ride a bicycle when I arrived in Wageningen to begin my PhD studies and I appreciate you. To my friends and first cohort AWLAE scholars Carolyne Nombo, Faith Nguthi, Gaynor Paradza, Hirut Bekele, Kidist Gebreselassie, Lydia Ndirangu, Monica Karuhanga, and Susane Akrofi, I will always treasure your kindness and support especially when I was expecting Austin. Other AWLAE colleagues – Aifa Ndoye, Binate Namizata, Corrie Du-preez, Daisy Onyige, Ekaete Udong, Fatima Dia, Joyce Challe, Mariame Maiga Regina Nchang, Rose Fagbemissi and Stephanie Duku -I enjoyed the experiences we shared at WU. Special thanks to Gaynor for your companionship, wisdom, and encouragement. From the moment we first met, I knew that we were destined to be great friends. Our stay at VanUvenweg is among the most memorable experiences of my doctoral studies. Carol, your company at Bornsesteeg and on 'SKYPE' made a whole lot of difference. Monica, I must say you are one of a kind. To Jan Luiten, I will always treasure the experiences of the Dutch primary school visits because of you. 'Pupils' of *Uganda primary school*-Prossy Isubikalu, Paul Kibwika, Diana Akullo, James Semuwemba, Fiona Mutekanga, Ruth Mubeezi, Richard Mugambe, Enoch Kikulwe, Fred Bagamba, Dickson Malunda, Wilber Aheebwa, I thank you for making this an unforgettable experience. My other friends - Charo Harrison, Marfo Emmanuel, Harriet Mutonyi and Kate Collins – I have to acknowledge your very useful comments on various drafts of my work. Tanja Weigel, I will always appreciate your support, companionship and the countless number of times you encouraged me to have faith in myself. My friends in Nalya KPC home cell N1B1A, many thanks for your support.

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ask for a more treasurable twin-sister than you. To Ricky, I appreciate the comfort you gave to my children in my absence. To my brothers, sisters, and in-laws, I thank you for the moral support you extended to my family and particularly for taking care of our parents. I thank my parents-in-law for supporting and respecting my decision to further my education. I wish to extend special thanks to the family of Mr. and Mrs Mugisha John for your contribution. To Aunt Anne, I have no proper words to express my appreciation. You left your own family to take care of little Austin when I was in Wageningen. Only a person with a special heart like yours could make such a huge sacrifice and I could never be able to thank you enough.

I appreciate the support of all my colleagues at the Department of Sociology-Makerere University whose names are too many to fit here. Many thanks to Jagwe-Wadda for teaching me how to use NUDST to analyse my data. I am equally grateful to Fred Bateganya, Dauda Waiswa, Innocent Kamya, Margaret Kyakuwa, Tumwine Christopher, James Wasike and Eria Olowo. Each of you took over my research or teaching duties at various times during my PhD studies and I will always remember that. Prof. Joy Kwesiga, your time and attention was undeserved.

My profound gratitude is due to my promoter Prof. dr. Martin Mulder for your contribution to this work. Martin, I thank you wholeheartedly for tolerating my ignorance on various issues addressed in this thesis. You introduced me to the world of competence studies to which I was completely ignorant and yet made me feel like I was worthy of being your student. I was extremely fortunate to benefit from your critical and valuable comments, which shaped and reshaped the ideas and knowledge presented in this work. The fact that you always gave me undeserved attention is not to be taken for granted. To Arjen Wals, many angles of your thinking shaped the various chapters of this book. I learnt a lot from your useful comments and discussions about this work. I am sure that without you, this book would have turned out different. Margreet vander Burg, I learnt so much from your gender expertise. Your visit to my field sites and the ensuing stimulating discussions provided a lot of food for thought. Your constant questions and criticism encouraged me to keep thinking and of course improving.

Although this project has ended, my request is that may you never stop questioning me.

I lack the proper words to express my gratitude to my dear husband Derek Muhwezi. I sincerely thank Derek not so much for demonstrating impeccable understanding as for taking over my motherly responsibilities for such a long time. Knowing that I could depend on you to take care of our precious boys made some extremely difficult decisions much easier. In addition, I owe you a debt of gratitude for proofreading the various drafts of this book. I could never have asked for more support, patience, and encouragement. To my beloved sons Daniel, Brian, and Austin, I thank God for the blessing that you are in my life. My absence from you was the driving-force behind all the energy put into this work. I feel proud and honoured to declare that thinking of you made me sit up, reason, and write even at times when I should have been too tired to do so. I am deeply grateful to you for just being there.

Last but most important, I THANK GOD. "*For Unless the Lord builds a house, they labour in vain who build it…*" (Ps. 127:1).

List of acronyms

CEDAW	Convention on the Elimination of all forms of Discrimination Against Women
CRC	Convention on the Rights of the Child
DFID	Department For International Development
EIC	Equity in the Classroom
ESSIP	Education Sector Strategic Investment Plan
GAD	Gender and Development
GDI	Gender Development Index
GEEI	Gender Equality in Education Index
GOU	Government of Uganda
HDI	Human Development Index
IMF	International Monetary Fund
MGLSD	Ministry of Gender, Labour and Social Development
MoES	Ministry of Education and Sports
MOH	Ministry of Health
PIASCY	Presidential Initiative on AIDS Strategy Communication to the Youth
PLE	Primary Leaving Examination
PLHA	Persons Living with HIV/AIDS
PTA	Parents and Teachers' Association
PTE	Primary Teacher Education
SAP	Structural Adjustment Programme
SBL	Stichting Beroepskwaliteit Leraren en ander onderwijs-personeel (Association for the Professional Quality of teachers)
SFG	School Facilities Grant
SWAP	Sector Wide Approaches
TDMP	Teacher Development and Management Plan
UAC	Uganda AIDS Commission
UBOS	Uganda Bureau of Statistics
UNAIDS	The Joint United Nations Programme on HIV/AIDS
UNCDC	Uganda National Curriculum and Development Centre
UNDP	United Nations Development Program
UNESCO	United Nations Educational Scientific and Cultural Organisation
UNHCHR	United Nations High Commission for Human Rights

UNICEF	United Nations Children's Fund
UPE	Universal Primary Education
WCFEA	World Conference on Education for All
WHO	World Health Organisation
WID	Women in Development
WVI	World Vision International

Chapter 1
General introduction

1.1. Introduction

This thesis is a search for new approaches to educational gender equality. It looks at complex interactions between school and household processes and the role of HIV/AIDS not only in reinforcing the old structural constraints but also creation of new ones. It sheds light on how poor people's responses to livelihood stress shape actual school processes and vice versa including the challenges to achievement of gender equality. Among the numerous challenges, HIV/AIDS is a major factor. Central to this thesis is the assumption that various contours of wider social inequalities and dynamics – including HIV/AIDS – shape the nature of educational inequalities. In addition, social patterns influence individuals' pathways of dealing with the impact of HIV/AIDS on their livelihoods. These pathways are based on the various identities and statuses of individuals in the social structure. In other words, the experiences and structural expectations of parents or guardians, teachers, and pupils as individuals living in poor communities influence their actions and pathways. Moreover, these experiences and structural expectations are often incongruent with the general notion of equality.

This research can be seen as an in-depth project following my participation in a study about the contradictions in UPE, that was commissioned by Actionaid International-Uganda and executed by the Centre for Basic Research, Kampala in 2001. Later, I got involved in the implementation of the District Response Initiative (DRI) on HIV/AIDS action research, which aimed at documenting HIV/AIDS best practices in Uganda. My field experiences in both projects motivated me to better understand the issues addressed in this thesis. Before addressing these issues, I will give a brief background of UPE in Uganda. More details about Uganda, the education system, and HIV/AIDS situation are elaborated in annexes I-V.

1.2. Universal Primary Education

African governments have been grappling with the issue of achieving gender equality to education for several decades. UPE is one of the measures put in place to fight gender inequalities in education. During the 1980s, the trends of primary school enrolments and quality of education were declining due to the negative effects of the International Monetary Fund (IMF) Structural Adjustment Programmes (SAPs). The effects of the SAPs led to the commissioning of various studies by different development agencies. These studies spearheaded the first UNDP Human Development Index (HDI) that encompassed numerous indicators of human welfare including health and education (Webster, 2000). The UNDP HDI inspired the 1990 World Conference on Education for All (WCEFA) in Jomtien where the goal of UPE was later stipulated under chapter 5 of the declaration as "broadening the means and scope of basic education" (WCEFA, 1990: 159-160).

UPE in Uganda was launched in 1997 following the recommendations of the 1989 Education Policy Review Commission, and the subsequent relevant stipulations of the Government of Uganda White Paper on education (GoU, 1992). The implementation of UPE led to the abolition of tuition fees and Parents and Teachers' Association (PTA) charges. However, parents are still required to provide materials such as exercise books, pens, pencils, and clothing. Nevertheless, the government of Uganda has demonstrated commitment to UPE through increasing financing to the education sector. The Education Sector Strategic Investment Plan (ESSIP) makes it mandatory that at least 65% of the education budget is spent on primary education as a key poverty reduction priority area (Bategeka & Okurut, 2006). The policy objectives of providing UPE are*: i)* establishing, providing and maintaining quality education as the basis for promoting the necessary human resource development, *ii)* transforming the society in a fundamental and positive way, *iii)* providing the minimum necessary facilities and resources to enable every child to enter and remain in school until the primary cycle of education is complete, *iv)* making education equitable in order to eliminate disparities and inequalities, *v)* ensuring that education is affordable by the majority of Ugandans, *vi)* by achieving UPE, government would be fulfilling its mission of eradicating illiteracy while equipping every individual with the basic

skills and knowledge with which to exploit the environment for both social and national development.

Due to UPE, primary school enrolment in Uganda has increased from three million in 1996 to 5.3 million in 1997, and 7.0 million in 2004 (MoES, 2004). Through the School Facilities Grant (SFG), the Ministry of Education and Sports (MoES) has so far managed to increase classrooms from 25,676 in 1996 to a current 78,403 (Bitamazire, 2005). In addition, the number of teachers has increased from 81,564 in 1996 to 125,883 in 2004 (MoES, 2004). However, the dropout rate is still appallingly high. It is estimated that out of the 2,159,850 pupils who enrolled in primary one in 1997 when UPE was launched, only 23% (485,703) reached primary seven in 2003 (Bategeka & Okurut, 2006). In addition, the quality of education still needs significant improvement. Despite improvements in quality indicators like the pupil-teacher ratio (currently at 50:1), the pupil-classroom ratio (84:1) and the pupil-textbook ratio (3:1), the task ahead remains considerable.

The government has also demonstrated commendable efforts towards achievement of gender equality in all aspects of life including education. Uganda, has for example, made significant progress regarding the 2005 gender parity goal in primary education, with 49.3% of total primary school enrolment being female (Kwesiga, 2003). Uganda's GEEI (Gender Equality in Education Index)[1] has increased from 24% in 1993 to 54% in 2003 (Unterhalter *et al.*, 2005). This success is attributable to a number of measures specifically instituted to eliminate gender disparities and inequalities (see Annex VII). The above improvements and interventions notwithstanding, past research has demonstrated that gender inequalities in UPE have persisted (see Amanda & Amanda, 2000; Kakuru, 2003; Kasente, 2003; Okuni, 2003; Kwesiga, 2003; Shabaya & Konadu-Agyemang, 2004). Most of these previous studies focussed on inequalities in the school setting but hardly explored the magnitude of the complex interactions between school and household processes. This research sought to clearly understand

[1] The GEEI was compiled using UNICEF data on girls' school attendance, UNESCO data on girls' primary school achievement and the UNDP Gender Development Index (GDI). It is a measure of girls' school attendance and their capability to transform this to transition to secondary education and future outcomes (See Unterhalter et al., 2005: 67).

the reasons for the persistence of gender inequalities in UPE regardless of the deliberate interventions to eradicate them. Therefore, a more comprehensive and balanced perspective based on in-depth research was developed that acknowledges the particular ways in which rural school and community processes interact.

1.3. Rural school and community interaction: Bringing HIV/AIDS on board

In order to understand the interface between school and community processes, it is important to first review secondary data. HIV/AIDS is generally acknowledged as a major challenge to the achievement of Millennium Development Goals (MDGs) (Whiteside, 2003). By December 2002, the total number of people living with HIV/AIDS worldwide had reached 42 million, 69% (29.4 million) of whom lived in sub-Saharan Africa (UNAIDS, 2004). The corresponding figure for 2005 is 40.3 million in the world, and 64% (25.8 million) in sub-Saharan Africa (UNAIDS/WHO, 2005a; 2005b; 2006a). HIV/AIDS has exacerbated the growth of poverty in the affected countries (Barnett & Blaikie, 1992; Haddad & Gillespie, 2001; Barnett & Whiteside, 2002; Baylies, 2002; Cohen, 2002; Whiteside, 2003; Whiteside *et al.*, 2003). In addition, it has reduced household labour and agricultural production through prolonged illness, debility, and mortality (Rugalema, 1999; White & Robinson, 2000; Barnett & Whiteside, 2002; Baylies, 2002). An estimated 12 million children under 17 years in sub-Saharan Africa have lost one or both parents to AIDS (UNAIDS/WHO, 2006). In Uganda, almost half (940,000) of the 2 million orphans by the end of 2003 were due to HIV/AIDS (UNAIDS, 2004). In fact, orphans constitute 17% of primary-school-going children (MoES, 2004), and by 2001, 25% of Uganda households hosted an orphan (Deininger *et al.*, 2003). HIV/AIDS broadens the existing gender inequalities (Ellis, 2000; Muller, 2004), which implies that women are more vulnerable to infection than men are (Smith, 2002), because of biological and social reasons. Women constitute 59% of all Africans living with HIV/AIDS (UNAIDS/WHO, 2006b), and more than 50% of adult Ugandans living with HIV/AIDS (UNAIDS, 2004). Although figures do not show much difference in terms of affliction by gender, women considerably incur more social costs of the disease than men do in many areas of sub-Saharan Africa where asymmetrical power relations exist (Muller,

2004). For the rural poor who depend on subsistence farming, females' affliction extends to the constraints on the successful execution of productive and reproductive roles. The projected number of people living with HIV/AIDS in sub-Saharan Africa has been rising since the onset of the epidemic (see Figure A.4). HIV/AIDS affects all sectors of nations' economies and all facets of human life. According to Haddad & Gillespie (2001), the impact is so huge that every person on earth is considered to be living with AIDS in some way. Although about 72% of all people in need of Antiretroviral Therapy (ART) live in sub-Saharan Africa, only one sixth of these accessed treatment in 2005 (UNAIDS/WHO, 2006b). The resources to provide ART for all people living with HIV are still limited. Other commonly cited barriers to ART adherence[2] which are at work in developing countries like Uganda are structural factors (*e.g.* poverty, drug stock-outs, and stigma), medication characteristics (*e.g.* taste, size and side effects) and dosing characteristics (*e.g.* large pill burden, and length of treatment) (Bikaako-Kajura *et al.*, 2006). Despite the expansion of ART, it may not necessarily achieve and maintain full therapeutic benefits in light of the barriers to high adherence, which implies that the socio-economic impact of HIV/AIDS persists.

The impact of HIV/AIDS on the education sector has been well documented (*e.g.* Kelly, 2000a; Bennell *et al.*, 2002; Evans, 2002; Loevinsohn & Gillespie, 2003; World Bank, 2002a; Boler, 2003; Amone & Bukuluki, 2004a; 2004b; Cohen, 2004; Delamonica *et al.*, 2004; Kelly, 2004; Rugalema & Khanye, 2004; Bennell, 2005; Caillods, 2005). Some of these studies addressed demographic effects for example how increased child mortality could reduce the projected enrolment figures (Aspaas, 1999; Bennell *et al.*, 2002; Loevinsohn & Gillespie, 2003; World Bank, 2002a; Bennell, 2005). The impact on teachers has been analysed in studies focussing on levels of in-service mortality and HIV prevalence using school-based surveys and qualitative data (*e.g.* Bennell, 2005; Boler, 2003). Studies by Amone & Bukuluki (2004a; 2004b) looked at the effect of HIV/AIDS on issues of policy, leadership advocacy responses, and governance in the education sector. However,

[2] ART Adherence has been described as the practice of taking antiretroviral regimens in the correct doses at the right time and in the right way (Hardon *et al.*, 2006).

analysis of the exact ways in which household responses to the impact of HIV/AIDS translate into gender inequalities based on in-depth research is inadequate. This thesis is a step in that direction. Figure 1.1 shows the major relationships between HIV/AIDS, education and rural livelihoods. Relationships 1, 2, and 3 concern the negative impact of HIV/AIDS on rural livelihoods and gender inequalities in UPE. These relationships are the major concerns of this study. Relationships 4 and 5 represent the potential of education to improve the situation of both HIV/AIDS and rural livelihood, which could then yield positive interaction represented by 6.

1.4. Research question

The key question addressed in this study is: To what extent is the persistence of gender inequalities in Universal Primary Education attributable to the interface between HIV/AIDS and rural livelihoods?

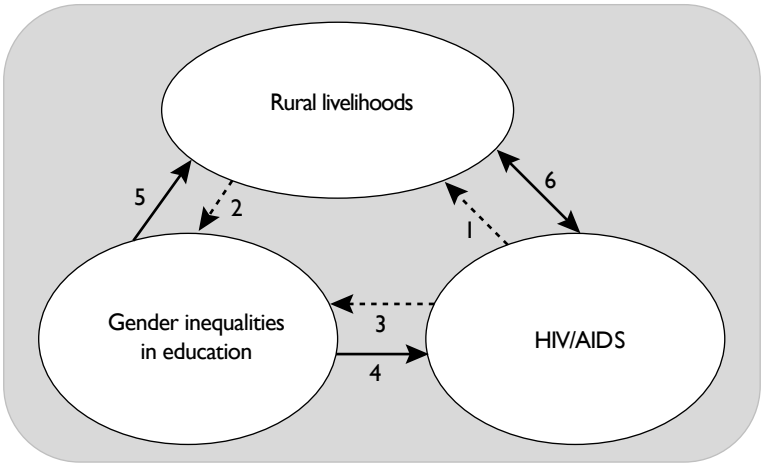

Figure 1.1. Interrelationship between livelihoods, HIV/AIDS and Gender inequalities in UPE.

1.5. Research objectives

The main objective of the research was to establish why gender inequalities in UPE persist despite deliberate efforts to eradicate them. The study was guided by the following specific objectives:

1. To establish how the effect of HIV/AIDS on rural household livelihoods conflicts with investment in girls' education.
2. To find out the effect of household responses to the impact of HIV/AIDS on teacher competence to promote gender equality.
3. To identify other school-related factors that hinder gender equality in the context of HIV/AIDS.
4. To propose a framework for understanding the persistence of gender inequalities in UPE.

1.6. Theoretical assumptions

In this section, I explain the theoretical assumptions underlying the analysis undertaken in this thesis. First, gender equality or the provision of equal capabilities is understood as a result of an intersection between various aspects of the social structure or the social organisation within which schools are situated. Secondly, individuals' capabilities arise from their pathways in view of livelihood situations and structural boundaries. This thesis draws on Sen and Nussbaum's capabilities' approach and the United Kingdom (UK) Department for International Development (DFID) Sustainable livelihoods framework. I view the promotion of gender equality in UPE in the context of HIV/AIDS through the lens of increasing capabilities of the affected children by mitigating the impact of HIV/AIDS on their livelihoods including those of their parents and teachers. I argue that since school processes are shaped by social dynamics, the benefits of enhancing capabilities and mitigating HIV/AIDS will eventually be visible in the education sector. Teachers' competences to promote gender equality will improve due to changes in their professional knowledge landscapes. Gender equality in pupils' academic competences will in effect improve because some significant obstacles are out of the way. In the next section, I elaborate on the significance of the capabilities approach and the sustainable livelihoods framework to educational processes.

1.6.1. Gender equality: The capabilities approach

Gender refers to the socially constructed differences between males and females (Moore, 1988; Alexander & Baden, 2000). This social construction reflects inequalities in power, decision-making, control over events, freedom of action, ownership of resources, and so on (Ellis, 2000). This perception of gender shows that it is essentially about power and subordination. In Uganda, the gender relations at the household level are maintained through a set of institutional and cultural practices. Household members are required to act and behave according to obligations and expectations from others or based on societal values. This orientation extends to social encounters[3] outside the household. For example, relations between teachers and pupils or parents and pupils are influenced by gendered social values, practices, and beliefs. Agarwal (2004) points out that gender inequalities stem from several factors. For example, differences in economic endowments and social norms that perpetuate subordination form a foundation upon which new types of inequality build.

In this thesis, I highlight the influence of social norms regarding gender on pedagogical processes including teacher-pupil and pupil-pupil relations in and outside the classroom. There are various approaches to gender equality in education as outlined by Unterhalter (2005a). The WID (Women in Development) framework perceives equality in terms of resources – also sometimes called parity. The GAD (Gender and Development) puts emphasis on the redistribution of power – sometimes termed equity. Post-structuralism emphasises the variations in perceptions of gender according to context. It focuses more on individual and local experiences rather than the universal ones. The Capabilities approach is an interpretation of gender equality in terms of respect for human rights. It emphasises equality of rights and capabilities. It perceives development as freedom and education as a basic capability (Unterhalter, 2005a).

[3] A social encounter is an arrangement that occurs when people are in one another's immediate presence. During these encounters, individuals manage the impressions they give and images they portray. According to Goffman, human social behaviour is managed in the same way theatre performances are managed on a stage (Goffman, 1959, 1961, 1967).

The capabilities approach was coined by Sen (1980, 1992, 1999) and Nussbaum (2000). Capabilities are valuable beings and doings achievable with a person's social and personal characteristics (Sen, 1980; Dreze & Sen, 1989; Nussbaum, 2000; Saito, 2003). Nussbaum (2000) articulates a threshold level of capabilities as a basis for constitutional principles that citizens have a right to demand from their governments. She provides a universal list of central human capabilities to be achieved in order to attain an acceptable level of capability for all. Nussbaum (2003) links capabilities to human rights. Within the capabilities approach, gender inequality reflects capability deprivation (Unterhalter, 2003, 2004, 2005b) and hence human rights infringement (Saito, 2003). Aspects of such equality for example include entitlements to school attendance, participation, safety, security, and meaningful educational outcomes (Aikman & Unterhalter, 2005). Gender equality, therefore implies equality of capabilities of children to enjoy educational rights and entitlements. It encompasses their equal access to an education that enables them to surpass the threshold level of capabilities stipulated by Nussbaum (2000). Gender parity on the other hand is a quantitative measure that counts numbers of girls compared with those of boys enrolled in school (Aikman & Unterhalter, 2005). Parity in enrolment does not necessarily imply that children have equal access to opportunities and treatment. It does not guarantee that they will attend school or even complete the particular cycle (McGee, 2000). I argue that gender differences in capability deprivation are connected to issues in livelihood relationships and sustainability. Capability deprivation emanates from unequal access to resources, activities, or both (Ellis, 2000). Access to key assets and activities is gained through resource allocation and decision-making processes, which can be explained appropriately using the sustainable livelihoods framework.

In this research, the capabilities approach was favoured over others because of its more encompassing view of gender. In this approach, achievement of gender equality is not only realised through counting the numbers of girls versus boys. It is a multi-faceted process of manipulating the structural mechanisms through which people acquire and conform to subjective gender identities. This is attainable by means of intensifying the struggle for equality of rights and capabilities particularly through improved resource allocation and decision-making processes.

1.6.2. The livelihoods framework

The livelihoods framework is a tool to help understand the livelihoods of the poor (DFID, 2001). There are various livelihoods approaches to poverty (Carney *et al.*, 1999). These include the approaches of international organisations, namely: CARE, OXFAM, UNDP, and DFID. The approach of CARE puts emphasis on human capabilities, access to tangible and intangible assets, and existence of economic activities. The interaction between these attributes forms the components of livelihood strategies pursued by a household. CARE's emphasis is on the household livelihood strategies. The approach of OXFAM emphasises the need for various perspectives on sustainability. These include economic (functioning of markets and credit supply), social (networks and gender equity), institutional (capacity building, access to services, technology and freedom), and ecological (quality and availability of environmental resources). UNDP stresses the relationship between poverty, governance, and environment. The UNDP approach also emphasises people's strengths as opposed to needs, support to micro-links and activities, constant assessment, and support of sustainability. A key focus is on adaptive strategies. The DFID approach is underpinned by the commitment to poverty eradication and has six underlying principles. According to this approach, development should be people-centred, responsive and participatory, multilevel, conducted in partnership, sustainable and dynamic.

The livelihoods framework is generally people-centred, holistic and focussed on the multidimensionality of daily life (Kaag *et al.*, 2004). It presents the main factors that affect the livelihoods of the poor and the relationships between them. A livelihood concerns the way people shape their lives using material and non-material assets (Kaag *et al.*, 2004). It includes the results of the activities undertaken by people in the process of procuring their basic needs. The most popular definition was given by Chambers & Conway (1992: 6).

> *"A livelihood comprises the capabilities, assets (stores, resources, claims and access) and activities required for a means of living: a livelihood is sustainable if it can cope with and recover from stress and shocks, maintain or enhance its capabilities and assets, and provide sustainable livelihood*

opportunities for the next generation; and which contributes net benefits to other livelihoods at the local and global levels and in the short and long run."

The poor pursue a range of livelihood outcomes and activities, which are influenced by their access to assets. Access to assets is therefore an important determinant of the quality of life poor people or households lead, and the kinds of paths they pursue out of poverty. Their livelihood activities are determined by their own preferences and priorities as well as the vulnerability context (Farrington *et al.*, 1999). Poor people operate in a vulnerability context (the external environment in which they exist), with access to assets which gain meaning and value through the prevailing social, institutional and organisational environment (DFID, 2001).

The livelihoods framework has five asset dimensions, namely: Human capital, social capital, financial capital, natural capital, and physical capital. Human capital includes labour, skills, knowledge, good health, and other aspects such as experience and inventiveness (De Haan, 2000). Social capital incorporates all the social resources that people (both men and women) draw upon in pursuit of their livelihoods. These include social networks such as patron-client relations, mutual reciprocity, and group cohesion. Natural capital comprises resources such as land, water, vegetation, and mineral endowments. Physical capital includes basic infrastructure and producer goods upon which the poor draw to meet their basic needs and to function productively. These include food, livestock, equipment, machinery, and tools. Financial capital refers to monetary resources that people use to achieve their livelihood objectives. According to DFID (2001), access (ownership of or right to use) to a single asset can generate multiple benefits. This implies that a single asset (*e.g.* land) can be used to generate another (*e.g.* money). On the other hand, trends, shocks, and seasonality of the vulnerability context are capable of destroying the assets but can also provoke new and valuable developments such as technological innovations.

People's livelihoods and asset availability are shaped by shocks and stresses. Shocks are infrequent, unpredictable, and have immediate large-scale impact. Stresses are smaller, more regular, predictable and

less violent (Scoones, 1998). An individual or group's livelihood is sustainable if it can adequately satisfy self-defined basic needs and be secure against shocks and stresses (De Haan, 2000). Although the natural environment is normally emphasised, the socio-economic environment is important as well. This is where issues related to the impact of HIV/AIDS on household livelihoods come to the fore. The household is a social unit most appropriate for investigating livelihoods (Ellis, 2000) and therefore deserves special elucidation.

1.6.2.1. Conceptualisation of 'a' rural household livelihood

The term 'household' is difficult to define because its meaning rather overlaps with that of others like 'the family' and 'the domestic sphere' (Moore, 1988). However, a 'household' is a term usually used to refer to "the basic unit of society involved in production, reproduction, consumption, and socialisation" (*ibid.*: 54). A household therefore shares a residence and meals, and makes coordinated decisions, resource allocation, and income pooling (Meillassoux, 1981; Ellis, 2000). This is different from the family – a social unit based on kinship, marriage, and parenthood (Moser, 1993; Ellis, 2000). However, although kinship is the key attribute of a family, and so is co-residence for a household, the two concepts remain naturally and universally synonymous (Moser, 1993). In other words, they cannot be strictly separated. For example, cases of non-resident family members being part of a household or extended family members permanently in residence are common in many areas. The existence of various types of living arrangements as highlighted by (Young, 1992) underlines the contentiousness of co-residence as a key attribute of a household. However, despite the fluidity of the concept of 'household', its importance as a unit of analysis is well acknowledged (*e.g.* Agarwal, 1997; Kabeer, 1994, 1998).

In this study, the household is an important unit of analysis through which subsistence farmers' livelihoods are secured. A subsistence farming household is that which derives a major proportion of its livelihood from cultivation of food crops and rearing of animals mainly for home consumption. This type of household allocates more time and resources to the cultivation of food crops than animal rearing. The key assets of such a household include land, water, livestock, people's own labour, their knowledge, and ownership of productive tools.

Subsistence farming households characterise communities whose main preoccupation is reproduction whereby, all institutions are organised to fulfil this purpose (Meillassoux, 1981). The implication is that the availability of schooling as a task/activity is a kind of modification in such societies. Females are extremely important to the survival of such a society and their education is bound to be constrained by the social organisation. Such constraints are traceable in the process of household decision-making and resource allocation.

1.6.2.2. Household decision-making, livelihood strategies, and pathways

Economists have for a long time perceived the household as a single decision-making unit under an altruistic head. These 'unitary models' of the household assume aggregation of decision-making, resources, and individual utilities of the different members into a joint welfare function (Ssali, 2003). This perspective ignores power relations within the household and the role of individual decision-making and choices (Gardiner, 1997). Women's decision-making is subsumed under the household as if the household is an individual with its own logic and interests (Wolf, 1997).

The recognition of the challenges of the personification of the household led to the development of non-unified (collective) models. These emphasise the importance of bargaining in the process of household decision-making. That is, individuals with stronger fallback positions are in a better bargaining position in terms of pressing their own preferences. (Agarwal, 1997; Kabeer, 1998; Quisumbing & Maluccio, 1999). Gender differences in access to strong fallback positions in patrilocal and virilocal societies such as Uganda imply that males manipulate household decision-making according to their preferences. This is because the *doxa*[4] (Bourdieu, 1990) are controlled by the dominant members of the 'field'[5] (Kandiyoti, 1998). In the

[4] Doxa means a society's taken-for-granted, non-questioned, and generally 'allowed' behaviour and opinions (Bourdieu, 1990).

[5] The concept of field is used by Bordieu to mean a social arena in which individuals' struggle for desirable resources. It is a system of social positions structured on the basis of power (Bourdieu & Wacquant, 1992).

context of HIV/AIDS where individuals must make decisions to cope with the impact, females' preferences remain in the periphery.

In order to obtain a livelihood, people undertake various kinds of activities, that can be labelled a *livelihood portfolio* (Niehof & Price, 2001). People undertake these activities based on strategies devised to achieve their goals, hence the concept *livelihood strategies*. Livelihood strategies are the repertoire of conscious and coherently structured activities and decisions, which people undertake and make in the process of achieving their livelihood goals (Anderson *et al.*, 1994; Niehof, 2004). Mechanisms that people devise to counteract shocks and stresses in the short run are called coping strategies. People's coping strategies later translate into normal livelihood strategies when shocks and stresses eventually fade away (De Haan, 2000). This implies that livelihood strategies vary across time and space depending on the trends, shocks and seasonality of the vulnerability context (DFID, 2001). This livelihood perspective portrays people as victims of structural constraints (Kaag *et al.*, 2004). There is a narrow focus on people's actions and strategies at the expense of the role of structural processes such as power inequalities and the diversity of human categories (Nooteboom, 2003). The assumption that poor people are able to strategise and counteract local problems, anyway, downplays the importance of structural constraints. It seems to imply that actors aim at attaining pre-determined livelihood goals based on their preferences. However, decision-making among the poor does not necessarily draw upon visions projected on the future (De Haan, 2000). In dealing with risk, people make decisions based on their recollections of the past in view of the current concerns. The concept of *pathways* addresses this very well. A pathway is "an iterative process in which a step-by-step procedure, goals, preferences, resources and means are constantly reassessed in view of new (unstable) conditions with which the decision maker is confronted" (De Bruijn & van Dijk, 2005: 7). For example, in the era of HIV/AIDS impact, parents' decisions to temporarily or permanently withdrawal of girls from school to supplement household labour may be based on experiences of lacking adequate food or labour in the household, while ignoring the future benefits of education. Individuals' livelihood situations, beliefs and dispositions – habitual behaviour embedded in one's habitus – therefore shape pathways.

Habitus is an aspect of individuals' mental structure that arises from a field of relationships between social positions – a set of objectively-given relationships with structural or systematic properties (Barnes, 2000). Habitus was coined by Bourdieu (1990) to mean habits that are shared by a group or a community of actors (Giddens, 1979). Individuals' decisions are therefore shaped not only by their experiences and present circumstances but also by the sum of shared cultural understandings (De Bruijn & van Dijk, 2003, 2005). Some understandings are taken for granted or what Bourdieu called *doxa*- or 'the natural attitude' or Durkheim's *conscience collective* (Myles, 2004). The decision-making process in a situation of livelihood vulnerability that culminates into pathways is therefore a result of a network between habitus, doxa, and fields. According to Bourdieu, a field is "a network or a configuration, of objective relations between positions" (Bourdieu & Wacquant, 1992: 97). It is a space where the privileged and unprivileged meet and struggle for control over resources (Dumais, 2002). In other words, actors occupy a certain social space in which they compete for positions (Anheier *et al.*, 1995). Decision-making is therefore related to the competition for resources, which is exacerbated in the era of HIV/AIDS. In the context of HIV/AIDS, the web of individuals' pathways – based on the magnitude of human diversity – forms part of the wider social context that influences affected children's school attendance, access to learning materials, participation in classroom activities and interaction with teachers and peers. Teachers' responses to the behaviour and actions of children affected and made vulnerable by HIV/AIDS are also influenced by the nature of webs of their own pathways, pupils' pathways, and those of the parents or guardians. Hence, various aspects of the school contexts and systems affect teacher competence including performances, behaviours, perceptions, and professional relations. Drawing on Clandinin & Connelly (1995, 1996), I argue that HIV/AIDS is a scene on teachers' professional knowledge landscape that influences their competences to teach in such a context. In the thesis, I explore how individuals' (both adults' and pupils') livelihood-related decisions affect school processes including teaching, learning, and interaction therein. I explore the effect of HIV/AIDS on the teaching-learning process through focussing on teacher competence and pupil competence.

1.6.3. The concept of competence

The history of the concept of competence is traceable back to the 1860's (Biemans *et al.*, 2004). The definition of competence is contentious because competence frameworks, conceptions, and definitions vary from country to country, organisation to organisation and profession to profession. These include the behaviourist approach (characteristic of the United States), functional approach (characteristic of UK), and holistic approach (France, Germany, Austria, the Netherlands) (Le Deist & Winterton, 2005). In the UK alone, it is used in five different ways (Mansfield, 2004). Competence as a concept is so broad that it can mean anything between "ready to start work-based learning to being highly reliable and proficient" (Eraut, 1994: 168). Its development takes place in a continuum from novice to expert (Dreyfus & Dreyfus, 1986). It includes coping with crowdedness, seeing actions at least partially in terms of longer-term goals, conscious deliberate planning, standardised and routinised procedures (*ibid.*). The fluidity of the concept of competence gave me an opportunity to apply it to teachers as well as pupils. I look at how the teaching environment influences teachers' competences. I also analysed pupils' academic competencies drawing on the iceberg competence model (Spencer & Spencer, 1993). I use the concept of 'communities of practice' (Lave & Wenger, 1991; Wenger, 1998), and argue that pupils' interaction as a community of individuals with common practice influences their gendered academic competence. I then highlight the role of HIV/AIDS impact in shaping the classroom interaction.

1.6.4. Intersectionality

The intersectionality of the various issues, which frustrate the struggle for gender equality, is of fundamental importance to the analysis and arguments presented in this thesis. I argue that the livelihood pathways of pupils, teachers, and parents in dealing with AIDS-related stress not only influence, but are also influenced by school processes. Different categories of pupils, parents, and teachers face various livelihood challenges to which they respond according to societal values, power relations, asset availability and so on. Although individuals are active agents who are able to survive in the era of HIV/AIDS, how compatible are their pathways with educational gender equality? Since we have

individuals with various identities and interests, how differentiated are their pathways? Some pathways must indeed criss-cross. For example, a poor, orphan, girl child, in rural Uganda has to cope in various ways relevant for the numerous identities she occupies. Her pathways are part of those of her household and community. These intersect with those of other individuals and households. In such a situation, the question to ask is; how dense are the networks between an individual's pathways, those between individuals, and those between households, communities, and locations? In this thesis, I look at the role of HIV/AIDS in the multiplication of intersections between different human identities. I focus on the identities that were relevant for this research, namely: gender, age, class, and status of AIDS-affliction.

So far, I have explained how gender relations and social patterns influence capability fulfilment or deprivation. Furthermore, gender relations affect household decision-making and livelihood pathways or responses to stressful situations. Such responses influence school processes and the inherent gendered relations. In the context of HIV/AIDS, irregular school attendance, exchange of sex for material needs by girls, tardiness, involvement of children in income earning, and reduction of household expenditure on education are ways of responding to its socio-economic impact. We therefore have a range of interrelated and interdependent issues that intersect in intricate ways to yield gender inequalities. However, the key concepts and issues upon which this thesis builds are rural household livelihood and HIV vulnerability, teacher competence, classroom interaction, children's rights, and intersectionality. These key concepts constitute the core of the different chapters and their interrelationships are diagrammatically illustrated in Figure 1.2.

1.7. Epistemological background and methodology

In this section, I present the methodological and epistemological considerations and choices upon which the study is rooted, the sources of data and the entire research process.

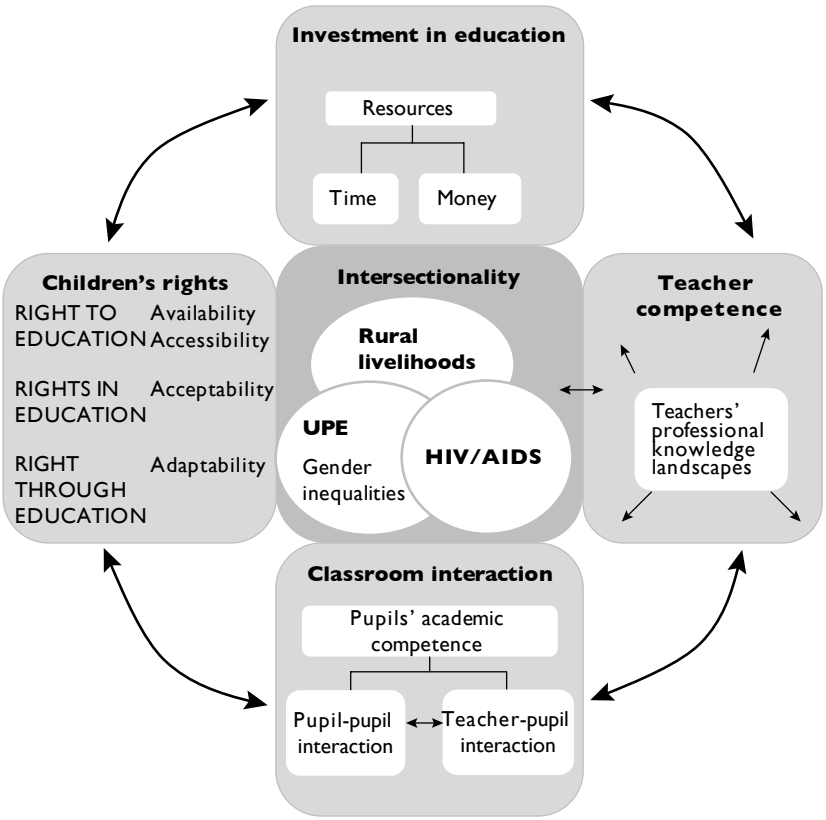

Figure 1.2. Connections between key concepts of the study.

1.7.1. Methodological considerations

Methodological considerations include the "positioning and tensions in research ontologies, epistemologies, and axiologies" (Dillon & Wals, 2006: 3). Ontology refers to the nature of reality (what), epistemology is how knowledge is made and axiology includes the ethical considerations and philosophical view points (*ibid.*). This research sought for indicators that could explain the persistence of gender inequalities in UPE. I therefore researched people's knowledge, attitudes, behaviour, within the entire school setting and environment.

I did this by watching, listening, asking questions, and interpreting whatever I found out.

My field experience was characterised by social construction. I noted that at the beginning of the data collection process, some informants gave me 'calculated' responses. For example, one woman lied about her education level because she thought I was looking for adult women in need of literacy skills to hold workshops with them. There had been some workshops of that nature in the past where participants were given lunch and a daily allowance. An elderly couple conspired to hide the effect of HIV/AIDS on their household. As soon as I arrived in the village, I learnt about the illness of their only surviving son who was bedridden in their house. However, they insisted that they did not live with any other adult because they considered me a stranger to whom they did not have to expose their affliction. I later began to discover the lies from neighbours and friends who volunteered information about others. This prompted me to work at building more rapport – a relationship of mutual trust and friendship. This was calculative on my part also. The relations that were constructed between the informants and me during the research process influenced the type of data I got. This is because humans have a consciousness. They actively experience, interpret the world, and behave according to this interpretation. Social reality must hence be seen as a subjective construction based on interpretation and interaction, because all human actions have meaning and cannot be understood separately from this meaning. Every social researcher therefore must make considerations at the onset about how much epistemological weight they attach to agency or structure (Bernhagen, 2001).

The primary task of social explanation is the discovery of societal regularities and patterned outcomes. This can be achieved through acknowledging social constructivism or the view that "the manner in which the material world shapes and is shaped by human action and interaction depends on dynamic normative and epistemic interpretations of the material world" (Adler 1997: 322). It is rooted in the belief that human behaviour is meaningful and directed towards the achievement of a purpose. A constructivist approach therefore closely parallels the philosophical underpinnings of this study. This thesis ascribes epistemological and ontological primacy to the human

agency. Analysis is rooted in the actor-oriented approach (Long, 1992), which recognises the role played by human action and consciousness. However, putting human agency at the centre of the inquiry does not imply that I ignored social variables, or the fundamental importance of social structure in shaping the particulars of individual lives. I have already expressed my view about the influence of structural boundaries on individuals' responses to HIV/AIDS. Indeed, "the notions of action and structure pre-suppose one another" (Giddens, 1979: 53). In order to clarify the structure-agency question, Giddens integrated both categories into the concept of 'duality of structure' or "the essential recursiveness of social life, as constituted in social practices" (*ibid.*: 5). According to Giddens, actors hold knowledge about the conditions under which the social structure is produced and reproduced in interaction. Structure thus forms 'personality' and 'society' simultaneously though not exhaustively due to the 'unintended consequences' and 'unacknowledged conditions' of action (*ibid.*). The bottom line is that social science is concerned with meaningful action of human agents because social systems have no purpose, reason, or needs, but human beings do. The actor-oriented approach seeks to explain differential responses to similar structural circumstances – for example, why girls and boys devise different pathways to AIDS-induced poverty. Such fundamentals place immediate requirements on research design, methods and choices explained in the next section.

1.7.2. Research design, Methods and choices

The study aimed at understanding individual, contextual, and institutional barriers to gender equality in educational access and attainment. A holistic research strategy capable of taking track of events, processes, structures of households and communities as well as behaviours and attitudes of individuals was deemed most appropriate. I sought to understand the daily experiences, behaviours, and attitudes of children in a school situation, as well as those of parents and children in a household-community setting. An interpretive research approach is useful in understanding human behaviours and experiences at such a holistic level (Berry, 1999). The study thus adopted a broad interpretive ethnographic research design.

Ethnographic research is "the study of both explicit and tacit cultural knowledge" (Spradley, 1980: 8). Explicit cultural knowledge can be consciously communicated whereas tacit knowledge is part of culture but is difficult for informants to express consciously. The ethnographer must seek and distinguish between *information given* (consciously) and *information given-off* (unconsciously) by actors in trying to foster desirable impressions to the audience (Goffman, 1959). That is why an ethnographer must make inferences about people's knowledge by listening carefully to what they say and observing their behaviour (Spradley, 1980). According to Geertz (1973; 1976), doing ethnography is "thick description"[6] and requires an intellectual effort aimed at an elaborate interpretation of culture. Ethnography enables the researcher not only to observe and share everyday activities but also to ask individuals to explain their behaviours and choices (Taylor, 2000). The perception of research subjects as agents requires open-mindedness and obliges the researcher to be an active agent, who in addition to producing ethnographic texts, influences the social fieldwork setting. That is when '*verstehen*' (empathy or inter-subjectivity) becomes relevant. I strived to achieve a level of mutual understanding of the complex processes in order to recognize the meanings embedded in my own actions vis-à-vis those of my informants. The investigation thus included observation of individuals' interaction behaviour in the household, community and institutional settings as well as tracing their trajectories and how these intersect. It also involved careful selection of the study sites and population that facilitated the execution of ethnographic research. Following is an explanation of the sampling strategy and data sources.

1.7.2.1. Sampling strategy

Sampling or the selection of the site, time, people and events (Merriam, 1998) is a crucial stage of any research process. I adopted a purposive sampling strategy in this research. This is a criterion-based sampling

[6] He used the example of the distinction between a 'wink' (controlled contraction of eyelids- as a signal) and a 'twitch' (uncontrolled contraction of eyelids). The act of twitching has no underlying meaning, but the wink is intentional- to communicate a message. 'Thin' description is the winking, and 'thick' description, the symbolic meaning behind the act.

in which 'rich' cases are selected to enable the researcher discover, understand and gain more insight on crucial study issues (*ibid.*). Although purposive sampling can be a possible source of bias, it was justifiable for use in this study given the wide distribution of schools and districts across the country and the heterogeneous nature of the Ugandan population (in terms of culture, livelihood strategies, and HIV/AIDS impact). The nature of the problem therefore dictated the sampling strategy.

My interest in studying rural livelihood and school interaction influenced my choice of a rural location. The research was conducted in Luweero district in central Uganda (see Annex I). I based my decision to select Luweero district on its rural location and history of high HIV/AIDS prevalence. By December 2002, Luweero district was among the 10 districts with the highest number of clinical AIDS cases among the then 46 districts for which data were available (Ministry of Health, 2003). The number of clinical AIDS cases had reached 1,988 out of a population of 478,595 (UBOS, 2005).

One sub-county was purposively selected due its typical rural location albeit easy accessibility. Three schools were also purposively selected for in-depth study[7]. These were two government schools (herein called Tumo primary school and Tulo primary school) and one private school (Tuso primary school). At the school level, specific individuals were purposively selected for in-depth study. These included children affected and made vulnerable by HIV/AIDS[8], teachers, head-teachers and members of the School Management Committees (SMC). The study was focussed on specific AIDS-affected and AIDS-afflicted[9] households from whom sensitive livelihood experiences were sought. Twelve households per school village participated in life history interviews

[7] For purposes of confidentiality, the real names of the schools and the study sub-county remain undisclosed.

[8] Children affected and made vulnerable by HIV/AIDS included those who had lost parents, had a sick person in their household, and those whose household hosted or supported an orphan(s).

[9] AIDS-afflicted households are those whose member(s) is/are living with HIV/AIDS or has/have died due to HIV/AIDS whereas AIDS-affected households are supporting an AIDS-afflicted household-for example through hosting orphan(s) (Barnett & Blaikie, 1992).

Table 1.1. Number of informants per category.

School/Village	Level	Tumo	Tulo	Tuso	Total
Participant observation	No. of schools	1	1	1	3
	No. of households	3	3	2	8
Ethnographic conversations	School conversations (teachers)	5 (3F, 2M)	5 (2F, 3M)	5 (2F, 3M)	15 (7F, 8M)
	School conversations (pupils)	10 (5F, FM)	10 (5F, FM	10 (5F, FM	30 (15F, 15M)
	No. of households	12(6F, 6M)	12(6F, 6M)	12(6F, 6M)	36(18F, 18M)
Life history	No. of households	12(6F, 6M)	12(6F, 6M)	12(6F, 6M)	12(6F 6M)
Ethnographic focus groups	No. of pupils	28 (14 F, 14M)	28 (14 F, 14M	28 (14 F, 14M	84 (42 F, 42M)
	No. of parents	20 (11F, 9M)	18 (9F,9M)	4 (0F, 4M)	42 (20F, 22M)
	No. of school dropouts				11 (5F, 6M)
In-depth interviews with key informants	MoES				3
	MGLSD				1
	MOH				1
	NGOs				2
	District officials				3
	Sub-county level				3
	Total KIIs				13

NB: F= Female (or female headed household); M= Male (or Male headed households).
Source: Author.

and ethnographic conversations. These included six AIDS-afflicted households (three male-headed, three female-headed), and six AIDS-affected households (three male-headed, three female-headed).

In the selection of schools and/villages, I considered their remoteness to the trading centre, school quality and consequences for access to school facilities including trained and motivated teachers. Tumo primary school was located furthest to the trading centre (about 4 km away). Its quality was the worst among the three schools. It suffered more financial and human resource scarcity. Tulo primary school was located in a distance of approximately 1 kilometre from the trading centre. It appeared to have better access to financial and human resources and was therefore more organised. The quality of schooling was therefore better than that at Tulo. Tuso primary school was bordering the trading centre. Being a private school, it had more financial resources and better motivated and trained teachers.

1.7.2.2. Data Sources

Data sources include the methods, tools, or instruments used for data collection. The data were collected using participant observation, life history interviews with parents, school pupils and teachers, ethnographic conversations, Focus Group Discussions (FGDs), and in-depth interviews with key informants herein referred to as Key Informant interviews (KIIs).

i) Participant observation (PO)
Participant observation is a feature of ethnographic research that helps the researcher to get started (Spindler & Hammond, 2000). It facilitates the researcher in building rapport and becoming non-threatening to the subjects. The long period spent in the community contributed to the validity of the data. I managed to experience acts and events several times and therefore establish regularities and irregularities. Although participant observation takes a long time and is difficult to use to study large geographic areas, it was particularly useful because it captured actual rather than reported behaviour.

Participant observation was used to get useful insights into community, household and school systems and how these work not only to prevent

girls from accessing education, but also participating and achieving as highly as the boys did. The process commenced with schools, which provided an excellent entry point into the community. I worked as a volunteer teacher for two terms[10] at each school observing the classroom and school environment and activities. At each school, I taught at least 36 lessons and observed 10 others. I watched, listened to, learnt and interpreted actions, behaviours and events as they occurred. For example, I observed pupils sharing pens, pencils, erasers in the classroom. I observed them playing, fighting, eating, being punished, arriving and leaving school. I also observed teachers teaching, gossiping, conversing, laughing, and complaining about various issues. Combining the roles of teaching and researching was useful especially since both activities are characterised by reflection (Wong, 1995). During the first stages of the fieldwork, I allowed issues to unfold themselves and the views of the subjects dominated the analysis. I used an observation checklist to ensure consistency among the three sites but other issues that spontaneously cropped up and were unique to specific sites were observed as well.

My presence at the schools enabled me to gradually make contacts in the villages through pupils and teachers. Observations were undertaken in eight selected households (three from each UPE school village and two from the private school village). Within households, I observed daily routines, including all scheduled and most un-scheduled events and activities. I observed household members' daily routines and tasks. I participated in conversations with them, went to funerals, church services, market days, and celebrations. Issues concerning children's rights, obligations, behaviour and problems, as well as privileges were observed.

One of the essential attributes of participant observation is that it relies on the accumulation of emic (the actor's or insider's point of view) rather than etic knowledge (the point of view of the detached, external observer) (Pike, 1967). However, both emic and etic analyses

[10] I began the research by working at Tumo school/village three days a week and Tulo school/village two days a week during the first four months. In the following four months, I worked at Tumo one day, Tulo two days and Tuso two days a week. The last four months were spent working at Tumo for one day, Tulo one day and Tuso - three days a week.

revealed significant realities about culture and society. Observation data were recorded in the form of field notes that were categorised into observational notes (records of what was seen or heard) and analytical notes (inferences from observational notes) (Schatzman, & Strauss, 1973).

I chose participant observation as a method because of its advantages. It represents a rich source of high-quality first-hand information. It also gives the researcher insights into individual as well as group behaviour. For example, I was able to observe the behaviour of individual pupils and teachers but also the group behaviour of both pupils and teachers, as well as parents and children. I managed to validate conversation data because of my constant presence in the community. In addition, participant observation is a very flexible approach because it helps the researcher to minimise the bias that results from deciding in advance what is/is not important when studying social behaviour. However, although great care was taken to carry out non-intrusive observation or to avoid prompting the research subjects to alter their behaviour, this was not a major limitation. The major weakness of using participant observation in this research was that it gave limited opportunities to grasp past social reality. There was thus a great necessity to triangulate the methods.

ii) Life histories

The limitations of participant observation in terms of inability to collect data on past events and actions (Bleek, 1987), were overcome through employing life history interviews. Life histories have been used successfully to understand individual-community relations, and to study the socio-historical contexts in which schools operate (Stephens, 2000). According to Stephens, life history research "concerns the relationship between two inter-dependent worlds: that of the individual within their unique *life story* and that of the past, present and future *contextual* world through which the individual travels" (Stephens, 2000: 32). It is thus the story "located within its historical context" (Goodson, 1992). Its format provides the informant with an opportunity to articulate their daily activities, explain their experiences and choices and reflect on the consequences (Gysels *et al.*, 2002). Life history data indeed facilitated the understanding of household members' pathways to HIV/AIDS impact. My technique of life history interviewing draws upon Vayda's

(1983) progressive contextualisation. Progressive contextualisation involves focussing on human activities or people-behaviour and then explaining them by placing them in progressively wider or denser contexts (*ibid.*). For example in order to understand gender inequalities in UPE, I focussed on specific behaviour and actions of pupils. I then traced their causes backwards in time and outwards in the structural space. I constructed chains between various events such as prolonged illness, death, and adjustment of living arrangements for example among orphans. I then strived to understand the causal explanation of chains and the consequences for such affected children's schooling. Life history interviews and participant observation were undertaken concurrently to allow for triangulation. Willing household members narrated their histories in order to come up with a complete case of family history. Collection of life stories required making at least three visits per household. These were particularly useful in revealing the gender relations, how they had changed over time, how HIV/AIDS had affected household livelihoods and the consequences for girls' education. Life history data were recorded in notebooks, diaries and on audiocassette tapes.

iii) Ethnographic focus group discussions (FGDs)
Whereas participant observation and life history data are less managed and are collected from a natural setting/environment, this is not the case in focus groups. Focus group data are limited to interaction in the discussions and observation of managed verbal and body behaviour. However, focus groups offer a unique occasion to collectively interview participants as well as to observe them interacting while discussing (Suter, 2000). The advantages of focus groups include their ability to facilitate interaction and give access to informants' attitudes and experiences (*ibid.*). Rather than provide the best environment for naturalistic observation (as in PO) or direct probing (as in life stories), they are excellent in combining the two advantages, which is of unique importance (Suter, 2000).

My technique of FGDs draws on Press & Cole's (1999) 'ethnographic focus groups' and Suter's (2000) 'narrative focus groups'. Ethnographic focus groups are designed to be as unobtrusive as possible and narrative ones include the collection of stories. Both techniques help to make the data more natural and valid compared with traditional FGD designs.

I used ethnographic FGDs to study 'special' categories of research subjects. I expected to get the best observation and interaction data from HIV positive parents and/or guardians, pupils who had lost parents to AIDS (orphans) and school dropouts. They had had direct personal encounters with HIV/AIDS and I wanted to observe the emotions involved in recounting their experiences in a group setting. My groups were comprised of seven members who agreed on the most comfortable place for the discussion. Groups of HIV-positive parents preferred to hold discussions at the health centre where they felt less stigmatised than in their homes[11]. Pupils preferred to hold discussions at school outside classroom activities because their home schedule was congested. School dropouts also agreed to meet at the health centre. At the beginning of the discussions with parents, I requested that each of them narrate the history of HIV/AIDS in their neighbourhood or their earliest memories of HIV/AIDS. Then I asked them to select a leader who moderated a 30-minute discussion on their perceptions of how HIV/AIDS had affected education in general. Orphans and school dropouts were given five minutes each to tell the group about their pasts. This approach helped participants to open up and hence allowed for further naturalisation of the interview environment. Thereafter, I took over the moderation and directed the discussion towards gaining a deeper understanding of the effect of HIV/AIDS and livelihood dynamics on girls' schooling in particular. Participants were free to speak any time but efforts were made to discourage domination of a few people by encouraging everybody to participate. The groups therefore deviated from the traditions since they were smaller and less intrusive. Parents' groups were composed of people who were friends through participation in post-test club (PTC) activities. The FGDs also began differently by recounting members' experiences with HIV/AIDS. Each group discussion lasted about two hours.

I held three types of FGDs – pupils, dropouts and HIV positive parents. For pupils twelve FGDS (four per school: two girls, two boys) were conducted. These included children who were affected or made vulnerable by HIV/AIDS. One group per category was taken from

[11] Parents & guardians living with HIV/AIDS were members of a post-test club that met at the health centre once a week to share experiences, support each other emotionally and access counselling and treatment for opportunistic diseases.

upper primary (specifically primary/class six [P.6]) and another from the lower classes (specifically class three [P.3]). Two FGDs of school dropouts were also carried out. The female group had five participants and the male one had six. All FGD data were audiotaped. I held six FGDs with parents/guardians living with HIV/AIDS (three female and three male). This implies that a total of 42 PHLA's participated in FGDs. Although selection of their participation was voluntary, it emerged that 38 out of 42 had children in UPE schools and only four sent theirs to the private school.

iv) Ethnographic conversations

My technique of ethnographic conversations drew on Lofland & Lofland's (1995) 'guided conversations'. A guided conversation is a talk between the researcher and the informant guided by the researcher with the aim of increasing understanding of an issue or uncovering other issues (Lofland & Lofland, 1995). A guided conversation is less structured than an ordinary interview that relies on a list of questions, which must be asked. Guided conversations can take place anywhere the informant is comfortable. A modification of guided conversations is what I call 'ethnographic conversations'. I define an ethnographic conversation as a talk between the researcher and the informant(s) in a natural setting guided by the researcher. The aim is to make the verbal exchange as unobtrusive and unstructured as possible. In this research, I held ethnographic conversations in unstructured school and home settings.

Within the schools, I held conversations with male and female teachers and pupils. Fifteen teachers (five per school) participated in the conversations. These included the head teacher, senior male teacher, senior female teacher, a representative of teachers of lower classes (P.1-P4) – who was female – and one for upper classes (P-5-P.7) – who was male. Informed consent was obtained at the beginning of the fieldwork from the teachers to last the entire research period. The conversations were held to get deeper understanding of unexplored issues or to follow up on issues that arose out of observations, FGDs and life stories. Ethnographic conversations with teachers were very useful in providing data upon which the composite portraits reported in Chapter 3 were compiled. Conversations with pupils were usually short (10 minutes on average). They were carried out in the school

premises – usually during the breaks when pupils were redundant. Conversations increased understanding on research issues observed or those that came out of life stories. Many conversations with pupils occurred spontaneously but about 10 in each school took place after careful planning. Within households, conversations were carried out during the observations to get clarification on unobvious realities. In addition, they helped in the process of filling in gaps in the life stories. They were held at the informants' homes during normal routine tasks such as gardening or food preparation. Conversation data were recorded in notebooks except those that followed up on life histories.

v) Key informant interviews (KIIs)
Key informants are people who have good knowledge of either the community being studied or the subject under investigation. A key informant may thus be a professional person or a member of the target population (Kumar, 1989). Although key informant techniques have been used in anthropological studies to collect ethnographic data (Tremblay, 1957), I used them to collect more general data from district officials, NGO staff, and other government officials at the ministries in charge of education, gender and health.

In the early stages of the study, I used KIIs to collect background information necessary to facilitate sampling. This included HIV prevalence data, location of village schools and possibilities of acceptance of the research. As the research progressed, I held interviews with local NGO representatives to understand the nature of services provided to support HIV/AIDS activities. I later held KIIs with government officials at the Ministry of Education and Sports (MoES), Ministry of Gender, Labour and Social development (MGLSD), Ministry of Health (MoH) and district officials. The data collection methods and study population explained above are summarised in Table 1.1.

1.7.3. Data management and analysis

I began analysis in the field with continuous recording of and reflection on the data. I drew on the techniques of 'template analysis' (King, 1994) and 'asking the other question' (Matsuda, 1991, Bender, 1994). Template analysis involves making use of an analysis guide with themes according to the research questions and objectives. I handled

the different sources of data both independently and concurrently. For example, life history and observation data were analysed both independently and concurrently because they supplemented each other. Households whose members' stories were not consistent were either observed more often or deleted from the sample depending on the magnitude of inconsistency.

Tape-recorded data were transcribed and coded for relevant themes using the QSR NUDIST qualitative data analysis software. Transcripts were read and re-read to discover the various intersections between gender and other categories of difference. Field notes were coded and taken through the process of interpretation. All data were analysed for intersectionality through listening, reading and interpreting against the grain. This included careful listening and watching out for information given-off. In the process of reading and re-reading, the technique of 'asking the other question' (Matsuda, 1991; Bender, 1994) was employed. For example if a girl came to school late because her home was far away, I still looked at the notes carefully in order to find out if the tardiness was related to gender, or economic disadvantage, or AIDS affliction. Despite the complexity of social life and the difficulty of demarcating boundaries between categories, I tried to focus on various groups of girls at neglected points of intersection to identify their unique vulnerability, as I elaborate in detail in Chapter 6. This is similar to what was later termed as intracategorical complexity – attempting to look at a social group in terms of all its detail and complexity by focusing on how categories are produced, reproduced and experienced in everyday life (Mc Call, 2005).

1.7.4. Ethical procedures

Permission was obtained from the Uganda National Council of Science and Technology and Luweero district administration. Permission was also obtained from village political leaders and school administrators. Informed consent was sought from household heads on behalf of pupils. All research subjects (pupils, teachers, parents) were constantly assured that their confidentiality and anonymity would be guaranteed. They were encouraged not to answer any questions that made them uncomfortable and promised that only the research team would have access to the raw data. Respondents were informed that the tape-

recorded data would be destroyed two years after the completion of the research.

1.7.5. Summary of the research process

The study was carried out in three major phases as reflected in Figure 1.3. Phase 1 was mainly for planning and preparation for the implementation of phases 2 and 3.

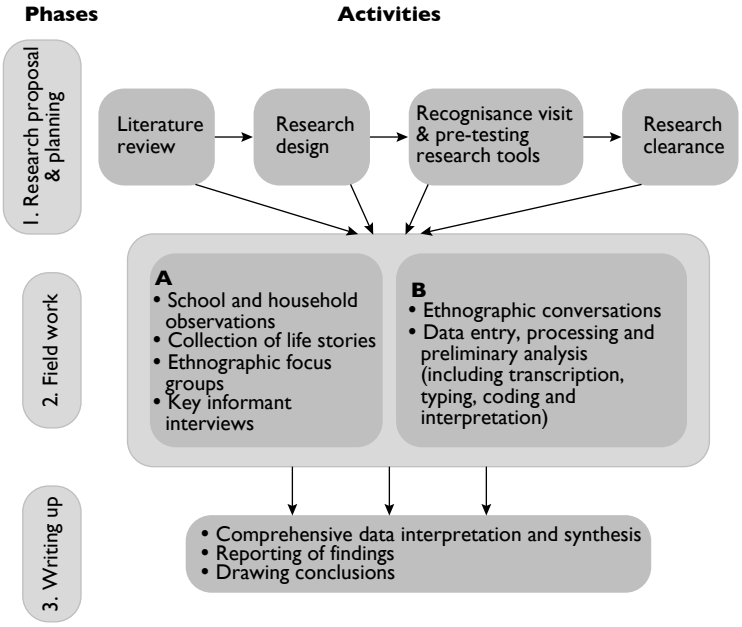

Figure 1.3. Phases of the study. Source: Author.

1.8. Limitations of the study and reflecting back on the research process

The research process was quite complex characterised by time constraints. Selection of three study sites for ethnographic study was rather ambitious. The process of data collection and analysis was expensive in terms of both money and time. However, the technique of participant observation was extremely enriching because it enabled me to obtain genuine and more authentic responses to questions/ issues raised in conversations, undistorted as much as possible by my presence. For example, at the beginning of the fieldwork when I asked pupils about arrival at school, boys and girls gave the impression that they arrived later. I was however able to observe pupils' tardiness after staying in the field longer. Life stories on the other hand were too strenuous. Although they provided the required data, I spent up to four days collecting one story. Thereafter, I had to transcribe the tapes and type the story for proper analysis. Although this was quite tedious, it was overcome by persistence and personal expertise.

Concerning the power relations in the research process, I always tried to reflect on their influence on the behaviour and responses of the research subjects. This is because the practice of ethnography requires the researcher to engage in vigilant and ongoing reflexivity. This requires making one's biases explicit and acknowledging how biases dictate questions and category construction (Sells *et al.*, 1997). I realised that my personal values and worldview influenced purposive selection of informants. For example, in selection of pupils' whose households were observed, I tried to avoid those whom I considered exceptionally naughty or difficult to study based on my subjective opinions. I also realised that some people in the communities volunteered information about others perhaps because they wanted to establish friendship with me. I definitely looked different from them. They knew I had a job so they expected help from me from time to time. This could have influenced their behaviour and responses. Ethnographers practice reflexivity through the writing of reflexive journals, field, notes, and memos (Sells *et al.*, 1997). I kept reflective records of notes, ideas, fears, mistakes, confusion, and problems that arose in the field. I had different types of notes. In observational notes, I recorded events experienced principally through watching and listening. They do not

contain any interpretation. In theoretical notes, I attempted to derive meaning from the observational notes or to make inferences from the data of a particular event. The problem with theoretical notes was that it was not possible to derive meaning from all incidents because they continued to be puzzling. As an ethnographer, I found myself in a dilemma because I had to interpret the meaning of events and incidents while taking care not to impose my personal biases. For example, I had to remember to suppress my strong feelings against the unequal gender relations in the household particularly obvious in the division of labour in order to discover the contributions made by males to household labour. This reflective thinking on the timing of the operation, stage setting, ordering, and content of questions aimed at avoiding bias constituted the methodological notes. The principle of recording observational data in 'distinct packages' as elaborated by Schatzman & Strauss (1973) was particularly useful because it simplified the thesis writing and if I had to do ethnography again, I would still apply it.

Ethnography requires the researcher as an outsider to take the position of an insider in the research community (Roberts & Sanders, 2005). Few would deny that an insider takes for granted many issues obvious to an outsider. As an outsider, I was able to question many activities and perspectives that pupils and teachers took for granted. However, being an outsider limited how deeply I could immerse myself in the lives of pupils. No matter how hard I tried to locate myself among pupils, I could only take the position of a teacher and not a pupil. I therefore still had the feeling that some information could have been deliberately kept from me because the extent of pupils' trust had limits. Therefore, researching pupils from the teachers' point of view was challenging. I could not turn myself into a pupil, yet I wanted to experience life from their point of view. This was a real methodological paradox. I sometimes used audiocassette tapes and left the classroom to allow them 'free interaction'. This means that I could listen to what happened in my absence, but I missed the emotional observable realities.

Ethnographic research is supposed to be as non-intrusive as possible (Harris, 2003). In order to achieve total non-intrusion, one should only observe and participate without necessarily holding interviews or group discussions. However, the problem is that the researcher

assumes too much authority in the process of interpreting and analysing people's lives. In such a situation, there is no opportunity for community members to give their own perspective of things. I used ethnographic FGDs and conversations, which were modified to make them less intrusive yet more empowering to the informants.

I faced ethical dilemmas. For example, I was obliged to ensure anonymity and this made it impossible to reveal some of the sensitive findings that could have strengthened my arguments. Although this challenge was remedied by making use of composite portraits (Polakow, 1992), it is similar to journalists' dilemma about whether or not to reveal 'bad' pictures in a war situation. In addition, getting informed consent for children less than 18 years was problematic. I had to obtain it from parents and the school administration, which was extremely tedious.

1.9. Thesis overview

This thesis is composed of seven chapters (for a diagrammatic overview see Figure 1.4.)**.** Chapter 1 is the general introduction including background to the study, theoretical beliefs, and methodology. In Chapter 2, I bring out the effect of the interface between AIDS-induced poverty and AIDS orphanhood on household capacity to invest in education, and hence the persistence of gender inequalities in UPE. Chapter 3 looks at the question of whether or not primary school teachers have the necessary competencies to promote gender equality in the rural context of HIV/AIDS in Uganda. Chapter 4 addresses how the gendered nature of classroom interaction and pupils' academic competencies follows from the impact of HIV/AIDS on rural livelihoods. It also poses the question of whether or not academic competence is enough. Chapter 5 addresses the complexity of achieving gender equality in pupils' capabilities to enjoy educational rights in the era of HIV/AIDS. In Chapter 6, I introduce the concept of 'intersectionality' in articulating a conceptual space within which a broader understanding of gender inequality can be situated. Chapter 7 presents the general discussion and conclusions.

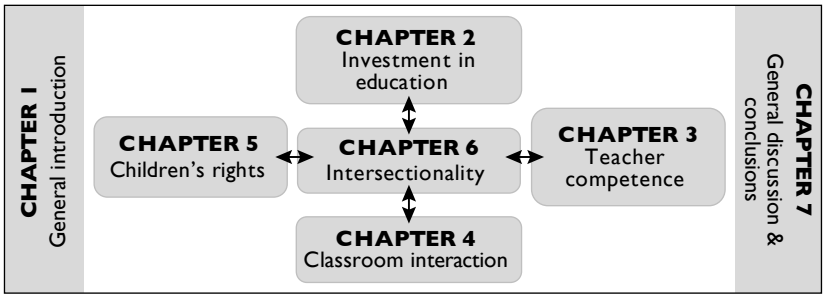

Figure 1.4. Diagrammatic representation of the thesis overview. Source: Author.

Chapter 2
HIV/AIDS and gender inequality in education: A vicious cycle in rural Uganda[12]

Doris M. Kakuru

Abstract

Despite the implementation of Uganda's Universal Primary Education (UPE), achievement of gender equality has remained more of a myth than a reality. I carried out ethnographic research to discover why gender inequalities persist despite deliberate measures to eradicate them. This chapter answers the question: does HIV/AIDS contribute to the persistence of gender inequality in rural areas? The findings reveal that HIV/AIDS affects household access to essential livelihood assets. Household responses to the impact of HIV/AIDS decrease children's capabilities to attend school, learn and participate equally. Such responses included girls' involvement in sex for economic gains, which exposed them to the risk of contracting HIV. The effect of HIV/AIDS on gender equality was more pronounced in UPE schools than the private school involved in the study. There is a vicious cycle of HIV/AIDS and gender inequality that could possibly be broken by expanding access to Antiretroviral Therapy in rural areas and providing pupils with adequate school requirements.

Keywords: AIDS orphanhood, AIDS-induced poverty, educational gender equality, rural livelihoods, vulnerability

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[12] A slightly modified version of this chapter is currently under review by COMPARE (the official Journal of the British Association for International Comparative Education) as Kakuru, D.M. HIV/AIDS and gender inequality in education: A vicious cycle in rural Uganda. This chapter is also based on Kakuru, D.M. (2005) HIV/AIDS and the Gender Gap in Education: A Vicious Cycle in Ugandan Rural Areas (Presented at the 8th UKFIET Oxford International Conference on Education and Development, 13-15 September 2005, Oxford, UK).

2.1. Introduction

> *"The interface between education and HIV/AIDS needs to be analysed and understood to better answer the challenges of gender equality in education and the eradication of the epidemic." (UNESCO, 2004: 14).*

According to the Joint United Nations Programme on HIV/AIDS (UNAIDS) and World Health Organisation (WHO), the number of people living with HIV worldwide by the end of 2005 was 40.3 million (UNAIDS/WHO, 2005a). The figure for sub-Saharan Africa increased from 24.9 million in 2003 to 25.8 million in 2005, constituting two-thirds of all persons living with HIV and 77% of all women with HIV (UNAIDS/WHO, 2005a). About 880,000 people out of a total population of 24.4 million in Uganda are living with HIV (UNAIDS/WHO, 2005a, b). According to UNAIDS (2004), teenage girls are five times more likely to contract HIV than boys. In Uganda, women account for more than half of all adults living with HIV/AIDS (UNAIDS, 2004).

The impact of HIV/AIDS on humanity has been well documented. HIV/AIDS has exacerbated the growth of poverty in many developing countries (Cohen, 2002). AIDS-induced poverty characterises many parts of the developing world where people live daily with the impact of HIV/AIDS. 'AIDS-induced' in this chapter is used to emphasise that HIV and AIDS create a unique kind of poverty even among poor households and communities. They attack livelihoods in a holistic manner, with an impact operating along a continuum between very short and very long time perspectives (Barnett & Whiteside, 2002). It has therefore been described as a long-wave event (Barnett & Whiteside, 2002; Whiteside, 2003; Whiteside *et al.*, 2003) implying that there is no quick fix for it. According to Baylies (2002), AIDS is not a shock just like any other but one with very specific characteristics – its effects are cumulative and their alleviation requires a multi-pronged approach. HIV/AIDS has had detrimental consequences on the capacity of the household to function as 'an economic unit' (Mann *et al.*, 1992). According to UNAIDS (2004), HIV/AIDS is seriously attacking the agricultural sectors of many African countries and estimates show that by 2020, the epidemic will have claimed lives of at least one-fifth of agricultural workers in Southern Africa. Every person

on earth is living with AIDS in some way because of the magnitude of its impact (Haddad & Gillespie, 2001), which is expected to persist even after the epidemic has been controlled (Whiteside, 2003). The world has for example applauded Uganda as one of earliest success stories in reducing HIV prevalence (Hogle *et al.*, 2002; Mirembe & Davies, 2001; UAC, 2003). Yet, the socio-economic impact of HIV/AIDS continues to manifest widely (*e.g.* see UAC, 2003; Rudolph & Musau, 2005). In Uganda access to free Antiretroviral Therapy[13] (ART) from Ministry of Health facilities was estimated to be at 10,600 in 2005 out of 114,000 clinically eligible people[14] living with HIV/AIDS (UNAIDS/WHO, 2005a, 2005b). Besides, challenges associated with access, barriers to ART adherence limit its potential therapeutic benefits. Non-adherence to ART has been associated with factors such as poverty, stigma, food insecurity, drug side effects, and large pill burden (Bikaako-Kajura *et al.*, 2006). The impact of HIV/AIDS on all aspects of life therefore remains eminent. In many ways, it is a major challenge to the achievement of Millennium Development Goals (MDGs) (Whiteside, 2003).

Universal Primary Education (UPE), achievement of gender equality and combating HIV/AIDS are among the MDGs to be realised by the year 2015. There is almost universal consensus and ratification of international treaties on the need to achieve gender equality in education, but two-thirds of the estimated 860 million illiterate people worldwide are females (Colclough, 2004). UPE in Uganda is the provision of basic education to children of school-going age. After the implementation of UPE in 1997, tuition fees and Parents and Teachers' Association (PTA) charges were abolished. The aim of UPE was to increase educational access and fulfil other national economic, social and political objectives (Bategeka & Okurut, 2006).

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[13] "The ART care package includes Highly Active Antiretroviral Therapy, voluntary counselling and testing, prevention of further HIV transmission through information, education and communication, treatment of sexually transmitted infections and opportunistic infections, prevention of mother-to-child transmission, home-based care (including palliative care), and chemo-prophylaxis against TB. It also includes the costs of training" *(Rudolf & Musau, 2005: v)*

[14] Determination of clinical eligibility for ART includes evidence of significant immune system damage. Administration of ART takes place at health centres that fulfil the minimum infrastructure and staffing requirements set by the Ministry of Health.

This is in line with the current policy of Uganda's formal education in general, which focuses on reducing inequalities in access by gender and geographical location. In fact, the government allocates more resources (65% of education budget) to the provision of basic education rather than higher education. AIDS and sex education programs are embedded in primary school teaching (Mirembe & Davies, 2001). However, such programs assume balanced power relations. For example, children are encouraged to say 'no' to sex but the circumstances under which some of them are compelled to exchange sex for material gains remain unchanged. Uganda is one of the developing countries that have made great strides towards the 2005 gender parity goal in primary education with 49.3% of total primary school enrolment being female (Kwesiga, 2003). This progress has been a result of several measures[15] specifically aimed at eradicating gender disparities and inequalities.

Gender parity is different from equality. Gender parity is a concern for equal proportions of girls and boys enrolled in school (Aikman & Unterhalter, 2005; Ahmed & Chowdhury, 2005; Unterhalter, 2004; 2005b). Parity in enrolment does not necessarily imply equal attendance, participation or completion (McGee, 2000). Colclough (2004: 4) defined the achievement of gender equality as the provision of "equal chances to attend school, equal learning experiences and attainment levels and, indeed equal outcomes in society–in terms of personal, political and professional opportunities associated with holding particular educational qualifications." It is a concern for equal treatment and opportunity or non-discrimination (Aikman & Unterhalter, 2005; Subrahmanian, 2005). Although there is obvious progress towards parity in Uganda's primary education, equality is still far from being realised (Amanda & Amanda, 2000; Kakuru, 2003; Kasente, 2003, Kwesiga, 2003). Uganda's GEEI (Gender Equality in Education Index) has increased from 24% in 1993 to 54% in 2003, but the task is not yet complete (Unterhalter *et al.*, 2005). This research was done to understand why inequalities persist despite deliberate efforts to eradicate them. Previous studies have documented the effect of HIV/AIDS on rural households (*e.g.* Rugalema, 1999; White

[15] See Annex V.

& Robinson, 2000; Barnett & Whiteside, 2002) and on education in general (*e.g.* Kelly, 2000a; Evans, 2002; Bennell *et al.*, 2002; Mannah, 2002; Amone & Bukuluki, 2004a, b; Bennell, 2005; Caillods, 2005). However, analysis of household responses to the impact of HIV/AIDS on their livelihoods and subsequent females' vulnerability to HIV infection is rare. This chapter answers the question: Does HIV/AIDS contribute to the persistence of gender inequality in rural areas? I begin with a description of the conceptual space in which the research is situated. This is followed by a presentation of the research process and setting in rural Uganda. Next, I highlight the effects of HIV/AIDS on reinforcing household poverty situations by comparing rural private and UPE schools. I then elaborate how responses to HIV/AIDS yield and fortify educational inequalities. An explanation of the vicious cycle of HIV/AIDS and inequality then precedes the conclusions.

2.2. Education, capability, livelihoods and gender

The existence of gender equality in education has been linked with household economic wellbeing (see Schultz, 1993; Parish & Wills, 1993; Shapiro & Tambashe, 2001; Kwesiga, 2003; Colclough, 2004). Past research has also shown that educational gender inequalities are characteristic of patriarchal and patrilineal systems (ILO, 2000; Shapiro & Tembashe, 2001; Colclough, 2004). In such societies household resource distribution is not gender balanced and females' bargaining power is insufficient due to their weak fallback positions[16] (Agarwal, 1997). Educational inequality therefore feeds on the existing social structure. This analysis is underpinned by the belief that educational inequality influences and is influenced by wider social inequality. For example, Mirembe & Davies (2001) discuss how schools in Uganda are not separate from the gendered power imbalances entrenched in society. The work of Leach *et al.* (2003) shows how gender violence in schools contributes to girls' underachievement. Education has been portrayed as being responsible for reproducing inequality (Sunker, 2004), but also as an asset if perceived as an entitlement (Oxaal, 1997).

[16] A persons' fallback position as described by Agarwal (1997: 4) is *"the outside options which determine how well off she/he would be if cooperation failed" "…an improvement in the person's fallback position (better outside options) would lead to an improvement in the deal the person gets within the household."*

The normative view of education as entitlement is substantiated in Aikman and Unterhalter's (2005) interpretation of educational gender equality as respect for human rights using the capabilities approach (Sen, 1992; 1999; Nussbaum, 2000). Within the capabilities approach, gender equality is a concern for equality of treatment and opportunity or the right to non-discrimination (Unterhalter, 2003; Aikman & Unterhalter, 2005; Subrahmanian, 2005). Capabilities are what people are able to do and to be (Nussbaum, 2000), or the alternative beings and doings achievable with one's economic, social, and personal characteristics (Dreze and Sen, 1989). According to Sen (1999), poverty is a deprivation of capability and questions about social equality can best be raised in the space of capabilities. Equality improves children's capabilities to achieve the education necessary for them to develop their freedoms. Aspects of such equality include "the freedom to attend school, to learn and participate there in safety and security, to develop identities that tolerate others, and to enjoy economic, political and cultural opportunities" (Aikman & Unterhalter, 2005: 3). These aspects of equality result from access to capabilities and assets, which are important components of pupils' livelihoods.

Chambers & Conway (1992: 8) defined the term 'livelihood' as comprising "the capabilities, assets (including both material and social resources) and activities required for a means of living." According to Bebbington (1999: 2022),

> *"Assets are not simply resources that people use in building livelihoods: they are assets that give them the capability to be and to act. … they are also the basis of agents' power to act and to reproduce, challenge or change the rules that govern the control, use and transformation of resources."*

Rural households[17] are perceived as units that pursue a range of livelihood activities and outcomes facilitated by their access to assets. Their access to assets is influenced by their vulnerability context (Farrington et al., 1999; DFID, 2001). Vulnerability means exposure to and the impact of specific risk on livelihood conditions (Kaag et al., 2004). Poor people's livelihoods are never stable but are characterised by shocks and stresses. These shocks and stresses are consequences of social exclusion from access to assets in the wider social environment over which they have no control (De Haan & Zoomers, 2005; DFID, 2001). In this chapter, pupils' capabilities and access to assets are conceptualised in relation to the external environment. HIV/AIDS operates in this external environment as a 'shock' "in terms of both physical and psychological impact" (White & Robinson, 2000: 9-10). The HIV/AIDS impact prompts coping strategies[18] and pathways (Kaag et al., 2004; De Bruijn & Van Dijk, 2003; 2005; De Haan & Zoomers, 2005) that are not compatible with educational equality. Pathways are means of dealing with unstable situations. They are "patterns of livelihood activities that arise from a co-ordination process among actors" (De Haan & Zoomers, 2005: 43). They arise from individuals' strategic behaviour based on experiences rather than visions of the future (De Bruijn & Van Dijk, 2003). In this chapter, I discuss how HIV/AIDS-related strategic behaviour and the ensuing pathways reinforce the persistence of gender inequality.

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[17] Although the definition of concept of 'household' is contentious, in this chapter usage of the term 'household' does not necessarily imply its personification through aggregating resources and decision-making. Rather, it is borne in mind that individual members bargain, negotiate, cooperate and even conflict (Sen, 1990; Agarwal, 1997; Kabeer, 1998; Ssali, 2003). That is, a household is a unit in which different members (each acting individually) are prone to AIDS-induced poverty. The impact of HIV/AIDS however is reflected in the socio-economic status of the entire household measured by access to essential necessities of life (food, shelter, and clothing) and human capital (including knowledge, skills and health) status.

[18] The ability of poor households to have livelihood strategies has been questioned by some scholars (*e.g.* Nooteboom, 2003), who regard livelihood strategies as those livelihood activities that are undertaken after being "strategically planned" (Niehof and Price, 2001). According to Niehof (2004: 323) a strategy refers to *"consciously and coherently structured actions that are aimed at achieving something in the future"*, while coping strategies are those *"medium-term strategies that anticipate a foreseeable crisis or situation of stress in the immediate future"*. Livelihood strategies are therefore consequences of human creation shaped from people's reasoning and everyday meanings that are situated in routine social interaction.

Past research has shown that HIV/AIDS worsens gender inequalities (Ellis, 2000; Muller, 2004). For example, studies show that HIV/AIDS diminishes women's income and statuses, leaving them particularly more vulnerable to HIV infection (Drimie, 2002; Smith, 2002). Although females' relative powerlessness has been linked to their engagement in commercial sex (Smith, 2002), other studies demonstrate that teenagers' involvement in commercial sex is attributable to the need to conform to misconceptions about modernity or 'to prove themselves' (Mirembe & Davies, 2001; Hardon, 2005). Disciplinary power - the kind that is unquestioned for example females' acceptance of gender roles or unequal resource allocation– (De Haan & Zoomers, 2005), and the availability of a 'room for manoeuvre' (Villareal, 1994) both shape livelihood pathways. Power relations therefore shape the gendered nature of household roles and resource allocation. Both the capabilities and livelihoods approaches assume that people are agents rather than victims of change. They actively shape their lives using both material and non-material assets depending on the context (Sen, 1999; Kaag *et al.*, 2004). In the regional parts of Uganda, the social fabric and HIV/AIDS constitute the context. Analysis of how girls' pathways in such a context bring about persistence of gender inequality and increased vulnerability to HIV infection is rare. In other words, what happens when there is need for extra labour, less income for educational needs, increased expenditure, reduced parenthood and enduring gendered power imbalances but education is free in terms of tuition fees?

2.3. The research process and schools in rural Uganda

The study was largely ethnographic by design. Ethnographic research involves prolonged fieldwork in a natural setting (Gaskins *et al.*, 1992). This was a 'thick description' (Geertz, 1973; 1976) in search of shared meanings beyond obvious regularities. Prior to the commencement of fieldwork, written permission was obtained from the relevant authorities. I collected data from one sub-county, selected from Luweero district in central Uganda between June 2004 and June 2005. Fieldwork was undertaken in two Government primary schools (Tulo

and Tumo) and one private (Tuso) school, and their villages[19]. Working as a volunteer teacher/participant observer at the three schools, I watched, listened, and interpreted actions, events and behaviours as they occurred. At each school, I taught a minimum of 36 lessons and observed ten others in a period of at least four months. Participant observation is the "intensive, long-term participation in a field setting" (Erickson. 1986: 121). I observed classroom and school environments, and held ethnographic conversations with male and female pupils and teachers. During the conversations, I sneaked topics of interest to the research into casual discussions to get more awareness of the observed realities. Combining teaching and researching generated useful insights into links between gender differences in school attendance and participation and circumstances within pupils' households in UPE and private schools. School interactions helped me to gain entry into specific AIDS-afflicted and AIDS-affected households. I selected eight households (three from each UPE school village and two from the private school village), where I observed daily routines, including all scheduled and most unscheduled events and activities. Observation data were recorded in form of field notes that were categorised into observational notes (records of what was seen or heard) and analytical notes (inferences from observational notes) (Schatzman, & Strauss, 1973). I also held ethnographic Focus Group Discussions (FGDs) with female and male pupils orphaned and made vulnerable by HIV/AIDS. These were twelve FGDs (four per school: two girls, two boys) with pupils and six with parents/guardians living with HIV/AIDS[20]. Furthermore, two groups (one male, one female) of children who dropped out of UPE schools were carried out. FGDs provide a unique opportunity to collectively interview participants as well as observe them interacting during the discussion (Suter, 2000). All FGD data were audio taped.

Additional data were collected using life history interviews. Within each school village, twelve households (with children in the school) participated in life history interviews. They were selected purposively to include six AIDS-afflicted and six AIDS-affected households. I

[19] All school/village and persons' names used are pseudonyms.
[20] Parents & guardians living with HIV/AIDS were mobilised at the health centre where they usually congregated once a week.

requested willing household members – both male and female –to narrate their life stories in order to come up with a complete case of family history. In collecting life stories, I used Vayda's (1983) approach of progressive contextualisation. I aimed at constructing 'chains' between different events and pathways by asking questions and counter-questions in order to get their causal explanation. For example establishing whether children had lost parents to AIDS was done among other things by eliminating other possible causes of death through empirical scrutiny based on certain proxy indicators[21]. Life stories were particularly useful in revealing how HIV/AIDS had affected household livelihoods and the associated consequences for supporting girls' education. Life history data were recorded in notebooks and on audiocassette tapes. The field notes and interview transcripts were later analysed and interpreted.

2.4. AIDS-Induced poverty and primary education in rural Uganda

I have already noted that HIV/AIDS exacerbates the poverty situation. In light of global advances in the provision of ART, HIV/AIDS impact may no longer be considered threatening to rural household livelihoods. Uganda has a national ART policy that was developed in 2003 and implemented in 2004 (UNAIDS/WHO, 2005b). However, due to challenges of scaling up ART, many clinically eligible people in rural areas do not have access to it. Concerns have been raised about the capacity of existing health infrastructure in sub-Saharan Africa to ensure sustainable distribution and proper use of ART (Kebba, 2003). This is partly because expanded access to ART involves more than just drug distribution. There is need for example to review best practices, establish quality assurance programs, strengthen drug control mechanisms, train, and retain staff (*ibid.*). In addition, even if antiretroviral drugs were to be made freely accessible to all, the fact that people may need to take them after meals could be quite problematic in food-insecure households (see Loevinsohn and Gillespie, 2003). A recent study in Uganda reported that some 100 patients who were

[21] Proxy indicators used to determine AIDS-related illness or death included prolonged illness, death of a spouse(s), and other symptoms such as medical diagnosis of TB and herpes zoster.

receiving ART from on organisations were threatening to stop taking their drugs due to increased food needs (See Hardon *et al.*, 2006: 296). The implication is that ART non-adherence and treatment interruptions are inevitable given the prevailing circumstances particularly in rural Uganda. Uganda's national adherence to ART has been put at about 90% (Nakiyemba *et al.*, undated). Yet, at least a 95% adherence is required in order for ART to have effective therapeutic value (Paterson *et al.*, 1999). Hence, the impact of HIV/AIDS continues to be obvious in such areas. In the study area, the decisions, behaviours and actions of individuals in response to the impact of HIV/AIDS were analysed as fuelling the persistence of gender inequalities in UPE.

The findings show that AIDS-induced poverty largely undermined household investment in children's schooling. Analysis of life stories and conversations reveals that HIV/AIDS-induced poverty in several ways. For example, households with persons living with HIV/AIDS (PLHA) sometimes had to cope with regular episodes of illnesses. This increased expenditure on medical costs and special dietary needs. Most households in the study area depended on crop cultivation for food and income earning. Female household members usually undertook food production and preparation tasks for the benefit of the entire household. Many AIDS-afflicted households suffered income and food insecurity due to reduced labour since extra time was spent on care giving activities including taking patients to the health centre. HIV-positive UPE parents gave the following explanations about the link between HIV/AIDS, poverty, and schooling:

> *"These days God brought us this problem of AIDS. AIDS makes one weak and they fail to work. A person can spend most of the time sleeping because they are ill. Even if a man has a wife, the wife too may be equally weak. When a person is not strong enough to work everyday, they cannot afford essential necessities of life. The result is lack of enough food in the house. For example in this house, there is no soap, no salt and no food. In such a situation, the child may fail to get the school requirements. This can make a child fail to go to school to help the sick parents. My children are in school but I no longer have the energy to work for them. Their mother died two years ago and she left them with me. I find it very*

difficult to work for them. I very much want the children to go to school but I don't have the energy to work and maintain them in school."[22]

"My husband died in 1998. I face many problems in trying to maintain the home. You know we depend on growing crops, but when I work hard, at times I fall sick. This affects my crops because they lack enough care and I end up getting a poor harvest. The school usually asks for money for building. The children need exercise books and pens. It may appear to be little money but to a sick person like me raising such an amount is a big problem."[23]

PLHAs in the study area accessed free treatment for opportunistic infections but not antiretroviral drugs. The situation of AIDS-induced poverty was more characteristic of UPE school parents/guardians compared with their counterparts in the private school. UPE households had more livelihood related demands than private school households. Analysis revealed that whereas private school parents and guardians were the 'wealthier', more educated, small-scale traders, and salary earners (*e.g.* as teachers, health workers, receptionists), UPE parents and guardians were the 'poorer', less educated peasants who depended entirely on subsistence agriculture. For example among the 42 PHLAs that participated in FGDs, only four (two teachers, one grocery proprietor and one retired soldier/small-scale trader) had children at the private school. The level of AIDS-affliction among the six private school households that participated in life history interviews was minor compared with that among UPE households. This might suggest that UPE household livelihoods were more vulnerable to HIV/AIDS impact than those of the private school. The private school parents could perhaps afford transport and other costs[24] involved in seeking/accessing ART and were thus more economically productive. It has been

[22] HIV-positive male parent.
[23] HIV-positive female parent.
[24] The study was conducted in a rural setting with a health centre where the only HIV/AIDS services provided were Voluntary Testing and Counselling (VCT). PHLAs needed 2000 Uganda Shillings (about US $ 1.10) to go the district hospital or health sub-district where their clinical eligibility to ART could be assessed.

documented that patients with higher incomes are more likely to adhere to ART (Pratt *et al.*, 1998; Martinez *et al.*, 1998). This is particularly true in developing countries like Uganda, where medical insurance for people living with HIV is highly restricted (Katabira, 2002).

The problems raised by pupils also varied by type of school ownership. For example in response to probes about their problems, private school pupils usually complained about lack of school bags and sports shoes but these issues were never raised by UPE pupils. Most UPE pupils used plastic bags (usually provided free by shops) to carry their books and very few had shoes. They instead complained about lack of exercise books, pens, snacks/lunch and corporal punishment. Such differences in pupils' problems may be attributable to variations in their socio-economic status and effect of HIV/AIDS. In Uganda, primary education is still highly dependent on household funding (Deininger, 2003). The parents of the study schools were required to provide necessities including exercise books, pens, pencils, meals and clothing. The findings revealed that in AIDS-afflicted households, medical expenses were inevitable and educational needs such as learning materials and lunch usually ceased to be a priority. Additionally, some households were overwhelmed by AIDS orphanhood supporting up to five orphans. A comparison between private and primary school situations shows that AIDS orphanhood was less pronounced in the private school. The AIDS-affected households had numerous livelihood demands and could not afford to send children to the private school. I interpreted sending children to the private school as an indicator of higher socio-economic status and less AIDS affliction. It was noted during school observations that at least 50% of UPE pupils did not have basic learning materials (books and pens), which was not the case in the private school. UPE school teachers often expressed the problem of children coming to school without basic materials as illustrated in the following excerpts:

> *"… for example in my P.5 class, there are some pupils who come to school from Monday to Friday without pens or exercise books. When I try to ask, they tell me there is no money at home. Others just keep quiet and don't even bother to explain. But I think girls usually miss school due to two*

> *major reasons; lack of materials and the demand for their labour in the household."*[25]

> *"Lack of learning materials is one of the most common explanations for missing school. Yet a pen costs only 100 Uganda Shillings [US $0.18]. The people are poor."*[26]

The children constantly mentioned lack of learning materials as a cause of non-attendance. They claimed that teachers sometimes expelled them from lessons if they had no exercise books. Some teachers even punished children for not having exercise books or pens as revealed in the following typical complaint:

> *"Some of us have many problems. When a book is finished and I ask for another one, my mother tells me she has no money. If I come to school without a book, I get into trouble. It depends on the moods of the teacher. The other day he punched me because I was waiting for a friend to finish writing in order to borrow her pen. Therefore, to avoid heavy punishment, I stay at home…"*[27]

I have so far argued that AIDS affliction in terms of illness and even death may reduce household labour, income and food security but increase household expenditure. The picture of reality drawn from the study villages is concurrent with that painted by the 2004 World Health Report which shows that Uganda's dependency ratio[28] rose from 105:100 in 1992 to 111:100 in 2002 due to AIDS (WHO, 2004; Barnett, 2004a). UPE households seemed to be more afflicted by HIV/AIDS than those that sent children to the private school. UPE households therefore appeared to suffer more AIDS-induced poverty as manifested in pupils' complaints. I have also argued that most households that absorbed AIDS orphans could not afford to send children to the private school but instead sent them to UPE schools. This partly explains why lack

[25] Male teacher, conversation.
[26] Female teacher, conversation.
[27] Female orphan.
[28] Dependency Ratio is the number of dependants per 100 adults of productive age 15-64 years old).

of learning materials and lunch among others were raised as causes of non-attendance in UPE schools and rarely so in the private school. The above observations might suggest that reducing expenditure on education is among the means of coping with AIDS affliction in the study villages. Others were the involvement of children in agricultural tasks and in income earning. At the individual level, pupils responded by refusing to attend school in order to avoid punishment for example and seeking alternative income-earning mechanisms as I explain later. The above discussion highlights the effect of HIV/AIDS on exacerbating the poverty situation in the study area. In the following section of this contribution, I elaborate on how the impact of HIV/AIDS on rural household livelihoods translates into gender inequality in primary education.

2.5. Livelihood pathways, gender equality and inequality

I have hinted that gender inequality is perceived in terms of capability denial or unequal treatment and opportunity. Many PLHAs were members of the post-test club[29] that met every Wednesday at the health centre. Some girls in such households did not attend school because they had to house-sit on such days. In the study villages, more girls than boys were required to dig before they went to school in the morning or to skip school whenever there were emergencies. Girls' involvement in agricultural tasks before school as an aspect of yielding to disciplinary power meant that they got more fatigued than boys, but undertook the same activities at school. The following are typical excerpts about gendered household roles.

> *"As a girl it is difficult to just wake up and run to school. You can't leave the house dirty or leave your mother without water. Boys don't think about such matters because nobody is bothered about their behaviour. When they wake up, they can decide to just dress and run to school. Even when told to work, it is not obligatory. My mother told me that I should*

[29] A post-test club is a social support group of people who have taken the HIV test. Its goals include preventing further spread of HIV and eradicating stigma and discrimination.

> *not compare myself with my brothers because in future their wives will take care of them. Girls must be obedient otherwise at home people will say you have 'emputu' [state of being naughty]."*[30]

> *"Sometimes I wake up at 6.00 to do household work and leave everything in order. I reach here [school] tired because I come running otherwise I get late. When I go back home from school they welcome me with work! They say, "You have been resting the whole day and now it's our chance to rest."*[31]

Classroom observations revealed that upper primary (classes 5-7) girls were less active in oral questioning and answering than boys in UPE schools. In lower classes (1-4), there were no noticeable gender differences in classroom participation. I interpreted the extra fatigue suffered by girls in AIDS-afflicted households as contributing to their poor classroom participation. The gendered nature of household division of labour in patriarchal settings like Uganda is not new. However, AIDS affliction has multiplied the gendered roles thereby exacerbating inequalities. Although girls have always undertaken domestic chores that subjected them to tardiness and absenteeism more than boys, the multiplicity of household tasks by HIV/AIDS makes the situation even worse. Such differences were less noticeable in the private school perhaps due to reduced dependency on crop cultivation and less AIDS affliction.

Apart from broadening the gendered nature of household tasks, there was unequal access to income. Due to AIDS-induced poverty, children were compelled to fend for themselves in terms of mobilising personal and school requirements. Analysis of study findings reveals that society and household structures gave girls fewer 'acceptable'[32] opportunities to earn income for educational needs than boys.

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[30] Girl orphan Conversation Tulo.
[31] Girl orphan conversation, Tumo.
[32] By more 'acceptable' I mean less harmful/safer opportunities for income earning such as provision of casual labour as opposed to engaging in sexual relationships. This is not to ignore the fact that child labour is indeed unacceptable especially to ILO and in child rights activism but to emphasize that it is less harmful/safer than 'child prostitution'.

> *"Let us not forget that a girl is a girl. If I allow my daughter to go and dig in somebody's garden for money, who will take over her responsibilities in this home? You know there is too much work. I need some help and as a girl this is her chance to practice what she will do in her own house in future. Secondly, you know very well that some men these days behave like wild animals. Somebody's child can go to work in widower's garden and when she tries to demand for her pay, she is raped, seduced into a sexual relationship, or simply not paid because there is nothing she can do. That is why many parents are reluctant to allow their girls to go and work."*[33]

Atekyereza (2001) also found out that boys worked to earn money for educational needs but girls were compelled to marry instead. In this study, such differences were most obvious in households with children in UPE schools unlike their counterparts with children in the private school. Girls' income-earning options were restricted and their pathways included taking money and gifts from older men. Some UPE schoolgirls (especially in upper primary) were involved in sexual relationships with *'boda-boda'*[34] cyclists on their way to school. This seemed to be done out of desperation rather than mere naughtiness. Hardon (2005) shows that involvement in teenage sex was regarded by adolescents as a sign of modernity or 'cool behaviour' in Masaka in Uganda where money and other gifts were exchanged and a comprehensive school-based AIDS education programme had failed. However, in this research, the need to appear 'cool' did not come up. Rather, it was often reported that older girls mainly engaged in sexual relations for economic gains. Implementation of AIDS and sex education programs in schools assumes the existence of equality of power and autonomy (Mirembe & Davies, 2001; Hardon, 2005). Such programs are best suited in more egalitarian and developed societies

[33] Conversation, female parent.

[34] Boda-boda is a term derived from the English equivalent of border-border, which is a transport service initially used to cross the Kenya-Uganda border. Nowadays, boda-boda refers to a taxi service provided on a bicycle usually equipped with a padded cushion fitted at the rear carrier (See Howe & Davis, 2002). In many areas of Uganda, the motorbike is increasingly replacing the bicycle.

where people have more and better alternatives to such livelihood stress. This is not the case in the research area. There is a gender biased division of labour in which females (including school pupils) undertook more productive and reproductive roles[35] for the benefit of the entire household, and males (including school pupils) participated in income earning mostly for satisfaction of individual needs. However, a closer look also shows that some girls had devised their own coping strategy – sexual relations with older men in the village. Such girls yielded to subordination not only in terms of the heavy workload but also unequal access to financial capital. This is consistent with De Haan & Zoomers' (2005) argument that females are not pure victims of subordination but play an active role in the creation of power relations through 'wielding and yielding' (Villareal, 1994). The availability of boda-boda riders provided a room for manoeuvre that facilitated sexual exchange as a pathway. Girls' income-earning mechanism implies that they are highly vulnerable to HIV infection. Private school girls were less vulnerable to HIV infection than UPE school girls perhaps because they had less need to engage in sex for economic reasons. This study shows that access to HIV/AIDS information alone may not necessarily help to change individuals' behaviour since circumstances beyond their control influence decisions to engage in commercial sex. This study also adds that females' vulnerability to HIV infection is exacerbated by inadequate household investment in UPE, which itself is undermined by HIV/AIDS impact on rural livelihoods.

2.6. HIV/AIDS and the gender inequality in a vicious cycle

The findings revealed gender differences in classroom participation, access to school materials and school attendance due to AIDS-induced orphanhood. HIV/AIDS negatively affects household assets, particularly labour and income due to increased illness, expenditure and orphanhood. In the study area, many households had been either affected or afflicted (or both) by HIV/AIDS. However, the magnitude of affliction was different. The least affected households could afford

[35] For a detailed discussion of productive and reproductive roles, see Mosar's (1993) explanation of women's triple role.

to send children to the private school and the rest took advantage of 'free' UPE schools. Many children from AIDS-afflicted and affected households had poor access to learning materials and lunch. There were gender differences in children's access to money for educational needs. Boys had relatively safer means of accessing income through provision of their labour whereas girls' opportunities were usually restricted. Consequently, some girls coped by engaging in sexual relationships. For that reason, the most common cause of school dropout among girls was pregnancy. Atekyereza (2001) noted that in the year 1998, 60 girls in Luweero district dropped out of school due to pregnancy. We therefore have a society not only characterised by the gender inequality in education but also greater females' vulnerability to HIV infection.

Females' vulnerability to HIV/AIDS has been documented (*e.g.* Smith, 2002) citing lack of information, education and skills related to HIV/AIDS (Whelan, 1999) among the causes. Lack of information among pupils should be isolated from the causes in Uganda because AIDS and sex education programs are common place in schools. Cohen & Tate (2005) document the recent removal of some information from the HIV/AIDS curricula on the grounds that pupils received 'too much' or unnecessary awareness. This information is given through a program called the Presidential Initiative on AIDS Strategy for Communication to the Youth (PIASCY)[36]. Schools are not always the most highly effective agents for AIDS and sex education campaigns in light of sexual violence therein (Mirembe & Davies, 2001; Leach *et al.*, 2003, Dunne *et al.* 2003). Additionally, influence of the social organisation on individuals' responses to HIV/AIDS somehow makes verbal campaigns against HIV/AIDS ironical. However, education is undoubtedly one of the most fundamental tools that can ever be used to alleviate the social and economic bases for females' vulnerability to HIV infection because it can enhance poverty reduction, gender equality, and women's autonomy (World Bank, 2002a). In addition, narrowing the gender inequalities in education could eventually expand females 'room for manoeuvre', diversify their pathways, improve their livelihoods and reduce their vulnerability to HIV infection. Interventions aimed at

[36] See Annex V.

mitigating the impact of HIV/AIDS on rural livelihoods will in effect also reduce gender inequalities in education in such areas. This implies that HIV/AIDS and gender inequalities in UPE are in a vicious cycle illustrated in Figure 2.1.

The cycle is part of a larger cycle as explained by World Bank (2002a). It illustrates the relationship between HIV/AIDS and education at the national level. That is, when HIV prevalence increases, teacher deaths increase, teaching quality declines, and orphans and out of school

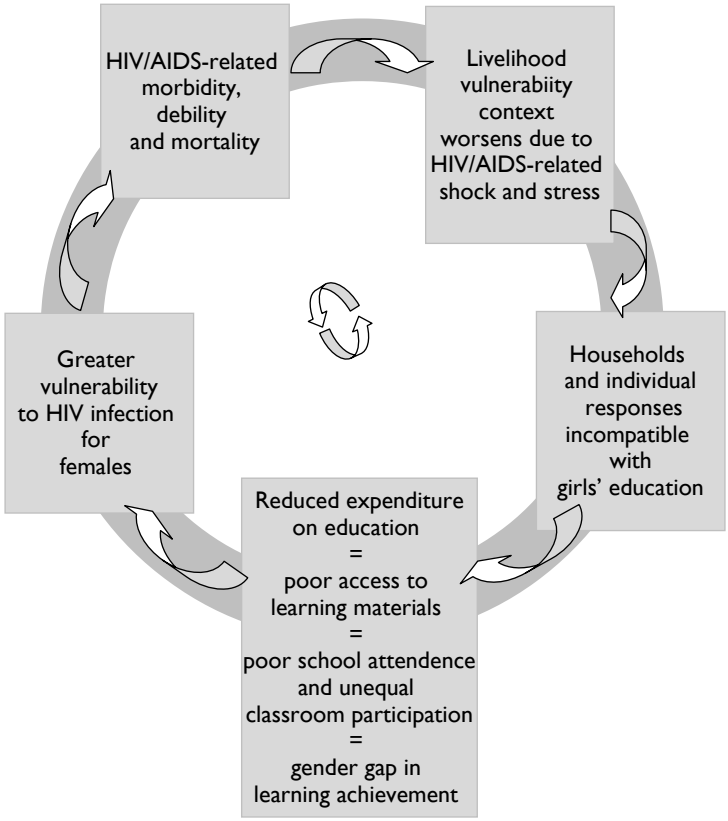

Figure 2.1. The vicious cycle of HIV/AIDS and gender inequality in rural Uganda. Source: Based on World Bank (2002a: 10) Figure 1-3: HIV and education: The consequences of inaction (Reconstructed by the author).

youth increase. This in turn increases illiteracy, shrinks the work force and the quality of human capital. The country's ability to compete in knowledge declines, leading to poor economic growth and hence health and education budget constraints manifest. This increases HIV prevalence and the cycle continues (see World Bank, 2000a: 10).

The vicious cycle of HIV/AIDS and the gender inequality illustrated in Figure 2.1 largely operates at the household level and its impact is noticeable within schools and communities. An amalgamation of micro-level cycles forms a larger cycle whose impact can be visible at the national level. A synthesis of the study findings shows a vicious cycle of HIV/AIDS and gender inequality in education emanating from the interface between HIV/AIDS and rural livelihoods. HIV/AIDS-related morbidity and mortality increase livelihood vulnerability and worsen power relations. These relations are aspects of the social organisation that shapes individuals' responses to HIV/AIDS. In areas where females take pre-eminence in care giving, food preparation and production, and childbearing and rearing, there is a gender-biased household division of labour, resource allocation and limited options for income earning. In the era of HIV/AIDS, the adversity of gender inequality in UPE persists despite parity in enrolment. This illustrates why the gender inequalities in education are a characteristic of sub-Saharan Africa (Deininger, 2000; Stephens 2000). In Uganda, the feminist movement has sought to eradicate the gender biases without much success because of the unchanged institutional and cultural factors. Hence,

> *"…it is not until we culturally evolve from historical customary practices that uphold male domination that we can fundamentally and effectively influence policy aimed at empowering women…"* (Mbire-Barungi, 1999: 439)

Nevertheless, the existence of structural and cultural barriers amidst the HIV/AIDS impact does not necessarily imply that nothing can be done to break the above vicious cycle or to achieve gender equality in UPE. HIV/AIDS education messages in the study area seem to be ignored by girls in upper primary perhaps because decision-making is based on individuals' experiences. AIDS-induced poverty and AIDS orphanhood intensify the deprivation of UPE girls' capabilities to attend school, arrive in time, and participate meaningfully. More pragmatic

measures to mitigate the impact of HIV/AIDS on rural household livelihoods should be devised and implemented.

Although the world applauded Uganda for the dramatic decline in HIV sero prevalence, there has not yet been a corresponding reduction in the impact of HIV/AIDS on the population. Only 10,600 out of 114,000 clinically eligible patients are currently accessing free ART from the Ministry of Health (UNAIDS/WHO, 2005b). Breaking the vicious cycle of HIV/AIDS and gender inequality would require further mitigation of the HIV/AIDS impact preferably through achieving a more comprehensive access and adherence to ART as a first step. ART could help to restore PLHAs agricultural productivity and livelihood security. Additionally, education-specific measures such as free lunch and learning materials for all pupils would be beneficial. However, it should be noted that the findings presented in this chapter arise from an in-depth study conducted in one sub-county. Further research is required to establish other culturally acceptable AIDS mitigation measures that are likely to have practicable consequences on the achievement of gender equality in primary education in the context of HIV/AIDS. More importantly, measures to avert the effect of social patterns of educational inequality are highly desirable.

2.7. Concluding remarks

Gender inequalities in Uganda's education have existed since time immemorial. The Government of Uganda has put in place measures to eradicate gender imbalances in education but so far has only succeeded in reducing disparities. The broad objective of this research was to understand the persistence of gender inequalities in UPE in the context of HIV/AIDS. Rural household members were compelled to cope with the various effects of HIV/AIDS such as increased expenditure on medical care, loss of labour due to AIDS-related morbidity, debility, and mortality and ever increasing numbers of orphans. They adopted pathways that had negative consequences on pupils' freedoms to attend school, learn and participate safely and meaningfully. These pathways included increasing pupils' household tasks, involving pupils in income earning and reducing expenditure on education leading to a lack of learning materials, irregular attendance and poor classroom participation. Whereas boys had options of earning income, girls'

options seemed to be limited to getting involved in sexual relationships. Despite government efforts to eradicate gender inequalities in UPE and to reduce HIV prevalence, the inequality of power relations embedded in the rural social structure remains untouched. Wider social inequality therefore blends intricately with HIV/AIDS to diminish girls' capabilities to access financial resources and time required for equal educational achievement. Gender differences were more pronounced in UPE schools than the private school. I attributed this to the inability of AIDS-afflicted households to send children to private schools. Research findings therefore suggest that the socio-economic impact of HIV/AIDS on rural livelihoods and gendered power imbalances exacerbate the current gender inequalities in rural Uganda. There is a vicious cycle of HIV/AIDS and gender inequality that could possibly be broken by mitigating HIV/AIDS impact and working towards achievement of more balanced power relations. The research shows that HIV/AIDS does not cause gender inequalities but contributes to their persistence. Even if HIV/AIDS and its effects were to be eradicated, the inequalities would perhaps persist but at least they would not be reinforced, implying that the magnitude would decrease. This would thus trigger off the highly desired fundamental improvement. Therefore, expanding access and adherence to ART for PHLAs, lunch and learning materials required by UPE pupils at school could be useful. However, further research on people's perceptions and opinions on how to strengthen such suggested interventions is required because structural constraints persist.

Chapter 3
Teacher competence and gender equality in the context of HIV/AIDS[37]

Doris M. Kakuru, Martin Mulder and Arjen Wals

Abstract

The achievement of gender equality is among the objectives of Uganda's Universal Primary Education program (UPE) that are yet to be realised. This research was carried out to understand the persistence of gender inequality in UPE in the context of HIV/AIDS. A key question addressed in this chapter is: Do primary school teachers have the necessary competencies to promote gender equality in the rural context of HIV/AIDS in Uganda? We conclude that there is a need to enhance teachers' competencies that are identified on the basis of this study. Enhancing and developing relevant teacher competencies could accelerate the achievement of gender equality in UPE and eventually re-shape the wider landscape within which HIV/AIDS operates.

Keywords: primary education, teacher competence, gender equality, rural livelihoods, HIV/AIDS, Uganda

3.1. Introduction

Universal Primary Education (UPE) and gender equality are the focus of two of the eight Millennium Development Goals (MDGs) to be achieved by 2015. In Uganda, the achievement of gender equality is among the key objectives of UPE, reflected in the strategic objectives of Ministry of Education and Sports (MoES). A number of interventions have been put in place to specifically address gender inequalities

[37] A modified version of this chapter is currently under review by the *International Journal of Educational Development* as Kakuru, D.M., Mulder, M., Wals, A. Teacher competence and gender equality in the context of HIV/AIDS.

in primary education in Uganda. For example, the Equity in the Classroom (EIC) programme aims at facilitating gender equality in classroom participation through sensitising teachers. In addition, the number of classrooms has increased from 25,676 in 1996 to 78,403 in 2005 (Bitamazire, 2005), and trained teachers increased from 81,564 in 1996 to 125,883 in 2004 (MoES, 2004). The Teacher Development and Management System (TDMS) has been strengthened to enhance professional teacher development. Consequently, gender disparities in enrolment have almost disappeared (MoES, 2004) but there is evidence that inequalities in school attendance, participation, retention and achievement persist (see Amanda & Amanda, 2000; Kakuru, 2003; Kasente, 2003; Kwesiga, 2003; Okuni, 2003).

Research was conducted to understand how rural people's responses to the impact of HIV/AIDS on their livelihoods influence the persistence of gender inequalities in UPE. This chapter addresses the adequacy of teacher competence to promote gender equality in the context of HIV/AIDS. HIV/AIDS has been portrayed as a major challenge to the achievement of the MDGs (Whiteside, 2003; Barnett, 2004b). Some studies have documented the possible corrosive impact of HIV/AIDS on the capacity of education sectors to execute their primary tasks (Baylies, 2002; Evans, 2002; Smith, 2002; World Bank, 2002a; Cohen, 2004). Teachers have also been affected in various ways. Most of the previous studies about the impact of HIV/AIDS on teachers looked at the effects on teacher morbidity, absenteeism, mortality and attrition rates (*e.g.* Kelly, 2000a; Bennell *et al.*, 2002; Boler, 2003; Amone & Bukuluki, 2004a; Delamonica *et al.*, 2004; Bennell, 2005; Caillods, 2005). There is a seemingly growing impact of HIV/AIDS on education with respect to demand, supply, quality and equality. A large body of literature exists on various strategies for mainstreaming HIV/AIDS education in sub-Saharan Africa for curtailing HIV transmission (Cohen, 2004; Kelly, 2004; Rugalema & Khanye, 2004). No adequate empirical attention has been given to the interaction between HIV/AIDS and the consequences for teacher competence to promote gender equality. The questions addressed in this chapter are: What are the competences required by primary school teachers in order to promote gender equality in the rural context of HIV/AIDS in Uganda? Do teachers have these competencies? How can the competencies be developed? Using qualitative research findings, we highlight the

need to identify and develop competencies for teachers in a context of unequal power relations coupled with the huge socio-economic impact of HIV/AIDS.

3.2. Competence and the context of HIV/AIDS as a scene on teachers' landscapes

The theoretical framework for the study is underpinned by the context 'embeddedness' of competence and teachers' professional knowledge landscapes. The concept of competence has a long history that can be traced back to the 1860's (Biemans *et al.*, 2004). Competence frameworks, conceptions and definitions vary from country to country, organisation to organisation, and profession to profession. Le Deist & Winterton (2005) have identified major traditions of competence as behaviourist (characteristic of the United States), functional (UK approach) and holistic (France, Germany, Austria, the Netherlands). The rise to fame of competence-based education has been due to the belief in the possibility to bridge the education-work divide and personal development (Biemans *et al.*, 2004). Definitions of competence have ranged from the overly broad to the overly precise. According to Eraut (1994: 168), "competence can mean anything between 'ready-to-start' work-based learning, to being highly reliable and proficient". Dreyfus & Dreyfus (1986) explain how competence development takes place in a continuum from novice to expert with competence positioned somewhere in between. That is, competence includes coping with crowdedness, seeing actions at least partially in terms of longer-term goals, conscious deliberate planning, standardised and routinised procedures. Within the competence movement, there is a growing popularity of the notion of competence as integrated capabilities (Biemans *et al.*, 2004). For example, competence has been defined as 'the capability of a person or an organisation to reach specific achievements' (Mulder, 2001: 152). In relation to teaching, competence means "demonstrating the necessary pedagogical skills and abilities in the school context" (Cheng & Cheung 2004: 190). Teachers therefore need certain core competencies that are congruent with the teaching profession. A core competence includes complementary skills and knowledge bases that result in an individual or group's ability to execute processes to a world-class standard (Coyne *et al.*, 1997). In the discussion of competence pitfalls, Biemans *et al.* (2004: 8) caution

against over-standardisation at the expense of 'context independence'. That is, professional competencies should be flexible enough to fit in the specific contexts within which they are applied.

O'Sullivan's (2006) study on class sizes in Uganda was framed in the context of teaching in developing countries. It provides important insights about classroom practices, teaching large classes and effective strategies for teachers but is silent on the challenges of HIV/AIDS and unequal gender relations. Harley *et al.*, (2000) focussed on how policy and practice framed in the social context influenced teachers' roles and competencies in South Africa and highlighted the conflict between gender values and policy. In this chapter, various factors within the community and school contexts are perceived as affecting teacher competencies. Building on Clandinin & Connelly's (1995, 1996) metaphor of professional knowledge landscape, contexts of teaching are conceptualized as multiple scenes on a landscape. The school environment encompasses individuals' livelihoods in the context of the HIV/AIDS impact and unequal power relations. The school is at the intersection where the impact of HIV/AIDS on individuals meets and translates into gender inequalities. A good teacher is the product of an interaction of various factors including the environment, competence and behaviour (Korthagen, 2004). Hence, teaching should be understood in the context of the complex environment where it takes place (Connelly *et al.*, 1997). HIV/AIDS impact is perceived as part of the multiple scenes that shape teachers' competencies to promote gender equality. Gender equality includes parity in enrolment as well as learning achievement, performance, opportunities, and classroom practices (Ahmed & Chowdhury, 2005). This includes equality in school attendance, learning and participation in safety and security, development of identities that tolerate others, and enjoyment of general economic, political and cultural opportunities (Aikman & Unterhalter, 2005: 3). Teacher behaviour and attitudes influence equality of educational outcomes (*ibid.*). In addition, gender equality or inequality is influenced by the power relations, which are created and recreated in the process of social interaction (Rees & Garnsey, 2003).

3.3. Research in rural primary schools: design and methods

The research was designed as an ethnographic study conducted in three rural schools and their villages in Luweero district, central Uganda. These were two government primary schools (Tumo and Tulo)[38] and one private school (Tuso). The data reported in this contribution were gathered using multiple methods including participant observation, ethnographic conversations, ethnographic Focus Group Discussions (FGDs), and life histories as described in Chapter 1 (section 1.7). School observations helped in the identification and analysis of specific areas in which teacher competencies could be enhanced or developed in light of the needs of pupils orphaned or made vulnerable by HIV/AIDS. Household observations enriched understanding of how livelihood and social experiences affected schooling, particularly that of girls. At least five teachers at each school participated in ethnographic conversations, which provided data about pupils' needs and teacher competencies in the era of HIV/AIDS. FGD sessions were a source of views about home and school-related problems, and teachers' responses to these problems. Life stories were particularly useful in revealing how HIV/AIDS had affected household livelihoods and girls' education in particular. Interpretations developed from life stories were integrated with those from observations, conversations and discussions. These provided adequate background knowledge for analysing and identifying the necessary teacher competencies discussed in this chapter. The findings are presented in the following three sub-sections. We begin with an explanation of the nature of interaction between school processes and rural livelihoods. We then give a picture of what it means to teach in a rural context of HIV/AIDS, followed by that of studying in the same context. The results are followed by a discussion of identified competences and suggestions on competence development in separate sections.

[38] All names of persons and places used in the text are pseudonyms.

3.4. Rural livelihood: School and household interaction

The research revealed that pupils' livelihoods intervened with school procedures and demands. Teachers' responses to the interaction between school and household aspects undermined the achievement gender equality in UPE. Tulo primary school was the biggest of the three schools that participated in the study. It had a pupil population of 756 (392 female and 364 male) and 17 teachers (nine female and seven male) plus a female head teacher. Pupils were provided with maize porridge for lunch and the school was equipped with a large water tank. However, classrooms were crowded with pupils and furniture. Four to five pupils shared desks placed very closely together. All pupils were expected at school at 08:00h. Pupils of class one (P.1) and class two (P.2) went back home at 13:00h. Classes three to six (P3-P6) went back at 16:00h and class seven (P.7) stayed until 18:30h in preparation for the national Primary Leaving Examination (PLE). All classes were divided into two groups (A & B). Many children missed school at Tulo or arrived late because they had to participate in livelihood agricultural tasks and collecting water. Teachers' responses to pupils' tardiness and irregular attendance show lack of adequate knowledge about the effect of livelihood demands on school participation as we show later.

Tumo primary school was the opposite of Tulo. It was quite a small school with a population of approximately 250 pupils and seven teachers (three female, four male) plus a male head teacher. Due to preparations for PLE, P.7 pupils arrived at school at 07:30h instead of 08:00h, and left at 20:00h instead of 16:00h. Pupils took a break at 10:30h and a lunch break at 13:00h. Lunchtime was largely for playing rather than eating. Only a handful of children (usually about 10 out of 250 pupils), who could afford to pay 2000 Uganda Shillings (US $1.10) per term, for lunch were provided with maize porridge. In this final term, P.7 pupils were required to bring food items to school and prepare their own meal, which they ate at 17:00h. Upon arrival at home, some pupils went to the garden or banana plantation to collect matoke (green bananas), cassava, or potatoes to take to school the next day. Most children who lived with their biological parents were at an advantage because their mothers usually organised food for them to take to school. Others chose between going to look for food late in the evening or early

in the morning. Although this was difficult for both boys and girls, boys did not consider time or darkness to be a problem experienced in the process but rather the fact that they had to participate in food preparation at school. Girls, on the other hand seemed to fear the dark to such an extent that they preferred to go early in the morning to look for food in addition to undertaking other routine tasks in light of the gender-biased household division of labour. Some few pupils had no food to take to school but usually received from their friends. The pupils spent most of their time at school but required resources from their households not only to survive but also to learn. This is because the situation in their homes influenced their own actions and behaviour as well as those of teachers. Teacher enforcement of the rules and regulations to ensure their pupils' academic excellence conflicted with the realities of the pupils' livelihoods that might have contributed to persistence of gender inequalities.

Tuso primary school was quite a big school with a pupil population of 460 (340 female and 120 male). There were thirteen teachers (seven female and six male) and a male head teacher. The school quality was also not good. Classrooms were overcrowded, had no shutters, had dusty floors and there were no text books for pupils. However, lunch was provided for everyone. Fewer pupils missed school due to unavoidable circumstances such as illness. The pupils of Tuso came from less poor households, which depended less on crop cultivation than those of UPE schools. The households were also less afflicted by HIV/AIDS and the school had fewer orphans. Indeed, problems of pupils at Tuso were quite different to those of UPE schools. Pupils expressed needs like shoes and school bags and had fewer complaints about teachers compared with those in UPE schools. This might suggest that pupils in the private school had less livelihood-related issues and therefore less conflict with teachers.

3.5. Rural primary school teachers

In order to explain the teachers' world view, we construct composite portraits (Polakow, 1992) of UPE teachers (one female and one male) to illustrate key issues about teacher competence in the context of HIV/AIDS. The portraits are constructed out of the field notes, interview transcripts and conversations. The quotations are therefore

not fictional but genuine. The idea is to present thick descriptions of knowledge acquired out of lived experiences and interaction with teachers. The sketches neither describe all teachers nor a single teacher in particular. They help to compromise between diversities and commonalities between teachers but at the expense of both (Wals, 1994). It should be noted that the realities described here are only those relevant for this contribution. The use of composite portraits is extremely helpful in describing interpersonal and contextual situations to ensure anonymity by detaching acts or situations from particular individuals (Zeni, 1998; Van Maanen, 1988; Hill, 2001).The teachers described below are representations of what was observed in both UPE schools.

3.5.1. Teacher Annet – 'Seen from a distance'

"Abakyaala tubalabba bulabbi, ffe tebatusomessa!" ("We only see female teachers from a distance, they do not teach us!"). Upper primary girls gave this response when asked about the influence of the sex of the teacher on their classroom behaviour. Annet was a middle-aged married woman with two children. She taught all the 10 subjects in her class. When Annet was asked about the general problems faced by the school, she was more interested in explaining teachers' problems.

> Question: *"What do you consider to be the major problems of the school?"*
>
> Annet: *"The classes are really overcrowded. As teachers, we face many problems. There is a problem of feeding. The school has no plan for teachers' feeding. We are provided neither with tea nor lunch. Can you imagine that? Teachers are required to teach all subjects. The school has seven teachers for seven classes. We are really overworked and we are expected to teach without getting lunch like teachers in other schools. The school has no money for that you know."*
>
> Question: *"And how do other schools manage?"*
>
> Annet: *"At Tulo Primary school for example, they [the school] got a kind of grant of 100 bags of maize flour from one of the politicians in the district. It has been helpful the whole term, but we were not that lucky."*

Question: *"Why can't the parents of this school be asked to help?"*

Annet: *"We tried to bring it to the attention of parents in one of the meetings, but they only laughed at us. You see, the people are poor; and they also think that we are okay because we earn salaries at the end of the month, you know? Their children have nothing to eat, how can they even begin to contribute money to feed teachers? The money the school gets from the ministry is very little. But we discussed and resolved that perhaps we should have a school garden from which to get food for lunch. I wonder when such an idea will be implemented. We also earn very low salaries. Sometimes we contribute money for lunch but with the little salary we earn, that is only possible in the first two weeks."*

Question: *How about the pupils, I understand they also have no lunch?*

Annet: *Yes, but let me first tell you more about teachers' problems. And sickness is also a problem."*

Question: *"Oh really, how?"*

Annet: *"For example if there is a sick person at home or a relative, we are always expected to have money because we earn a salary at the end of the month. Neighbours and relatives expect us to help them all the time. But sometimes I cannot even afford to fulfil my own needs. This is a big problem. We also have no houses and we come from far every day."*

The above is a typical example of conversations with teachers on the topic of 'problems'. Pupils were always complaining about their teachers' poor understanding of their problems as highlighted in the following typical extract:

"The problem we have here is that some teachers do not listen to us. In case you have no exercise book and you tell them that your exercise book got finished and even show the last pages in the book, still they beat you for not having a book. They can even see that your book has just got finished that very day and you have nowhere else to get the book other than home

but still they beat you. And at times, you can even fail to get a book from home because there is no money. Teachers don't listen to children's explanations. Some of them hit us. They begin beating you using a stick, after sometime they abandon the stick and start punching you. And if they tell you to lie down and you delay, they 'box' you. Just because you have no book. Some of us have no parents and getting even one book is a real struggle…"[39]

The above quote from one of the girls shows that some pupils were not happy with some of the teachers. Annet however thought teachers generally understood pupils' problems.

Question: *"Do pupils also have problems or do you have any problems with pupils?"*

Annet: *"Yes, some children are unruly. You must have noticed that yourself. In addition, some of them miss school unnecessarily. But others have real problems that force them to stay at home. Especially the girls, they are always called upon to step in for their mothers in case of home problems."*

Question: *"Like…?"*

Annet: *"For example when there is a sick person at home, or if the mother has to go somewhere, the girl will have to stay at home."*

Question: *"Does this often have anything to do with HIV/AIDS?"*

Annet: *"Yes, sometimes."*

Question: *"Can you explain how?"*

Annet: *"For example when the parents are still alive but sick at home, girls have to take care of them because naturally it's their role. Then after that … I mean after the death or when the parents have gone, it affects them because they lack materials to use. When they don't have materials, they feel like not coming to school."*

Question: *"Do you think teachers understand this?"*

[39] Female orphans FGD.

Annet: *"Yes."*

Question: *"I have heard some complaints about pupils being reprimanded for lack of materials. What is your comment on that?"*

Annet: *"I only got one complaint about a teacher who did it. But you know he had his own problems. He was very sick at the time. He had no money to feed his family and to pay for his medical bills. He was from the North [Northern Uganda] and he lived in a rented house in Bamu [the trading centre]. He had to continue working even when he was very sick because his name was not yet on the pay roll. Normally when a person [teacher] shows signs of 'laziness' before he even becomes an established member of staff, it is possible for him to be replaced. That was his situation; he was kind of trying to impress the head teacher, so he pretended not to be sick even when he was really sick. He was very much stressed and he later died … of AIDS [whisper]. I think he was suffering so much that he could not tolerate things or behaviour that 'disturbed his peace'. That is why he behaved like that sometimes. But the rest of the teachers understand pupils' lack of materials."*

Although Annet had heard complaints about the 'sick' teacher, she was quick to defend him. Yet, such complaints about teachers came up frequently in conversations with pupils. It should be noted however, that not all pupils were unhappy with all teachers. At Tuso primary school, complaints about teachers were quite limited. This could be attributed to the fact that pupils had fewer problems and hence less conflict with teachers' demands. The distance expressed by the UPE girls between them and the female teachers highlights the need for female teachers to get more involved in teaching upper primary level.

3.5.2. Teacher Harry – Does not 'forgive'

During one of the discussions about school-specific problems, pupils raised the issue of corporal punishment. Harry was described as the one who did not forgive. *"Oyo yye akubba; tasonyuwa" ("…* that one really beats, he doesn't forgive…"). Harry was a middle-aged unmarried upper primary teacher. He carried a stick whenever he was at school.

Pupils in his class usually stood up when he entered the class as a sign of respect. They needed permission to talk or go outside for a 'short call'. During the lesson, he read examples from the textbook while the pupils listened. Thereafter he wrote the examples or notes on the board. Pupils were then given time to copy from the board into their exercise books. At such a time, Harry sat for a while, moved out of the class, or checked whether pupils were actually working. Those who had no exercise books were asked to improvise for example by writing in the exercise book meant for another subject. Pupils who had no pens were also asked to borrow. At that point even pupils who had no exercise books left the class under the pretext that they were going to borrow pens and some did not return. During the lesson, Harry kept asking questions to make sure pupils understood. Usually boys tried to answer and most girls kept quiet. He also gave a chance to pupils to ask questions. Again, one or two boys asked, very rarely did girls ask. When there were no more questions, he gave a compulsory exercise. Sometimes it was time for break before pupils could finish the exercise and they had to continue working when Harry was having his break. Pupils then collaborated to come up with correct answers. At the end of the day, Harry believed the lesson had been successful since pupils passed the exercise. Conversations with Harry show that he might have had limited understanding of pupils' problems in the context of HIV/AIDS.

Question: *"What do you think are some of the reasons why girls are less active in class than boys?"*

Harry: *"I think those girls in P.7 are less active in class because they are grown up, and are now more shy than boys unlike the girls in lower classes who don't care whether the answer is right or wrong. The girls in lower class like P.3 and P.4 are not shy. And when some girls, get breasts, they tend to put themselves at the same level as the teachers. They want to be treated as adults and they don't want to be asked questions at all. This makes them drag behind the boys. On the contrary when boys grow, they try harder to show that they can really perform. Although they sometimes also become stubborn, they rarely do that in class. But for girls, that's when they become disrespectful. For example there is a girl called Nancy in P.7, she does not*

respect anybody. Most teachers don't like her behaviour because she is really big-headed."

Question: *"What do you mean by 'big-headed'?"*

Harry: *"She is unruly. For example, she refuses to wear uniform because she knows it's not obligatory. She comes to school late every day and she stubbornly refuses to answer questions even when something is very easy. She is very noisy outside the class and when there is no teacher in class. She is often involved in various disciplinary cases. Even at home, her uncle's wife is always complaining because sometimes we meet her at church and in the market."*

Question: *"So what usually happens when you have such a pupil in your class?"*

Harry: *"We have school regulations here and all pupils are expected to conform to them. Those who violate school rules are usually punished, sometimes by spanking or giving them tasks to do when others are playing. But these days due to a lot of child rights activism, some teachers don't want to discipline pupils. That's why some of us have given up."*

Question: *"What sort of tasks do children undertake as punishment?"*

Harry: *"Things like cleaning the latrines, sweeping walkways, pavements, and the school compound, cleaning the chalk board, standing during the lesson, and sweeping the floor or outside the classroom."*

Harry considered acts like not wearing uniform, tardiness and not answering questions to be signs of 'big-headedness'. There is a need to enhance teachers' understanding of how such problems are not only aggravated by HIV/AIDS but also frustrate the struggle to put girls at the same footing as boys. In this study, it was revealed that some pupils were punished or ridiculed for failure to participate in classroom activities such as reading, writing, or answering oral questions. Most of these 'acts' were beyond the control of the pupils due to the intricate ways in which household circumstances interacted with their school life. Harry's 'tough' attitude as manifested in the expression 'does not forgive' is an idea that is perpetuated by and inherent in the education

system. Mirembe & Davies (2001) also found out that there was social acceptance of punishments for failure to achieve or maintain high academic standards among other things. The role played by teachers in the systematic reproduction of structural social inequality through the hidden curriculum should be remedied (Beyer, 2001). In the context of HIV/AIDS' impact on pupils, teacher dominance is most undesirable. Gender inequality may persist if teachers' poor understanding of the multiple scenes on their teaching landscapes persists.

3.6. A typical rural primary school pupil: Nancy – 'The unruly one'

Nancy was described by one of the teachers as 'unruly' partly because she had no uniform. She was a 12 year old double orphan (lost both parents) in P.7. Her father died in 1999 when she was in P.2, and her mother died three years later (in 2002) when she was in P.5. There after, Nancy and her brother (Ken) immediately re-located to their uncle's place (father's brother). Ken was in P.5 in the same school. Their uncle was married with four children aged 2-8 years. Nancy's household depended on crop cultivation for both food and income from the sale of fruits like avocados, paw paws and mangoes. Nancy was not happy about how she was treated and she felt like an 'outsider' in the home. During school holidays, Nancy preferred to go and visit other relatives but she was denied permission because she had to participate in food cultivation since she made a meagre contribution during the school days. On a typical school day, she woke up early and fetched water (2 rounds) from the well, which was about 1 kilometre away. She used one can of water to wash the dishes and to bathe and she left the second can at home. She also cleaned the house and surroundings. Upon return from school she had to collect water and also work in the garden to fulfil her quota. During the planting season, she got a bigger portion because planting was regarded as easier than weeding or digging. She sometimes missed classes to stand in for her uncle's wife for various reasons. At school, Nancy was the weakest pupil in class. She rarely got things right and she did not participate in answering or asking questions in classroom discussions. Interestingly, however, history shows that she used to perform very well from P.1-P4. After that her performance began to deteriorate until she reached the bottom of the class. Nancy complained about teachers' responses to her situation.

> *"… Sometimes also when my aunt denies me soap I stay at home because the dress is dirty. But the next time I come to school, oh oh oh! … Trouble! The teacher will first punish you for not coming to school. And what's the punishment? Punching you… Also for example if your pant is worn out, when you look at the torn pant, you even fear to go to school because other children can laugh at you if at all they get a chance to see it. But should you miss school because you don't have a pant, the teachers at school can just beat you for missing school. There is even no way you can begin to say your problem. You may be having only one dress and when you wash it, you don't have any other cloth to wear. At times your uniform can be very dirty and you fear to go to school. You ask for soap to wash it and they refuse to give it to you or may be there is no soap in the house. Imagine wearing a uniform, unwashed for one week and continue wearing it for the second week still unwashed. You can decide to stay home because your uniform is very dirty. And if the people at home see you, they beat you instead of giving you soap. And when you go to school they ask you why you missed school. If you tell them that it was because you had no soap to wash your uniform, the teacher can say all sorts of things. They can even begin gossiping about how you have a boyfriend in the class even when it is not true. We are allowed to come without uniform but everybody will be asking what's wrong. I don't like such questions."*

Nancy is one of the many pupils whose childhood has been 'robbed' by AIDS. Although Ken (Nancy's brother) also went through the same impoverishment and the mourning process, his experiences were quite different because he is a boy. Ken's major responsibility in the household was providing firewood. He usually did this in the evening, which meant that he did not have to undertake any tasks in the morning before going to school. Sometimes he helped his sister to carry water but this was voluntary. Ken was always in time for classes, which was rarely the case for Nancy. Several conversations with pupils such as Nancy revealed many problems such as lack of material needs, (including learning materials), stigmatisation, and child labour. Cases similar to Nancy's were not uncommon in both UPE schools.

It was noted that gender differences in access to learning materials and associated problems were more obvious in upper primary classes because pupils in P.1 and P.2 are usually provided with wooden boards on which they wrote using chalk. P.3 and P.4 pupils wrote in exercise books but they were also free to use pencils. Children sometimes shared one pencil by breaking it into pieces. In addition, pupils were allowed to use one exercise book for several subjects. Pupils of P.5-P.7 had to use pens, pencils and separate exercise books for each subject. In this research, limited economic options open to females and their relative powerlessness were noted. Girls who had been affected or made vulnerable by HIV/AIDS were in even more desperate situations in terms of access to learning materials. Nancy's orphanhood might have barely affected her school performance if she had not been a girl. HIV/AIDS increased girls' domestic chores, increased household expenditure and led to reduced income opportunities. Moreover, boys had greater opportunities to access income and learning materials than girls due to unequal power relations wherein girls' behaviour, acts, and relations were restricted. These observations are consistent with those of Smith (2002) about gender differences in access to income due to the impact of HIV/AIDS on households. There is a need for mechanisms to counteract the HIV/AIDS impact and educational gender inequalities. This could be achieved through supporting the development of necessary teacher competencies during this era of HIV/AIDS.

3.7. Teacher competence in the rural HIV/AIDS context

According to Jansma (2005), the education process aims at stimulating, directing, and guiding learning through the interaction between pupils, teachers, and content. This interaction occurs in the environment or landscape in which teachers' work takes place (Connelly *et al.*, 1997). An analysis of school and household observations in the context of HIV/AIDS on rural livelihoods, coupled with that of personal in-depth interviews and conversations revealed a general need to improve and develop teacher competencies while aligning them to pupils' needs in the context of HIV/AIDS. That is, HIV/AIDS as an aspect of the school landscape evokes the need to enhance competencies for teachers to promote gender equality. On the basis of this research, the following competencies have been identified:

3.7.1. Interpersonal competence

This reflects the ability of the teacher to create a pleasant living and working-climate and to provide good leadership in the class (SBL, 2004)[40]. The teacher should create a friendly and cooperative atmosphere, stimulate and achieve open communication, encourage pupils' autonomy, while seeking to establish the right balance between guidance and counselling, steering and following, confrontation and reconciliation and corrective measures and stimulation (*ibid.*). In the context of HIV/AIDS, teachers should be competent in counselling, guidance and follow-up and problem-solving as part of this interpersonal competence.

3.7.1.1. Counselling, guidance and follow-up

This is the ability of teachers to provide support to pupils with various kinds of problems. In all schools, there was a senior female and senior male teacher responsible for the counselling and guiding of pupils on various issues. Pupils in need of counselling were expected to approach the senior teachers. This was quite difficult considering the huge social distance between pupils and teachers. Pupils with livelihood-related problems thought teachers did not understand their problems while teachers thought pupils were 'big-headed'. It is important that children with problems be supported in order to positively influence their education (Bennell *et al.*, 2002; Bennell, 2005). Nancy's behavioural problems became noticeable after the death of her father and when she was nursing her mother. If teachers had been more competent in counselling, guidance and follow-up, they could have more easily recognized her problem and provided the appropriate support. Teachers expressed a need for constant training on how to handle specific issues arising from HIV/AIDS and poverty. Guidance and counselling are part of Uganda's Primary Teacher Education (PTE) curriculum wherein basic facts and procedures are explored. However, the PTE curriculum was designed long before the current magnitude of psychological trauma faced by children in AIDS-afflicted and affected households

[40] SBL is the Dutch abbreviation for the Association for the Professional Quality of teachers (in The Netherlands).

could be anticipated. The findings of this research suggest a need to continuously enhance teachers' ability to guide and counsel pupils with the intention of bringing girls up to the same level of educational attainment as boys. Studies by Amone & Bukuluki (2004a, b) and Carr-Hill *et al.*, (2002) on the impact of HIV/AIDS on the education sector in Uganda also identified counselling and guidance among the areas in which teachers' competencies should be enhanced. Psychosocial teacher training has been implemented in Ethiopia since 2001 by the International Rescue Committee (IRC) in refugee camps as stand-alone sessions in in-service training (See Winthrop and Kirk, 2005). Later on, psychosocial concepts and skills were integrated into all pedagogical and subject matter teacher training. The Government of Uganda and the MoES in particular could follow the lead of Ethiopia and integrate HIV/AIDS-related psychosocial counselling into the pre-service and in-service PTE curriculum for purposes of enhancing teacher competence and gender equality.

3.7.1.2. Problem solving skills

Teachers should be able to identify pupils' problems, analyse them and respond accordingly (Lee & Sabatino, 1998). They should be able to listen to children, respond to them, make them account for unwanted behaviour, stimulate desired behaviour and accept them as they are. Teachers should be more cognisant of pupils' environment and maintain mutual relations with pupils as individuals and as a group. For example the Dutch interpersonal competence requirements demand that teachers strike a balance between confrontation and reconciliation and collective measures and stimulation (SBL, 2004). The findings of this research suggest that teachers' problem-solving competencies–characterised by enforcement of rigid school rules such as those against tardiness, and lack of exercise books in the context of HIV/AIDS –breed gender inequalities in UPE. Harry was unable to recognise the influence of Nancy's home-related problems on her behaviour and academic performance. Harry described Nancy as 'big-headed', 'stubborn' and 'unruly' perhaps because he was ignorant of the reasons behind her conduct. Such descriptions may suggest that Harry was unaware of how the school landscape influenced pupils' behaviour as well as teachers' responses to such behaviour. Annet was more interested in talking about teachers' problems in a sympathetic

manner rather than those of pupils. Teachers seemed to be more judgmental than sympathetic not only in talking about pupils' problems but also in effecting solutions. The act of moving with a stick and the expression "that one really beats, he doesn't forgive" could imply that the classroom environment was more 'militaristic' than friendly. At Tumo primary school, the fact that some girls (in P.7) had to undertake domestic chores in addition to collecting food items to cook at school was not a concern for teachers. All pupils were expected at school at the stipulated time regardless of their circumstances. In the context of HIV/AIDS interpersonal problem-solving skills are extremely necessary in order to promote gender equality.

3.7.2. Pedagogical competence

This can be explained as the ability of teachers to select and apply the most appropriate tools and strategies for instruction. According to SBL (2004) a pedagogically competent teacher should stimulate pupils' social, emotional and moral development and enable them develop into autonomous and responsible persons. Such a teacher creates a safe learning environment and treats pupils with respect. In the study schools, there were no opportunities for teachers to encourage pupils to work independently because classrooms were crowded. In addition, pupils felt that they were not treated with respect. They complained a lot about corporal punishment within the classroom. In the context of HIV/AIDS, this is most undesirable. Instead of being encouraged to work independently, pupils devised mechanisms of coping with teachers' punishment. Girls' coping strategies included collaboration in classroom exercises with the aim of passing them, refraining from classroom discussions and, in some cases, missing school. Boys coped by working harder and therefore learning more. The findings may suggest that the persistence of gender inequality is among the unintended consequences of inadequate pedagogical competence in the context of HIV/AIDS.

3.7.3. Subject matter knowledge and methodological competence

This requires the teacher to have sufficient subject matter knowledge and teaching methods to create a powerful learning environment (SBL,

2004). It includes ability to demonstrate and explain various learning activities and make reliable judgements on pupils' knowledge based on evaluation and testing. In order to promote gender equality in the context of HIV/AIDS, teachers should have subject and methodological knowledge to handle pupils in all classes to facilitate gender-balanced teacher deployment. Uganda's teacher education aims at training 'all-around teachers' equipped with teaching subject knowledge, innovation, administrative skills and patriotism (Aguti, 2003). Yet, it was uncommon in UPE schools to find female teachers teaching upper classes or male teachers in lower classes. The expression: "We only see female teachers from a distance…" by upper primary girls shows the consistency of this practice. Gender equality in teacher composition has been identified as an essential indicator of wider gender equality in education (*e.g.* Wilson, 2004). In order to have gender balanced deployment, it is important for all teachers to have all around subject knowledge and methodological competencies. Female UPE teachers said they felt competent enough to teach lower classes but were less comfortable in upper primary where pupils were more 'stubborn'. In the private school, there were two female teachers teaching upper primary classes. The two teachers were, however, more academically qualified compared to female teachers in UPE schools. This made them not so much more knowledgeable in terms of subject matter but probably increased their confidence compared with their UPE counterparts. Female teachers require sufficient subject and methodological competencies to teach upper primary classes as a strategy for enhancing gender equality. Male teachers on the other hand generally admitted the lack of competence to handle younger pupils whom they considered to be more comfortable with female teachers. Although teachers are trained to be all-round teachers capable of handling all subjects and classes, this research revealed that what happens in practice is different. UPE teachers have each coined their specific niches in terms of teaching subjects and classes depending mainly on interest and experience. Girls in lower primary probably find it more difficult to adjust to male teachers than boys. This coupled with teachers' behaviour as influenced by the school landscape affects girls' classroom participation, school attendance and academic excellence. Having gender balanced deployment of teachers in both lower and upper classes could help to eradicate inequalities especially in classroom participation and achievement.

3.7.4. AIDS competence

AIDS competence has been broadly defined as:

> *"The ability of all elements of society (individuals, families, communities, business, government institutions of all sectors at all levels) to recognize the reality of HIV/AIDS, to analyse how it affects life at home and at work, and to take action to prevent its spread, maintain and improve quality of lives of PLHAs*[41] *families affected by AIDS, and the community at large."* (UAC, 2003: 89)

AIDS competence can be achieved at the community, family and individual levels. Drawing on the above definition, AIDS competence for teachers reflects the ability for them to recognise and analyse the reality and effect of HIV/AIDS on the school community and to take appropriate action to mitigate the effects on the teaching-learning environment. Although teachers recognised the reality of HIV/AIDS, their capacity to transform their knowledge into actions and behaviour aimed at mitigating the impact within the school and classroom environments appeared inadequate. They were still unable to recognise the impact of HIV/AIDS on gender differences in pupils' school attendance, access to learning materials, and participation in classroom activities. Harry's responses about Nancy are a good example: "She refuses to wear uniform because she knows it's not obligatory. She comes to school late every day and she stubbornly refuses to answer questions even when something is very easy..." (see portrait). It was reported that teachers punished pupils who went to school late, missed school or went without exercise books before they could understand their circumstances. Ugandan primary school teachers have received basic orientation on how to implement the Presidential Initiative on AIDS Strategy for Communication to the Youth (PIASCY)[42]. However, only three teachers per school benefited from the orientation that lasted two days. Achievement of AIDS competence essential for gender equality may require the integration of HIV/AIDS issues into

[41] People Living with HIV/AIDS.
[42] See details in Annex V.

the standard pre-service and in-service teacher education programs. This may enable them to put pupils' lives and problems in perspective and perhaps devise new ways of assisting children affected and made vulnerable by HIV/AIDS to learn and achieve more from educational processes.

3.7.5. Gender competence

This may be explained as the ability to identify and recognise socially and culturally constructed differences between males and females, and deliberately work to produce equitable outcomes for both. It was noted that HIV/AIDS had specific consequences on girls' behaviour, access to learning materials and school attendance. Gender differences in tardiness and irregular attendance were understood as being largely influenced by the household gender-biased division of labour compounded by HIV/AIDS. This might suggest that HIV/AIDS impact reinforces the persistence of in equalities in education. The need for teacher gender competence at all levels is a universal one but the severity varies from one context to another. As one moves along the continuum of AIDS affliction from unaffected through affected to most afflicted communities, the need for gender competence becomes more urgent. In this research teacher gender competencies were limited partly because of their location in landscapes where gender inequality is deeply entrenched. Such contexts require meaningful mechanisms for ensuring commitment to non-discrimination (Subrahmanian, 2005). The findings suggest the need to expand and develop teacher gender competence in order to increase their commitment to non-discrimination. They should be equipped with skills to analyse; gender differences within and outside the classroom; the context of unequal power relations; and gender-biased division of labour aggravated by the impact of HIV/AIDS on rural livelihoods.

3.8. Competence development

It has been argued that teacher competence is dynamic in a sense that it evolves and develops along the continuum of professional development (Reynolds & Salters, 1995; So *et al.*, 1996; Cheng & Cheung, 2004; Korthagen, 2004). Dreyfus & Dreyfus (1986) developed a five-stage typology of professional development from novice, to

advanced beginner, competent, proficient, and expert. According to Eraut (1994), it is possible for individuals to continuously expand the scope of their competence and develop the quality of their work. Today, the teacher's role is continually being seen as nurturing children and promoting critical thinking (Coetzer, 2001; Fraser & Lombard, 2002). Such emancipatory learning enhances the understanding of existing power structures thereby facilitating resistance to these structures and their underlying ideologies (Inglis, 1997). This is a shift from the traditional approach in which the teacher relayed knowledge to learners who were expected to undertake pre-planned activities organised and controlled by the teacher (Boulton-Lewis *et al.*, 2001; Mcloughlin & Oliver, 1999). Within such instrumentalist education, knowledge is perceived as an accumulation of facts, rules and skills necessary to achieve a certain end, for example passing examinations. Such education helps to reproduce the social system as it is. There is a general consensus about the role of education in enhancing the development of various competencies required to enable individuals to participate fully in civil society (Wal, 2004), and to develop appropriate abilities for continuity and sustainability (Fraser & Greenhalgh, 2001). However, the question about whether or not competencies can be taught is often posed (*e.g.* Spencer & Spencer, 1993; Parry, 1996; Stoof, 2005). According to Spencer & Spencer (1993), it is possible to teach some aspects of competence such as skills and knowledge, but not others, for example, self-concept, traits, and attitudes. The competencies identified in this research can be developed mainly through training because they pertain to enhancement of knowledge and skills. However, a number of steps must be followed in the process of improving and developing teachers' competencies to enhance gender equality in the context of HIV/AIDS.

3.8.1. Teacher job profiles

Teacher job profiles should be put in place to align teacher development, performance standards, school and contextual needs. Such teacher profiles should stipulate the broad range of competencies required by teachers. In order to promote gender equality in the context of HIV/AIDS, the profiles could specifically emphasise demonstrated attainment of relevant competences for effective professional practice. In the Netherlands, for example, educational programmes that prepare

for specific job profiles and a comprehensive qualification structure have been developed (Mulder & Tjepkema, 1999). The Dutch have a 'Professions in Education Act' (*BIO-act*) that requires teachers, not only to be qualified but also competent. The *BIO-act* teacher competence requirements were developed by the Association for the Professional Quality of Teachers (SBL) and serve as a guide for teacher education. Teachers must fulfil these requirements and schools are obliged to recruit such competent teachers. Uganda's MoES and relevant departments could develop and constantly update primary school teacher profiles aimed at alleviating gender inequalities. Currently there exists no standard profile for teachers. Such profiles would also be useful in a number of ways such as:

- The evaluation of teachers for recruitment and/or promotion by schools or districts in order to know the competencies of teachers on the ground as well as the areas to be emphasised in training programs. Each school should have a minimum number of teachers that have accomplished various milestones in the professional development strategy.
- Teacher profiles could be used for strategic competence building. For example, in the current context of HIV/AIDS specific in-service training targeting enhancement of AIDS competence could be initiated.
- The profiles could facilitate standardisation of teacher quality or updating of professional knowledge for example through a requirement for teachers to regularly re-certify their registration on the basis of their achievements.
- The profiles could provide teachers with a yardstick for self-assessment due to explicit awareness of what is required of them in terms of professional development.

Mulder *et al.* (2005) outlined three components of job profiling: stratification of the profession, categorization of tasks and development of task lists. The MoES could outline various levels of primary teachers, categorise their tasks and list them to come up with a complete map of teacher job profiles.

3.8.2. Teacher education reform

It is important to reform teacher education as a step towards enhancing teacher competence during both pre-service and in-service training. This could include reforms in the PTE curriculum and equipping teachers with capabilities to adjust, integrate and underpin professional knowledge within the context in which they teach. Such reforms could be adjusted to suit the competence needs of teachers at different levels (pre-service or in-service) and additional training provided in terms of seminars and refresher courses for teachers and teacher educators. The approach to education could also be gradually modified from serving instrumentalist to emancipatory goals in the long run.

3.8.3. Basic teacher working conditions

The basic conditions under which primary school teachers work need urgent attention. This could help to improve their motivation and enhance their competencies in specific areas. The relevance of the 1954 Abraham Maslow need hierarchy in teachers' lives should be reckoned with. According to Maslow (1970) motivation follows the satisfaction of needs. Low-level needs (such as physiological, safety and social needs) must be fulfilled before high-level ones (such as self-esteem and self-actualisation). Unless certain needs are met, the motivation to work may be diverted to the quest to satisfy them. Self-actualisation, the quest to reach one's full potential cannot be realised if basic needs are unmet. Annet's rush to explain teachers' problems (see portrait) says something about the gravity of the issue. Enhancing and developing teacher competencies should include mechanisms for improving their motivation to apply them. This could be in the form of incentives ranging from increased salaries to free housing, medical care and so on.

However, competence development in light of the suggested recommendations may be a challenging undertaking. For example, the need to improve the quality of schooling and eradicate effects of crowded classrooms on teacher competence may not be easy to achieve in the short term due to budgetary constraints. Another challenge is the obvious influence of wider gendered power relations on school processes. Teachers may not be able to acknowledge their gender

incompetence for example in a setting where *de facto* discrimination against females is deeply entrenched.

3.9. Concluding remarks

The broad objective of this research was to understand the persistence of gender inequalities in UPE in the context of HIV/AIDS. A focus on teachers was aimed at substantiating the impact of school landscapes on their competencies to promote gender equality. The study was largely ethnographic by design employing participant observation, life stories, ethnographic conversations, ethnographic focus group discussions, and in-depth/key informant interviews. This chapter looked at how gender inequality results from lack of teacher competence required in challenging HIV/AIDS contexts. The findings show that government efforts to eradicate gender inequalities in educational achievement have not yet become fully fruitful. There is a wide gap between male and female school attendance, classroom participation, and academic excellence. Government struggles to put girls at the same level as boys are continually frustrated by the impact of HIV/AIDS, which is positioned in the gap fighting to keep girls down. It is important to detach the effects of household inequality from educational activities, processes, and outcomes. This is possible if teachers can identify, analyse, and develop feasible action plans against pupils' challenges in the context of HIV/AIDS. The findings suggest the need to enhance teacher competence to challenge the impact of HIV/AIDS. The five competencies identified as crucial for teachers in the context of HIV/AIDS are; interpersonal competence, pedagogical competence, subject matter knowledge and methodological competence, AIDS competence and gender competence. These could be developed through planning and implementing reforms in Uganda's PTE. Additionally, mapping teacher profiles would be particularly beneficial to the process of professional teacher development. However, it should be noted that this could necessitate adjustments in the goals of education by adjoining emancipatory learning to the current instrumental approach. Enhancing and developing relevant teacher competencies in the context of HIV/AIDS could intensify the struggle for gender equality in UPE and eventually reshape the wider landscape within which HIV/AIDS operates.

Chapter 4
Classroom interaction and gender equality in pupils' academic competencies in the era of HIV/AIDS[43]

Doris M. Kakuru, Arjen Wals and Martin Mulder

Abstract

One of the objectives of the implementation of Universal Primary Education (UPE) in Uganda was to eradicate gender inequalities. Past research shows that although gender disparities have almost disappeared, inequalities persist. This research sought to understand the relationship between the persistence of gender inequalities and the impact of HIV/AIDS on rural livelihoods. Although previous studies documented the gendered nature of classroom interaction, analysis of the significance of HIV/AIDS on classroom encounters and gender equality in academic competence rather than performance is rare. The questions addressed in this chapter are: a) How does the gendered nature of classroom interaction and pupils' academic competencies follow from the impact of HIV/AIDS on rural livelihoods? and b) Is academic competence enough? The study revealed gender differences in classroom interaction and pupils' academic competencies. Classroom interaction was analysed as resulting from factors external to the classroom including HIV/AIDS' impact on rural household livelihoods.

Keywords: Universal Primary Education, competence, gender equality, classroom interaction, Uganda

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[43] A slightly modified version of this chapter is currently under review by *Educational Research* as: Kakuru D. M, Wals, A., Mulder, M. Classroom interaction and gender equality in pupils' academic competencies in the era of HIV/AIDS.

4.1. Introduction

Over the last couple of decades, HIV/AIDS has had serious short-term and long-term, social, economic, and demographic implications on the development of the affected countries (Barnett, 2004b; Kombe *et al.*, 2005). AIDS-induced poverty is a feature of many parts of the developing world. HIV/AIDS has severely affected household production (Mann *et al.*, 1992), and it is estimated that by the year 2020, one-fifth of agricultural workers in southern Africa will be lost (UNAIDS, 2004). The effect of HIV/AIDS is expected to persist even after the epidemic has been controlled (Whiteside, 2003). Uganda has been applauded for apparent success in preventing the spread of HIV/AIDS (Hogle *et al.*, 2002), using the multi-sectoral approach (Mirembe & Davies, 2001; UAC, 2003). However, even in the era of the acclaimed ability of Antiretroviral Therapy (ART) to restore infected people's health status and productive capacity, there is evidence that the socio-economic impacts of the epidemic continue unabated (*e.g.* see UAC, 2003; Rudolph & Musau, 2005). Due to the challenges of scaling up access to ART, out of 880,000 people living with HIV/AIDS in Uganda, only about 63,896 are benefiting of which 10,600 got it free from the Ministry of Health (UNAIDS/WHO, 2005). The complexity of the impact of HIV/AIDS on key sectors including education therefore persists. The effect of HIV/AIDS on the capacity of education sectors to execute their primary tasks has been well documented (*e.g.* Kelly, 2000b; Bennell *et al.*, 2002; Boler, 2003; Amone & Bukuluki, 2004a; 2004b; Cohen, 2004; Delamonica *et al.*, 2004; Kelly, 2004; Rugalema & Khanye, 2004; Bennell, 2005; Caillods, 2005). However, the considerable intervention of HIV/AIDS with the classroom interaction process and the associated consequences for gender equality have not yet been analysed so far.

The need for the achievement of gender equality has become a global truism (Mbire-Barungi, 1999). The existence of gender inequalities at all levels of education has been a topic of concern for educationalists, sociologists, psychologists, and policy makers and implementers all over the world. The pledge of the world community at the millennium summit to achieve Universal Primary Education (UPE), and promote gender equality in education shows the extent of global commitment. Prior to the implementation of UPE in Uganda, there were obvious

gender inequalities in enrolment, attendance, performance, and dropout rates. The situation was not helped by a pedagogical culture that makes pupils passive recipients of knowledge provided by the teacher. The implementation of UPE in 1997 was among several interventions put in place to address the problem of gender inequalities and disparities. UPE is the provision of basic education to all children of primary-school-going age. It led to the abolition of tuition fees and Parents and Teachers' Association (PTA) charges. The UPE program was implemented to increase educational access and fulfil other national economic, social, and political objectives (Bategeka & Okurut, 2006). It increased enrolment by 73% and drastically narrowed the gender gap in access to primary education (Kwesiga, 2003). In addition, differences in completion and transition rates to secondary education slightly declined after UPE (Bitamazire, 2005). However, other aspects of inequality persist. Research has shown that in the past, girls were not only fewer in numbers but they also always scored lower than boys in the national Primary Leaving Examinations (PLE) (Kwesiga, 2003). In fact, trends in academic performance in Uganda generally continue to decline (World Bank, 2002b). Third grade pupils' national random sample tests revealed a decline in the number of pupils who achieved a satisfactory score from 48% in 1996 to 31% in 1999 in the mathematics test, and from 92% to 56% on the English oral test (*ibid.*). The decline in academic performance has been attributed to the deterioration in quality of schooling due to the influx of pupils associated with UPE (Deininger, 2003). The Government of Uganda has increased the number of classrooms from 25,676 in 1996 to a current 78,403 (Bitamazire, 2005), and the number of teachers from 81,564 in 1996 to 125,883 in 2004 (MoES, 2004). Additionally, the Teacher Development and Management Plan (TDMP) implemented in 1992 was strengthened to enhance professional teacher development, including giving teachers basic sensitisation on gender issues. Several other interventions have been put in place to improve educational quality and eliminate inequalities. Curriculum reform was carried out to adjust education to the needs of the learners and institutions for quality assurance were strengthened[44]. Yet, gender inequalities in

[44] These are the Education Standards Agency (ESA) and the National Curriculum Development Centre (NCDC).

primary education persist (Amanda & Amanda, 2000; Kakuru, 2003; Kasente 2003; Kwesiga, 2003; Okuni, 2003). Although Uganda has made significant progress towards equality, a GEEI (Gender Equality in Education Index) of 54% in 2003 shows that the combat for gender equality is not yet complete (Unterhalter *et al.*, 2005). The objective of the research was to understand the influence of the HIV/AIDS on the persistence of gender inequalities in UPE. Although previous studies documented the gendered nature of classroom interaction, analysis of the significance of HIV/AIDS on classroom encounters and gender equality in academic competence is rare. This chapter is meant to bridge that gap.

4.2. Academic competence and classroom interaction

Academic competence is not only a measure of cognitive skills but also of pupils' classroom participation including involvement in written exercises, oral questioning, or answering. Academic performance, which implies variations in grades or marks/scores, is a quantitative measure of academic competence. Qualitative measures include all the subtle indicators of pupils' abilities to read and write, participate in the classroom activities and exhibit attitudes necessary for excellent performance. Messick (1984) made a distinction between competence and performance. Whereas competence means what a person knows and can do under ideal circumstances, performance refers to what the person is currently doing under the existing circumstances. A pupils' competence may therefore not be attainable if the circumstances are not yet 'ideal enough'. Drawing on the iceberg model of Spencer & Spencer (1993) academic competence may be categorised into surface (*e.g.* knowledge and skills) and hidden elements (motives, traits, self-concept). Knowledge is information a person has in specific content areas, while skill refers to the ability to perform a certain physical or mental task (*ibid.*). Knowledge and skill are relatively easy to assess and develop. In the iceberg analogy, they constitute the tip of what is recognisable. Motives (wants that cause action), traits (physical characteristics and consistent responses to situations) and self concept (attitudes and values) are the underlying elements and therefore less easy to observe and measure. Other elements of competence such as attitudes and values (*e.g.* self-confidence) lie in between the base

and the tip of the iceberg. Knowledge and skills are conceptualised as being shaped by classroom interaction in collaboration with other factors in the school setting including the impact of HIV/AIDS on pupils' livelihoods. The hidden elements that constitute the biggest chunk of competences may also be shaped by classroom interaction in collaboration with other circumstances underlying pupils' lives, including HIV/AIDS.

Competence is commonly used in the workplace sphere but it applies to many different contexts. In the UK alone, the concept of competence is used in five different ways (Mansfield, 2004). Weinert (2001) outlines nine different interpretations of competence. This might imply that cultural contexts influence the perception of competence (Cseh, 2003) and their fulfilment. Competencies are therefore centred on the individual and are a product of the context in which they are applied (Le Deist, 2005). Drawing on Lave & Wenger (1991) and Wenger's (1998) concept of 'communities of practice', academic competence is perceived as resulting from group interaction. A community of practice is a group engaging in a shared practice (Lave & Wenger, 1991). The meaning pupils attach to classroom activities is therefore a result of their interaction as members of the same community of practice.

A large body of theory and research on classroom interaction and gender inequality with evidence from all parts of the world exists (*e.g.* Bloomfield, 1987; Howe, 1997; Kutnick, 1997; Drudy & Ui Chathain, 2002). Classroom interaction occurs in the form of teacher-pupil and pupil-pupil encounters. Past research has suggested that the allocation of pupil-talking-time favours enhancement of boys' academic achievement at the expense of that of girls (Taole *et al.*, 1995; Shakeshaft, 1995; Howe, 1997). Studies on gender differences in classroom interaction have also identified teacher feedback (Sinclair & Coulthard, 1975; Edwards & Mercer, 1987; Howe, 1997) as aggravating the gender differences in addition to pupils' interaction behaviour (Benjamin *et al.*, 2003). Although previous studies demonstrated the gendered nature of class interaction, none of them analysed the significance of HIV/AIDS to classroom encounters. The impact of HIV/AIDS is an aspect of the context that determines how pupils' knowledge, skills and other elements of competence are enhanced or submerged in the process of class interaction. This research also

looks beyond access or gender parity to gender equality. Whereas gender parity is a focus on equal numbers of girls and boys in school, gender equality includes learning experiences, attainment levels and outcomes (Colclough, 2004; Ahmed & Chowdhury, 2005; Unterhalter, 2004, 2005b). It implies equality in the quality of experience of education in terms of enrolment, participation and outcomes. In other words, achievement of gender equality requires ensuring equality of treatment and opportunity or commitment to non-discrimination (Subrahmanian, 2005). Thirdly, the study expands the focus of past research on academic performance to academic competence. The important questions addressed are: a) How does the gendered nature of classroom interaction and pupils' academic competencies follow from the impact of HIV/AIDS on rural livelihoods?, and b) Is academic competence enough? This chapter is based on research conducted in Luweero district in central Uganda in two rural government (UPE) schools (Tumo primary school and Tulo primary school) and one private school (Tuso primary school) between June 2004 and June 2005. Data were collected using participant observation, life history interviews, group discussions, and conversations[45]. We first elaborate the gendered nature of classroom interaction and then link this to HIV/AIDS and pupils' academic competence.

4.3. Classroom interaction

The classroom interaction reported in this chapter took place in form of verbal exchange and their interpretations, attitudes and emotions, as well as written communication. Two types of classroom interaction relevant for academic competencies were identified as teacher pupil and pupil-pupil class interaction.

4.3.1. Teacher-pupil class interaction: Feedback

Teacher-pupil class interaction was analysed in relation to teachers' allocation of pupil-talking-time, attention, and feedback (both written and verbal). It was observed that teachers initiated classroom interaction through giving explanations and instructions, asking

[45] See Chapter 1 section 1.7 for a detailed description of the methodology.

questions, allocating talking-time and giving feedback. Pupils were expected to listen to the instructions and respond by answering oral and written questions. Pupils however had to be allowed to speak by raising their hands. Many teachers tried to vary the pupils selected to answer questions. For example if a pupil answered the first question, the teacher would not allow them to answer the following one even if they raised their hand first. It has been noted that such question-answer pedagogical techniques serve to affirm the teachers' effective control while encouraging pupils to be passive recipients of knowledge (Mirembe & Davies, 2001). In this research, teachers admitted that despite their knowledge of the importance of gender balanced interaction, it was often difficult to achieve it because boys were keener at raising hands than girls. Analysis of school observations and conversations revealed that boys were therefore allocated more talking-time than girls. The findings suggest that teachers could have been unconsciously motivated to allocate more talking-time to boys which in turn further stimulated them [boys] to participate more than girls. These findings are consistent with those of past research carried out by Taole *et al.* (1995), Shakeshaft (1995), Howe (1997), Reisby, (1992) and Drudy & Ui Chathain, (2002). The gendered nature of inequality of talking-time allocation might stem from the fact that pupils created conditions for their contributions to be sought or ignored. For example the quick raising of hands by boys and girls' occupation of a periphery position in class to avoid 'clashing' with teachers. Allocation of more talking-time to boys may be seen as part of the culture in which boys' visibility is greater than that of girls due to the gendered nature of power relations in society. In the context of this research, HIV/AIDS' impact may intensify teachers' unconscious motivation to allocate more talking-time to boys, pupils' creation of favourable circumstances for their contributions to be sought or ignored and inequality of power relations. Some girls were compelled to miss school more than boys or arrive later due to the demand for them to undertake HIV/AIDS related domestic tasks. This aggravates their invisibility in classroom interaction and the associated academic competencies. The implication is that HIV/AIDS is a challenge to gender equality in academic competence since it affects gender-balanced allocation of time and attention. Moreover, the numbers of pupils in UPE classes were too high to allow for balanced interaction.

The type of feedback given by teachers in the process of classroom interaction may also instigate gender inequalities in pupils' academic competencies. Within the classroom, both written and verbal feedback was given. It was noted that written feedback was largely positive unlike oral feedback, which was mostly negative. For example pupils who got all the questions right had comments such as '*very good', 'good', 'excellent'* or '*well done'* appended to their work. Positive written feedback meant so much to pupils that classroom interaction was characterised by a culture in which several strategies were employed to earn it. For example, pupils sometimes repeated the whole exercise just to earn a '*good*'. Pupils also often successfully worked as a team on exercises meant for them to do individually. Positive feedback was not useful for pupils' assessment of their competence contrary to the findings of Verkuyten & Thijs (2002), but rather facilitated the fulfilment of their norms as a community of practice. It emerged that many girls who were culprits of cheating and task avoidance strategies were also habitual absentees. The common causes of absenteeism were related to lack of learning materials or increased demand for household labour attributable to AIDS orphanhood or AIDS-induced poverty. The findings suggest that gender differences in pupils' responses to written feedback and the associated inadequate competence were linked to the impact of HIV/AIDS on their households.

Verbal feedback was generally more negative than positive regardless of whether it was given to girls or boys. However, given that boys were allocated more talking-time than girls, they also received more negative feedback in concurrence with Howe (1997). The findings present a new angle in the revelation of gendered nature of responses to verbal feedback, which was largely negative. Whereas boys worked harder to avoid negative feedback, girls refrained from participation in oral questioning and answering. Based on the nature of verbal feedback, pupils complained that teachers favoured the opposite sex as shown in the following excerpts of guided conversations:

> *"They [girls] don't talk [in class] but teachers also favour them. If the teacher asks a boy a question and he doesn't answer he is beaten, but if it's the girl who doesn't know, the teacher can write it down for her."*[46]

Girls claimed that teachers cared more about boys' scores in tests and examinations.

> *"Yes, teachers like boys. They don't expect us to perform as well as the boys. For example when some boys fail a test, the teacher gets concerned and begins to ask whether they were sick or not. You can see that the teacher is really sympathetic. But if it's a girl…, may be you give a wrong answer in class, he can laugh at you or make fun of you. So to avoid that, when a teacher asks a question, which I'm unable to answer, I have to pretend to be doing something. May be I open my bag, or look at the book to avoid eye contact with them. Teachers usually pick on pupils who are alert or paying attention. But if I know the answer, I look at the teacher confidently."*[47]

The findings show that boys worked harder to fulfil teachers' demands and avoid punishment. Girls on the other hand refrained from answering questions and devised certain strategies, which were detrimental to their academic competence. Although such responses to teachers' feedback may not be unique to the era of HIV/AIDS, their magnitude might have been amplified as a result. In addition to the disadvantages of negative feedback on pupils' self-esteem pointed out by Spender (1986), the findings of this study show that variations in pupils' responses to HIV/AIDS create gender inequalities. Such responses influenced teachers' acts and behaviour in the classroom to which pupils reacted differently as we show later. In addition, hidden emotions, values, self-concept, and other underlying elements of pupils' academic competence are affected by factors external to the classroom. In the context of HIV/AIDS these may include grieving, mourning, AIDS-induced poverty, stigmatisation, fatigue, and

[46] Boys' conversation.
[47] Girls' conversation.

maltreatment. Teacher-pupil class interaction was therefore influenced by the impact of HIV/AIDS on pupils' livelihoods.

4.3.2. Pupil-pupil interaction: Visibility

Pupils' classroom behaviour was understood as being both intentional and spontaneous. It was noted that boys' behaviour was sometimes aimed at challenging teachers' authority, which might have indirectly increased their visibility within the classroom. Girls' motivation to maintain relations necessary for avoiding teachers' punishment further attenuated their visibility. Pupils had their own codes of interaction that teachers could not easily understand. One of the things boys did was to leave a mark in the class at a point where others could not reach and erase. In all schools that participated in the study, there were notes such as "*REMEMBER TOM MUKASA, P6 B 2004*" on the highest point of the classroom wall. This was done to emphasise their popularity and power in class. During one of the lessons observed, one boy (Sam) was pretending to be ill because he was 'bored'. The science lesson came after the English test, which was exhausting for him. The story follows in box 4.1 below.

Box 4.1. Example pupil class interaction.

Sam put his head on the desk and was not bothered about what the teacher was doing with the rest of the class. "Sit properly Sam" the teacher (Amos) ordered, but Sam remained adamant. Amos was getting ready to write notes on the board for pupils' to copy and the rest of the class was preparing to write but Sam was leaning on the desk. "Come and kneel here", said Amos pointing to one of the corners in front of the classroom, which Sam did. Amos was writing on the board, Sam begun to make some faces and some pupils started laughing. Amos realised that Sam had caused the laughter but he had no idea what exactly he had done. He decided to ignore it and continued writing on the board. Then Sam made another funny face and also pointed at the poster of class rules pinned on the wall next to where he was kneeling. The whole class burst out into laughter. When

> Amos turned and looked at him, he pointed again at the wall and faked a cough, but this time fewer pupils laughed. Apparently Sam was imitating another teacher (Mr. Steve) who usually quietly made a certain 'threatening' face and pointed at the rules whenever pupils were out of control. This was his way of warning them and if they did not heed, they got punished. Mr. Steve also often had a cough and he would be coughing at the same time. Amos had no clue what Sam implied but all pupils knew what the faces were about. The last time Sam made the face fewer pupils laughed because they were not sure whether he was about to release their 'secret' and attract punishment from Steve. Amos asked Sam to go and explain to the Deputy Head teacher and the lesson went on.

Boys usually imitated the different ways in which teachers walked, dressed, and talked whenever teachers were not in class. Sam's daring behaviour was therefore more characteristic of boys and was openly staged in class. Such whole-class interaction between pupils was sometimes not so much aimed at infuriating the teacher as establishing the actors' own power and popularity amongst their peers. This perhaps unintentionally enhanced their confidence and visibility. Boys' greater participation in class could be partly attributed to the confidence gained from engaging in such whole-class casual interaction. As earlier noted, they were less absent from school, less fatigued and therefore in a better position to interact at a whole-class level.

Whereas boys' engaged in whole-class interaction, girls had their own characteristic pupil-pupil interaction that took place in smaller groups. Such interaction was located in the strategies employed to cheat in classroom exercises and tests. Cheating in written exercises and tests was facilitated by the free-sitting arrangement in which pupils of the same sex and specifically those who were friends sat together. This arrangement enabled them to collaborate to come up with correct answers. It emerged that pupils often collaborated and helped one another to quickly write down the correct answers especially in cases where the exercise was in the textbook. The first to complete the exercise (usually the smartest) sat in the middle and a friend in the

isle took the exercise book for marking while the rest pretended to be working. After the teacher had marked the work, the rest quickly reproduced it and submitted theirs for marking. The purpose was to impress the teacher and have good comments in their exercise books. Some teachers reported that cheating was difficult to remedy especially in big classes. As a control measure, they sometimes did not return finished work until all pupils had submitted their work for marking. However, some pupils still worked out the answers as a group of desk-mates. It should be noted that the practice of cheating was most common among girls but not exclusive to them. Other strategies largely employed by pupils to avoid the teacher's work or instructions included pretending to be going to borrow pens or for lavatory break. Many girls also refrained from asking questions or even participating in classroom discussions. As earlier noted, giving wrong answers to teachers' questions in class sometimes attracted ridicule, bad jokes and beating. Pupils' anticipation of punishment, ridicule or discomfort from the teacher compelled them to act and behave in certain characteristic ways. Such practices were more common among girls than boys and were also more difficult to identify and correct. The findings revealed the gendered nature of pupil-pupil interaction. Such behaviour included assertion of popularity for boys and task avoidance and cheating strategies for girls. The findings show that girls' interaction behaviour had more negative consequences for academic competences compared with that of boys. It should be noted that such gendered classroom interaction behaviour was shaped by factors external to the classroom, including HIV/AIDS. As earlier noted, girls' invisibility in classroom interaction may be aggravated by HIV/AIDS-related absenteeism, tardiness, lack of lunch or poor access to learning materials. The findings also suggest that the gendered nature of pupils' classroom interaction behaviour shaped academic competencies. Achievement of gender equality in classroom interaction processes and subsequent academic competencies might require improvement in the quality of schooling as well as mitigating the impact of HIV/AIDS on rural livelihoods.

4.4. HIV/AIDS and academic competencies

This section highlights how the impact of HIV/AIDS intensified gender inequality in classroom interaction and subsequent academic

competencies. Despite the abolition of tuition fees in UPE schools, gender differences in attendance were noticeable. Absenteeism of girls from school might have enhanced their need to devise classroom interaction strategies that promoted rather than reduce gender differences in academic competences. Teachers explained the problems they faced with pupils who missed consecutive days or even weeks and later came back to the class.

> *"No teacher has time to go through a lesson that has already been finished especially when the pupil does not show interest in learning."*[48]

In addition, teachers had to handle classes crowded with pupils with various types of HIV/AIDS-related psychological trauma. Some pupils who had been affected or made vulnerable by HIV/AIDS often went to school hungry because their guardians did not care or the food was not enough for everybody as illustrated in the following excerpt:

> *"My friend's father and mother died of AIDS and left her with the step-mother. Her father had separated with her stepmother to marry her mother. When the parents died, the clan meeting resolved that her stepmother should take care of her. Before she comes to school in the morning she has to make sure all utensils used the previous evening are clean. She comes to school without eating anything and takes porridge here at school at lunchtime. Sometimes they eat lunch at home and finish everything. She goes back home after school and finds dirty plates waiting for her to wash. Then she has to prepare the dinner for the family when she is starving. On weekends the stepmother sometimes sends her to the well then she serves all the food. By the time my friend comes from the well, the food is finished even if she is the one who cooked."*[49]

Similar explanations of orphans who were mistreated within their households were quite common. According to the pupils, their inability

[48] Teacher conversation Tumo.
[49] Pupil conversation Tulo.

to concentrate on the lessons was somehow linked to the situation in their households.

> *"Sometimes you can be teaching us and you see we do not understand. May be we are not even listening. At times we are just lost in our own thoughts about home problems. Boys don't have such problems because even stepmothers fear them. They know the boys can beat. Yes, if you are a boy and your stepmother has lugezigezi (is uncooperative) you can decide to beat her and scare her. So these women fear boys. Boys perform well in class because they have fewer problems at home."*[50]

Girls' situations seemed to be more complicated than those of boys because of the household gender relations. Guardians and stepmothers were more likely to marginalise girls compared with boys due to the hegemonic masculinity characteristic of the Ugandan society. Teachers' ability to initiate meaningful interaction with such pupils was probably further constrained by the classroom environment overcrowded with hungry and/or grieving pupils who sometimes did not have learning materials. The actions and behaviour of such pupils could have frustrated teachers and sometimes also rendered them 'hostile' as noted by Kakuru *et al.* (2006). Pupils seemed to notice that teachers were seldom unhappy and suggested variation of teachers as a possible solution to improving schooling.

> *"Sometimes a teacher can be in a bad mood the whole week … and if they happen to dislike you that week, there is nothing you can do to please them. They tend to hit you every time they pass near you, and you are always worried. How can a person learn when they are worried about either being beaten or abused or whatever…? Some teachers can be scary. It's good to have a different teacher after every break."*[51]

[50] Girls' group discussion.
[51] Boys' group discussion.

Synthesis of research findings indicates that HIV/AIDS has negative consequences on gender equality in pupils' academic competencies in UPE. Anecdotal reports have documented the impact of HIV/AIDS on the creation of more orphans. For example, 1.7 million out of the 2 million orphans in Uganda are attributable to HIV/AIDS (WVI[52], 2005). The relationship between HIV/AIDS and poverty is well known (Cohen, 2002; Baylies, 2002). Despite the progress in ART access in Uganda, both the coverage and the adherence are yet to reach satisfactory levels. Increased poverty, AIDS orphanhood and domestic chores for girls therefore continue to heighten irregular attendance, extreme fatigue, lack of materials, and lunch all of which are obstacles to meaningful classroom interaction (Kakuru, 2005). It was revealed that pupils' poor access to learning materials, lunch and other personal needs were worsened by the impact of HIV/AIDS on their households. Gilborn *et al.* (2001) also found out that HIV/AIDS-related illness in adults affected children's schooling in Uganda.

The above analysis is underpinned by the belief that educational gender inequalities do not begin nor end in the classroom. It is widely acknowledged that gender inequalities in education are shaped by the context in which schools exist (Bloomfield, 1987; Nussbaum, 2003; Wilson, 2004; Subrahmanian, 2005; Unterhalter, 2004, 2005b). The question of what comes before the other between agency and structure has been the centre of heated debate between sociologists just like the chicken and egg issue. According to Giddens (1979), individuals as agents shape structure but the structure shapes what they do. The research was conducted in a culture where females are generally less visible and more reserved than males. In this setting, UPE as a program and the entire education system – including the assessment procedures and pedagogical approaches – undoubtedly shape classroom interaction plus the achievement of equality in academic competencies. As Denis and Martin (2005) pointed out, teachers are in a position to define the situation for pupils and not vice versa because the education structure guarantees them unquestionable authority. The unequal power relations in classroom interaction may exacerbate gender inequalities in the allocation of attention and pupil-

[52] World Vision International.

talking-time together with associated consequences. In a patriarchal setting like Uganda, therefore, the effects of male power and authority as constraints for equality of treatment and opportunity do not begin nor end in the classroom. At the household level, unequal treatment occurs in the form of division of labour and allocation of household resources. There is an apparent inequality in allocation of household rights (*both in things and in personam*)[53] (Radcliffe-Brown, 1963), which later shapes girls' capability to participate meaningfully in classroom interaction. In the era of HIV/AIDS impact, the structural barriers to educational gender inequality are multiplied several fold. This is because pupils' livelihood pathways are not compatible with gender equality in classroom interaction and academic competence.

4.5. Is academic competence enough?

The research findings suggest that the consequences of HIV/AIDS on pupils' livelihoods may have exacerbated the gendered classroom interaction and subsequent inequalities in academic competence as illustrated in Table 4.1.

Given the consequences of HIV/AIDS on rural households, it is imperative for pupils to have competencies to participate meaningfully in their lives. The current system and pedagogical approaches under UPE provide the kind of basic education that does not equip children in fragile contexts with knowledge to enhance their livelihoods (WVI, 2005)

The selective and pyramid structure of Uganda's education where most children who enrol for primary education do not proceed to secondary and higher levels of education provokes the question of whether or not gender equality in academic competence in UPE is enough. Available statistics show that at the beginning of UPE in 1997, 2,159,850 pupils out of 5,303,564 were enrolled in P.1. Seven years later [in 2003], only

[53] According to Redcliffe-Brown (1963: 32-33) rights in general include: i) *rights in things* for example pupils having rights to resources and property belonging to their parents, ii) rights in persons (*jus in personam*), for example those that parents have over their children's labour, and; iii) rights in persons against the rest of the world (*jus in rem*) such as those a wife has over her husband and *vice versa*.

Table 4.1 Summary of findings: gendered classroom interaction and academic competence.

Aspect of interaction	Gender differences	Implications for academic competence
Teacher-pupil interaction		
Allocation of pupil talking-time	Boys were allocated more talking-time than girls No attention given to individual pupils	Boys were more confident to participate in class than girls Teachers unable to foster gender equality in classroom participation
Teacher-pupil feedback: • Written feedback was largely positive • Verbal feedback was largely negative	Boys verbally responded to teachers' questions more than girls so they got more negative feedback	Boys worked harder to avoid negative feedback Girls refrained from verbal exchange in class
Pupil-pupil interaction		
Whole-class interaction: • challenging teacher authority • boys' struggle for popularity helped to enhance their academic competencies	Characteristic of boys Easier to identify and collect	Boys were more confident, had better academic competencies Increased boys' visibility
Small group interaction: • cheating • refraining from classroom participation	Characteristic of girls More difficult to identify	Girls were less confident Increased girls' visibility

Source: Authors.

180,067 (8.3%) were enrolled in year one at secondary school level (MoES, 2004). A small percentage of the remaining 91.7% perhaps was absorbed into the few vocational training institutes available for post-primary education. This implies that about 90% of pupils enrolled into

P.1 in 1997 dropped out somewhere along the way and were unable to proceed to higher education. Even if they had been academically competent to excel or interact meaningfully in class, it would not have been of any practical relevance to their lives. Such children could have benefited more from being equipped with competencies to participate in the world outside school. In Uganda, business and entrepreneurship education is allocated at least two forty-minute periods per week per class (see UNCDC, 1999; Kakuru, 2003). However, in all study schools entrepreneurship education did not feature among the subjects taught going by the official school timetables. This observation suggests that although the government is aware of the necessity for entrepreneurship education, not enough is being done to ensure that pupils are equipped with other competencies relevant for participation in their livelihoods. Entrepreneurial competence encompasses personal traits, skills, knowledge, and attitude, which are in turn influenced by the entrepreneur's experience, training, education, family background and other demographic variables (Van der Heide *et al.*, 2006). Boys appeared to be more academically competent because they experience the effects of HIV/AIDS differently due to the gendered imbalances of social norms and practices. Education is a very powerful tool against HIV/AIDS (Mannah, 2002) and gender inequality (World Bank, 2002a). In the context of HIV/AIDS and unequal power relations, the combat for gender equality must not stop at academic competence but should also target equality in competences to participate meaningfully in livelihood enhancement activities. It is therefore important to adjust our education to the context of HIV/AIDS (Kelly, 2000b). Hence, in addition to promoting gender equality in pupils' academic competencies, some efforts should be concentrated on equipping pupils with entrepreneurial or other competencies to curb the onslaught of the AIDS pandemic.

4.6. Concluding remarks

This chapter presents the findings of a study that was undertaken with a goal of understanding the persistence of gender inequalities in UPE in Uganda. It addresses classroom interaction as an aspect of school related factors responsible for gender inequality. The contribution focussed on the extent to which gender differences in pupils' academic competencies result from the impact of HIV/AIDS

on pupils' interaction behaviour. Ethnographic research was conducted in three schools and their villages in rural Uganda. Results show that there were inequalities in teachers' allocation of pupil-talking-time and attention. In addition, teachers' feedback provoked pupils' impression management strategies that might have exacerbated the persistence of gender differences in academic competencies. Two types of pupil-pupil interaction were noted. There was whole-class interaction characteristic of boys and small-group interaction characteristic of girls. Whole-class interaction enhanced boys' confidence, visibility, and capability to interact gainfully, unlike small-group interaction in terms of cheating and tricking teachers, which was not academically helpful. It was realised that the wider societal structure and the impact of HIV/AIDS shaped classroom interaction behaviour and academic competencies. For example, girls' irregular attendance was an impediment to their classroom participation competencies. Their inability to keep up with the pace of classroom activities prompted negative feedback from teachers, to which they responded by refraining from participation. Hence, the effects of HIV/AIDS on livelihoods intervened with classroom interaction and gender equality in pupils' academic competences in UPE in rural Uganda. Low levels of transition to secondary education and the vulnerability of pupils' livelihoods also imply that academic competencies are not enough. The findings suggest that improving school quality could enhance classroom interaction and gender equality in academic competencies. However, addressing school-related factors alone may be inadequate since pupils' livelihoods indirectly influence classroom interaction. Hence, mitigating the impact of HIV/AIDS and enhancing the development of other competencies necessary for livelihood participation could come in handy. Otherwise, the classroom as a field in which male and female pupils compete for academic competence may continue to absorb the social structural influences in the interaction process. The findings suggest that the direction for future research could be in the area of possible strategies for merging the struggle for gender equality in academic competencies with that of equipping pupils with competencies to participate in the world outside school.

Chapter 5
HIV/AIDS, children's rights and gender equality in Uganda's Universal Primary Education[54]

Doris M. Kakuru

Abstract

Despite the implementation of Universal Primary Education (UPE) in Uganda and efforts to eradicate gender inequalities, the task is not yet complete. The persistence of inequalities reflects enduring children's educational rights violations even with Uganda's ratification of various international treaties relating to children's rights. The research was carried out to understand reasons for the persistence of gender inequalities in the context of HIV/AIDS. This chapter uncovers the magnitude of gender inequality in pupils' capabilities to enjoy educational rights in the era of HIV/AIDS.

Keywords: gender equality, capability, HIV/AIDS, education, Uganda

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5.1. Introduction

Education is a fundamental human right (Delamonica *et al.*, 2004). Uganda has ratified several human rights treaties[55] concerning children and discrimination. The international concern for human rights in education is reflected in the 1948 Universal Declaration of Human Rights, the Dakar Framework for Action of 2000, and the Millennium Declaration. Similar commitments are reflected in Uganda's Constitution, which grants every person a right to education and equality (GoU, 1995). Uganda's Children's Statute of 1996 outlines broad protections against corporal punishment, sexual harassment, and gendered discrimination (GoU, 1996). The need to achieve gender equality is also among the objectives of Uganda's Universal Primary Education (UPE) program and the Education Sector Investment Plan (ESIP 1998-2003) re-focussed as the Education Sector Strategic Investment Plan (ESSIP 2003-2015). Educational rights are essential for the achievement of gender equality in particular and human rights in general (Wilson, 2004; Subrahmanian, 2005). The issue of educational gender inequalities has been a matter of global concern for decades. The Ugandan government has put in place various interventions to eradicate gender inequalities in UPE (see Annex VII). However, past research has demonstrated that success has not been realised (Kakuru, 2003; Kasente, 2003; Kwesiga, 2003; Okuni, 2003). According to Unterhalter *et al.* (2005), Uganda's GEEI (Gender Equality in Education Index), which stood at 54% in 2003, shows that gender inequalities persist. This chapter addresses the complexity of achieving gender equality in pupils' capabilities to enjoy educational rights in the era of HIV/AIDS. It arises from research undertaken to understand the interface between HIV/AIDS impact on rural livelihoods and the persistence of educational gender inequalities.

[55] These include the Convention on the Elimination of all forms of Discrimination against Women (CEDAW), the International Covenant on Economic, Social and Cultural Rights in 1986, the Convention on the Rights of the Child in 1990, the International Covenant on Civil and Political Rights in 1995, the African Charter on Human and Peoples' Rights and the Charter on the Rights and Welfare of the African Child. Article 28 of the 1990 Convention on the Rights of the Child (CRC) ratified by 192 countries requires the provision of free primary education to all children (UNHCHR, 1997).

The implementation of Uganda's UPE in 1997 led to the abolition of tuition fees and Parents and Teachers' Association (PTA) contributions to government primary schools. According to Ministry of Education and Sports (MoES) statistics, UPE increased primary school enrolment from 3.0 million in 1996 to 5.3 million in 1997, and 7.0 million in 2004 (MoES, 2004). Girls' enrolment increased from 46.3% in 1996 to a current 49.5%. By the end of 2004, the national Net Enrolment Ratio (NER)[56] was 90.01%, female NER at 87.60%, and male NER at 92.51% (MoES, 2004). Through the School Facilities Grant (SFG), the MoES has so far managed to increase classrooms from 25,676 in 1996 to 78,403 (Bitamazire, 2005). In addition, the number of teachers rose from 81,564 in 1996 to 125,883 in 2004 (MoES, 2004).

Although primary school enrolment has increased, and so has the number of teachers, classrooms and instructional materials, several aspects of children's educational rights remain unfulfilled. The national pupil-classroom ratio still stands at 84:1 (Bitamazire, 2005). According to Deininger (2003), Uganda's pupil-teacher ratios are among the highest in the world. Uganda is one of the 40 countries in the world that have not yet implemented compulsory primary education (Wilson, 2004). Primary education is free only in terms of tuition fees because households provide other requirements such as clothing, meals and learning materials (pens, pencils, and exercise books) (Deininger, 2003). Mehrotra & Delamonica (1998) have reported that less than half of the primary school buildings in Uganda are permanent structures with some districts depicting a less-than-10% scenario. Such public sphere challenges intersect intricately with limitations from pupils' livelihoods including the impact of HIV/AIDS to obstruct gender equality. This chapter focuses on the impact of HIV/AIDS on educational gender inequalities using data from an in-depth ethnographic study.

Uganda is one of the worlds' acclaimed success stories in controlling HIV prevalence but the socio-economic impact persists. Despite efforts to counteract the effect of HIV/AIDS on people's health through Antiretroviral Therapy (ART), only 11% of the eligible patients in

[56] The NER for primary is a proportion of pupils in primary schools that are aged 6 -12 years to the total number of children in the same age group of the population.

sub-Saharan Africa access it (UNAIDS & WHO, 2005). In Uganda, 40% of the clinically eligible people living with HIV/AIDS have access to ART (UNAIDS/WHO, 2005a, b). However, this excludes many others whose clinical eligibility is not officially determined. Mortality from AIDS has continued to create orphans, who constitute 17% of primary school going children (MoES, 2004). In fact 940,000 out of 2 million Ugandan orphans by the end of 2003 were due to HIV/AIDS (UNAIDS, 2004). Some studies have documented the effect of HIV/AIDS on the education sector (*e.g.* Malinga, 2000; Hyde *et al.*, 2002; World Bank, 2002a; Amone & Bukuluki, 2004a, b; Bennell, 2005; Cohen & Tate, 2005; Cohen & Epstein, 2005) However, evidence of the exact ways in which HIV/AIDS relates to children's educational rights and gender inequality is scattered. The argument goes beyond the common perspective of gender parity (or equal rights to education) that emphasises equal numbers of places for boys and girls in schools to include equal learning experiences, attainment levels and the subsequent equal outcomes (Colclough, 2004; Unterhalter, 2005b). Perceptions of gender equality must therefore cease to be restricted to access but expanded to include issues of social justice and fundamental entitlements. This implies that gender equality reflects the availability of mechanisms for ensuring equality of treatment and opportunity (Subrahmanian, 2005). The chapter addresses two major questions: 1) How does gender inequality in pupils' capabilities to enjoy educational rights manifest?, and 2) What is the effect of HIV/AIDS on gender differences in pupils' capabilities to enjoy educational rights in UPE?

This research focussed on developing deeper understanding of the persistence of gender inequality in UPE. I carried out ethnographic fieldwork in Luweero district between June 2004 and June 2005. The research covered three schools and their villages. The schools are referred to as Tumo primary school, Tulo primary school and Tuso primary school[57]. Tumo and Tulo primary schools were government owned and Tuso was a private school. Data were collected from pupils, teachers, parents, and local leaders. In order to immerse into the schools and communities as a participant observer, I worked as a volunteer teacher at each of the three schools for at least four

[57] For purposes of confidentiality, all names of schools and persons are pseudonyms.

months. Within each school, I observed at least 36 own lessons and ten others. I also observed the general school environment including how teachers and pupils interacted outside the classrooms. Household observations were also undertaken in eight households, which were purposively selected (three from each UPE school village and two from the private school village). More data from households were collected using ethnographic conversations and life history interviews in 12 AIDS-afflicted or affected households per school village. Additionally, a review of secondary data was undertaken. Field data were recorded in notebooks, diaries, and audiocassette tapes. Tape-recorded data were transcribed, coded for children's rights issues, interpreted and analysed.

5.2. Gender inequality, capabilities and children's rights

Educational gender inequalities are conceptualised as arising from the effect of wider social inequalities on pedagogical practices and processes. Although human rights are universal entitlements, there are obvious inequalities in their enjoyment in many aspects of life. Inequality of capabilities to enjoy rights entitlements in education is shaped by forces in the school setting such as HIV/AIDS. For example, Mushunje (2006) shows how the impact of HIV/AIDS in Zimbabwe has affected children's protection, increased their vulnerability, abuse and exploitation. A study carried out by Save the Children in South Africa and Swaziland shows how HIV/AIDS contributes to the disruption of living arrangements and directly impacts on children's education (Poulsen, 2006). Children made vulnerable by HIV/AIDS lacked essential requirements for school such as food and clothes. The capabilities of such children to enjoy their educational rights are questionable.

The capabilities approach is a framework for conceptualizing human wellbeing pioneered by Sen (1980, 1992, 1999) and Nussbaum (2000). In this approach, capabilities refer to what people are able to do or to be, rather than how much they command in terms of resources (Sen, 1980, 1992, 1999). Capabilities are therefore alternative beings and doings achievable with a person's social and personal characteristics (Sen, 1980; Nussbaum, 2000; Saito, 2003). Nussbaum's (2000) articulates

a threshold level of capabilities to which everybody is entitled. She provides a universal listing of central human capabilities as a benchmark for an acceptable level of capability. In this chapter, I argue that many pupils in AIDS afflicted societies are below the minimum level of capability required to enjoy educational rights and entitlements.

Capabilities are linked to human rights (Nussbaum, 2003). Capability as freedom to achieve and function implies enjoyment of numerous entitlements enshrined in various international human rights instruments. However, rights entitlements do not necessarily guarantee individuals' capabilities. For example, despite the almost universal ratification of the United Nations Convention on the Rights of the Child (CRC), there is inadequate response to the plight of children affected and made vulnerable by HIV/AIDS (Mushunje, 2006). Within the capabilities approach, gender inequality reflects capability deprivation (Unterhalter, 2003, 2005a) and hence human rights infringement (Saito, 2003). Gender equality implies equality of opportunities and freedom to attend school, learn, participate, and attain education (Colclough, 2004; Aikman & Unterhalter, 2005). In order to achieve equality, it is necessary to secure children's rights to, in and through education (Wilson, 2003).

Tomasveski (2001, 2003, 2006) developed a 4-A framework of government obligations towards ensuring the realisation of education rights to include Availability, Accessibility, Acceptability and Adaptability. *Availability* requires governments to establish schools and to ensure that free primary education is available to all children of school-going age. *Accessibility* implies government obligation to secure access to education for all children entitled to compulsory education. *Acceptability* involves guaranteeing the quality of education through maintaining minimum standards in terms of protecting health, wellbeing, and abuse. There should be respect for diversity and learners' rights. *Adaptability* requires schools to adapt their procedures to the best interests of the child stipulated in the Convention on the Rights of the Child. Availability and accessibility cover rights to education; acceptability concerns rights in education whereas adaptability covers rights in and through education. Tomasveski's 4-A scheme provides a framework upon which the enhancement of pupils' freedoms can be

based. Such freedoms include access to school, regular attendance, completion of the primary cycle, enjoyment of minimum health and safety standards at school, enjoyment of a school environment devoid of corporal punishment and sexual harassment and enjoyment of schools adapted to pupils' needs and livelihoods.

Although rights secure social justice in the public sphere, governments can only achieve certain minimum standards to the maximum of available resources. The right to education is therefore a right of 'progressive realisation' but the prohibition on discrimination is not (Cohen & Epstein, 2005). A focus on capabilities helps to address inequalities in the private arena including the prohibition on discrimination. According to the Committee on the Rights of the Child, *de facto* (indirect or unintended) discrimination – which results from underlying factors rather than law – violates rights standards (Cohen & Epstein, 2005). HIV/AIDS is a factor contributing to the breach of the principle of equal opportunity among children affected by HIV/AIDS, particularly girls (CRC, 2003). Furthermore, girls in various parts of the world suffer inequalities within their households in terms of access to resources, opportunities and educational achievement or deprivation (Nussbaum, 2003). In this chapter, rights and capabilities are used to analyse the impact of HIV/AIDS on inequalities in pupils' access to school requirements, school attendance, teacher-pupil relations, and other issues within the school environment. Bennell (2005) identified three groups of children whose education is most affected by HIV/AIDS. These are the HIV-positive, those in households with sick family members and children whose parents or guardians have died of AIDS. Recent studies about children's rights in schools have mainly been carried out at the secondary level (*e.g.* Mirembe, 1998; Shumba, 2001). Mirembe & Davies' (2001) study reveals harassment in a school culture characterised by male domination and how this counteracts AIDS education programs. Dunne *et al.* (2003) highlight the effect of gendered power relations in schools on child abuse and *de facto* discrimination. In this chapter, I use the capabilities approach and the 4-A rights scheme to explore how HIV/AIDS reinforces unequal power relations as well as capability deprivation in UPE. I analyse the effect of HIV/AIDS on pupils' personal and social characteristics, which determine the achievement of capabilities and enjoyment of rights entitlements.

5.3. Availability and capabilities to enjoy the right to education

Availability here refers to government obligations to secure children's rights to education through making it free of charge and an individual entitlement (Tomasveski, 2001, 2003, 2006; UNESCO, 1999). That is; the elimination of financial obstacles to increase affordability, inclusion and/or universal access. The issue of affordability is particularly crucial for securing availability of education. For example in the study schools, pupils' affordability of learning materials, lunch and clothing was still an obstacle to their schooling because their households were poor. In addition, the direct loss of family income to AIDS-related illnesses exacerbated the inadequate access to school and learning materials. Monica was a grade 6 orphan at Tulo primary school. She lived with her aunt whose husband died of AIDS. She explained that she always faced problems whenever she was in need of a new pen or exercise book[58]. Evas described how she often felt tired and hungry during afternoon lessons because there was no arrangement for her to have lunch[59]. Although all children in poor communities may experience similar challenges, HIV/AIDS obviously aggravates the magnitude of such challenges. Many children affected and made vulnerable by HIV/AIDS did not participate actively in school and classroom activities because of the impact of their situations on access to necessary requirements. Their capabilities to learn and benefit from available education were minimal although they had rights to access the schools. This suggests that pupils' AIDS affliction reduced their capabilities to do things they valued such as attending school daily, accessing learning materials and lunch. The situation was worse for girls, who in addition, suffered inequalities in their households as I show later. Despite government attempts to make basic education affordable particularly by paying tuition fees, providing infrastructure and instructional materials (*e.g.* textbooks, teachers' reference books, blackboards, charts) (Bitamazire, 2005), this research revealed a need to improve individual pupils' affordability and capabilities to enjoy the rights to available schools

[58] Conversation at Tulo primary school, September 2004.
[59] Conversation at Tumo primary school, March 2005.

in order to promote gender equality. In other words, Government has directly enhanced schools' affordability of instructional materials but that of pupils' access to school requirements remains unfinished agenda. Availability of basic education should therefore be expanded to include provision of learning materials and lunch in addition to instructional materials and payment of tuition fees. Otherwise, it is less likely that children – girls in particular – will attend school and participate meaningfully therein.

5.4. Accessibility and capabilities to attend and remain in school

Accessibility to primary education reflects government's obligation to secure access to education for all children in the compulsory education age-range (Tomasevski, 2001, 2003, 2006). Pupils in UPE research schools were required to pay some money for building contribution, lunch, and examinations. Some pupils were at times sent back home to remind parents if they delayed payment. Such pupils therefore missed lessons on those days. Many pupils were often absent from school due to the demand for their labour in the household. In the study villages, households depended on their own labour for food production, preparation, and other reproductive tasks. Primary school pupils – particularly girls – were part of this labour. They worked in crop gardens, fetched water, took care of patients, house sat, baby sat and undertook other tasks on behalf of adults. If there was a sick person at home, girls were required to help because mothers/adults had to continue with agricultural tasks. In the era of HIV/AIDS, household roles have multiplied and the biggest burden falls on females. Some pupils participated in many tasks during school time even when there was no emergency. The following excerpts are examples of pupils' typical explanations of the various circumstances under which they missed school.

> *"For example in a rainy season like this, people at home tell you; 'Cook the beans. What shall we eat?' They even tell you to go and plant sweet potatoes 'Will you eat school? Is it the school that gives you what to eat here?' They can assign to you a piece of land on which you must plant the sweet potatoes.*

Sometimes we are told to stay home to pick coffee from the gardens…"[60]

"Last term when my step-mother delivered a baby and was in the hospital, I was called from school to go and help her. I washed for her and took care of her until she got back on to her feet so I came back to school; like after three weeks."[61]

"Usually I wake up and plan my time knowing it takes about 50 minutes to reach school. Then sometimes just before I set off, someone calls me and sends me to the well or to the shops. Remember the shops are not near; Or they can ask you to go to collect food from the garden. And by the time I return if it's already too late I decide to stay at home that day."[62]

The fact that children missed school even when there was no crisis shows that in situations of emergency, missing school was inevitable. Note that all children who participated in conversations and discussions were those directly afflicted or affected by HIV/AIDS. The point is that HIV/AIDS increases emergency episodes and therefore irregular attendance particularly for girls.

HIV/AIDS had disrupted the living arrangements of children who relocated to relatives' homes after the death of their parents. The poverty situation of many such relatives was aggravated and children suffered the consequences. Like many pupils, Mary had only one dress for school. She washed it once in two weeks or when her grandmother had money for soap, which was rare. Whenever the dress was very dirty, she could not go to school because she felt embarrassed[63]. Hence, although all pupils were poor, HIV/AIDS seemed to exacerbate the already difficult situation. It was revealed that girls undertook more household tasks and had fewer opportunities to earn income than boys. They missed school often and even when they attended, their achievement and concentration were affected by lack of lunch and

[60] Girls' discussion at Tulo primary school, November 2004.
[61] Conversation at Tulo primary school, November, 2004.
[62] Conversation at Tumo primary school, September, 2004.
[63] Conversation at Tumo primary school, March 2005.

learning materials. Availability of UPE schools therefore does not necessarily imply that children's rights are secured because factors external to the education system inhibit accessibility. Implementation of compulsory education would require changing the circumstances under which pupils live. Currently, there is no system to provide home care for patients. There is no alternative to household labour-intensive technology for food production and the household remains the sole source of income. It emerged that the major problem for pupils was not to enrol in school but to attend school regularly. Many girls attended school only when there were no demands for them to stay at home. This implies that some children who were officially considered to be accessing school were mere part-time pupils. Some pupils reported that they were often sent out of class or punished if they had no exercise books and this discouraged them from attending school.

Apart from irregular attendance, accessibility is hampered by dropping out. It emerged that the major reason for dropping out of school among girls was pregnancy, while boys dropped out mainly because of the temptation to work and earn money.

> *"Girls, drop out of school more than boys. Girls are very vulnerable especially in upper classes. Some of them get pregnancies and when they go for holidays, they don't come back. When one tries to inquire, other children in the village will tell you 'so and so got problems'. The word 'problems' in that context means 'pregnancy'. You don't have to hear the rest of the details."*[64]

Pregnant girls were expelled from school or they voluntarily withdrew. In the study villages, teenage pregnancy was considered shameful to the girl and her family. AIDS-related lack of essential necessities ranked high among girls' temptation to engage in sexual relations. This implies that girls' educational rights were violated because their capabilities to have lunch at school, learning materials, shoes, and clothes were deprived. In order to enhance the capabilities of such girls' to remain in school, there is need for interventions to negate their temptations

[64] Head Teacher Tulo primary school, November 2004.

to engage in sexual relations. International human rights provisions do not cater for teenage pregnancy in primary schools perhaps because of the assumption that all children complete the primary cycle by the age of twelve. School observations revealed that there were many children above twelve years in classes six and seven.

The findings of this research show that the capabilities of many girls to attend school are deprived. This is partly because in addition to unequal power relations, HIV/AIDS has affected their social and personal characteristics and afflicted their livelihoods. The Female Stipend Program (FSP) in Bangladesh which is a conditional grant of 1 US$ a month given to girls that maintain a 75% attendance rate has worked miracles there (Raynor, 2005). Indeed that is why Aikman & Unterhalter (2005) emphasised the importance of looking beyond enrolment as far as gender equality is concerned.

5.5. Acceptability: Capabilities to enjoy quality education, minimum health, safety, and protection

Acceptability requires the government to ascertain what is – and is not acceptable to people. It is a requirement for the quality of education, minimum standards of health and safety, and professional requirements for teachers among others (Tomasevski, 2001, 2003, 2006). In this chapter, I highlight issues of quality and child protection in terms of health and wellbeing and child abuse.

The research revealed that the quality of the study schools violated children's rights in education in several respects. At Tulo primary school, most classes were crowded with pupils and furniture placed close together. Three to five pupils who shared a desk also shared a textbook. Some pupils sat closer to the book than others and this undermined their capabilities and freedoms to read and learn comfortably, as well as their rights to equal opportunities. At Tumo primary school, the textbook was usually reserved for the teacher. For example, when I reported at the school, I was provided with the Uganda primary education syllabus with an outline of major topics. I had to organise and purchase the detailed English textbook and teachers' guide. During Mathematics lessons, the teacher wrote everything on

the board. Later, it appeared that the school actually had textbooks but lacked space for their storage. Consequently, school textbooks were kept at the head teachers' home, which was about 3 km away from the school. However, the policy of 'putting books in the hands of children' currently in the process of being implemented by the Ministry of Education will hopefully resolve this problem in the near future.

In addition, conversations with teachers revealed that they were demotivated. Apart from the low salaries currently at about US$ 80 per month, most teachers at the study schools were neither housed nor provided with lunch. At Tumo primary school, there was no staffroom for teachers. They sat under a tree to enjoy the break or mark pupils' work. Teachers also had no toilet facilities and made use of church facilities located next to the school. Teachers at Tulo primary school were better motivated because they were provided with lunch but were unhappy with their salaries and heavy workload. At Tuso primary school, teachers were quite happy because their conditions were much better than those of UPE teachers. In addition to lunch, they were provided with break tea and better salaries. The findings suggest that although classrooms, teachers, and textbooks countrywide had increased, their demand in UPE schools in the study villages was still higher than the supply. Additionally, the persistence of issues related to crowded classrooms, inadequacy of teachers and their poor motivation shows that pupils' capabilities to enjoy acceptable education are not yet fully satisfied. The Government of Uganda has made significant efforts to make education available, probably to the maximum of existing resources. The indirect effect of HIV/AIDS on government capacity to improve existing schools should not be ignored as explained by one Ministry of Education official.

> *"Government is spending a lot of money on funerals, tax payers' money is used to buy coffins and make funeral arrangements e.g. for teachers and other officers at both local and central levels. When officers are sick, they are sometimes given allowances for medical care (especially top-level officers) and often visited by colleagues using government vehicles and fuel. The government sometimes incurs expensive hospital bills. Though this is not always done for everybody, it has a potential to indirectly affect government programmes*

including improving school quality and increasing sensitization programmes for girl child education."[65]

Apart from school quality, children's rights to protection of health and wellbeing were still unsecured. At Tumo primary school, children cleaned the toilets once a week moreover without any safety gear. There was no water at the school and pupils had to fetch it from the nearby borehole (about ½ km away). Although there were separate toilets for boys and girls, they were extremely filthy. Furthermore, there were no meals for pupils and teachers. Most pupils used lunchtime only to play. At Tulo and Tuso primary schools, pupils had access to water and a modest midday meal of a cup of maize porridge. However, both Tulo and Tuso had more crowded classrooms than Tumo primary school.

Furthermore, corporal punishment was widely used as a disciplinary measure both in schools. The study schools had strict enforcement of rules and physical punishment for disobeying them despite the fact that corporal punishment is unlawful as a disciplinary measure. Moreover, pupils were sometimes punished not only for misconduct, but also for lacking learning materials. The following typical complaints were captured from pupils about corporal punishment.

"When a pupil goes to class without an exercise book, the teacher looks at them as if they are looking at an enemy. If you tell them that the book got finished, they hit you and send you out of class. If the book is stolen, they say 'you are the very people who steal others' books'. Even if you suspect somebody to be the thief, you can't just check their bag without teachers' help, but teachers are always uninterested."[66]

"The commonest punishment is beating but some times we are made to slash the grass in the compound. Others dig many deep pits in which to plant bananas or flowers. You can be

[65] Interview with a representative of the Ministry of Education and Sports, Kampala, September 2004.
[66] Conversation at Tumo primary school, October 2004.

> *told to dig a pit that is about five feet deep which a girl can't easily do."*[67]

Lack of exercise books was most common among children affected and made vulnerable by HIV/AIDS. Boys in the study schools were allowed to work for money for educational needs but girls were confined in the household to undertake domestic chores. This implies that more girls than boys suffered corporal punishment related to lack of learning materials. Some pupils in grandparent-headed households in addition to lack of materials were punished for what was described as 'being dirty'.

> *"And madam, another thing I don't like at school is this; when you come to school with envunza [jigger fleas], you are beaten. You may be coming from a home of grandparents who cannot give you enough care. When jiggers eat up your toes, teachers simply beat you for being dirty instead of may be sympathizing. You can't tell teachers the problems at home."*[68]

The plight of such pupils is attributable to AIDS mortality, which disrupts their living arrangements, and changes their social and personal characteristics.

Apart from corporal punishment, research revealed that sexual harassment was still happening in schools. In the following excerpt, the issue came up spontaneously in a discussion[69] about girls' poor participation in class.

> Question: *"Why do you think many girls don't want to talk in class?"*
> Response: *"It's because they don't know the answers to the questions asked by the teacher."*
> Response: *"It's not because they don't know, there is a way these girls relate with teachers."*

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[67] Girls' discussion at Tulo primary school, March 2004.
[68] Girls' discussion at Tulo primary school, March 2004.
[69] Boys' discussion at Tumo primary school, September 2004.

Question: *"What do you mean?"*
Response: *"It's something that we should not feel shy to talk about because even last year it happened."*
Question: *"What happened?"*
Response: *"A girl got pregnant; and [hesitation] it [the pregnancy] was for a teacher. And this teacher stopped teaching here. It seems he heard that the girl had reported him to the parents so he left."*
Question: *"Are you sure?"*
Response: *"Yes, it's true. It's hard for a person to talk about something they are not sure about. And some girls don't keep secrets. If a friend tells her something, she passes it on to others exactly as she heard it. So all of us know what happened."*
Response: *"And at times we see letters written to these girls; letters from the male teachers. Girls also write letters to male teachers. And madam if you see the Luganda these girls use when writing the letters you wonder. They don't even use correct Luganda! [laughter]"*

Girls at Tulo primary school also brought up the issue of sexual harassment in a similar manner during one of the discussions[70] as shown in the following excerpt.

Question: *"What are the other problems that affect your schooling?"*
Response: *"The boys."*
Question: *"What do the boys do?"*
Response: *"They ask us for sex [laughter]."*
Response: *"Even sometimes, we hear stories about pupils being raped."*
Question: *"Really, does that happen here at school or when you are in the village?"*
Response: *"Yes, such things happen here at 'Tulo'. Some teachers even tell girls to collect their books but when a*

[70] Girls' discussion at Tulo primary school, February 2005.

girl goes, the teacher instead does other things … he rapes her. Even a teacher was once fired for that."

Response: *"Yes, he raped a girl. The girl is even here in the school. She is now in primary five [class 5]."*

Question: *"So you mean that problem really exists here?*

Response: *"Yes, and it worries us so much."*

Question: *"Are you sure? Is it possible that male teachers can rape pupils?"*

Response: *"It's not possible, but you know, they can disturb you and even beat you for no good reason."*

Response: *"But madam, a teacher can tell you to take something to his house, when you enter his house he follows you and pushes you to his bed, and he can overpower you."*

Response: *"And the male teachers always say they can never rape girls but surprisingly after they have said so, may be after a week, you hear different stories."*

Response: *"But madam sometimes girls also take them selves [they consent]. One pupil was caught near the house of a male teacher. She agreed to meet with the teacher. It was at night when she was coming from a music show - may be around 01:00h. Her mother came looking for her. They checked in the teacher's house and she wasn't there. They searched in the nearby banana plantation using a torch and saw the girl hiding."*

During conversations, a few teachers, reported that some former colleagues could have misbehaved – for example using sexually insulting words and unwanted touching. However, all teachers with whom the issue was discussed said sexual harassment was nonexistent. Mirembe & Davies (2001) found out that there was harassment between teachers and pupils and between pupils themselves. In this research, it was discovered that harassment between pupils was more verbal than physical and it was less gendered and hidden compared with that between pupils and teachers. It was normal for both girls and boys to hurl sexually insulting words at each other and get away with it. However, conversations with pupils show that harassment by teachers was usually inflicted by the male teachers on female pupils and efforts were made to keep it secret for fear of being prosecuted.

It was reported to be more physical than verbal and sometimes consensual. The effects of sexual violence on pupils' capabilities to participate and benefit from education have been highlighted by past research (*e.g.* see Leach *et al.*, 2003). Unlike Mirembe & Davies' (2001) study, harassment of female teachers by boys did not come up in this research. This research however shows that sexual violence in schools is not a creation of HIV/AIDS impact.

Synthesis of the above findings reveals that pupils were still being exposed to an unhealthy environment, corporal punishment and sexual harassment. Girls suffered double tragedy. In addition to rights violations suffered by all pupils, they were exposed to sexual harassment and associated problems including unwanted pregnancy and HIV. Whereas pupils underwent corporal punishment, those who had been affected by HIV/AIDS were at a greater risk of being punished for lacking materials or for being dirty. The findings show that government obligations to secure educational rights related to minimum quality health and safety standards and child protection are not yet fulfilled. Additionally, capabilities to enjoy acceptable education are further deprived by the impact of HIV/AIDS on their livelihoods.

5.6. Adaptability: Capabilities to enjoy education adapted to pupils' needs

Adaptability requires schools to adapt to pupils according to the yardsticks of the best interests of every child as predetermined in the Convention on the Rights of the Child (Tomasevski, 2001, 2003, 2006). The need to adjust educational processes to the context of HIV/AIDS has been emphasised by Kelly (2000b). Observation data revealed that there were limited mechanisms for schools to adapt to children's needs. In the study villages, most pupils dropped out of formal schooling after class seven or could not proceed to secondary schools. It is therefore important for them to be equipped with skills to participate meaningfully in their livelihoods. Although entrepreneurship education was recognised as a valuable subject, it was not allocated time as one of the subjects to be taught in the study schools. Instead, pupils were involved in tasks such as digging and cleaning the school gardens. Some pupils reported that they were not happy about their involvement in

tasks such as working in school gardens – even when the sun was too hot– instead of being in class.

> *"Some of us leave home after digging and arrive at school very tired. While at school, teachers sometimes make us dig in the afternoon. At least if they could make us dig, say in the mornings or evenings but not in the afternoons. In afternoons the sun burns us so much."*[71]

Although the curriculum provides for the teaching of practical skills, it appeared that the purpose of involving pupils in digging was not to equip them with such skills. Rather, pupils helped to save costs on labour for mowing lawns and keeping the school premises clean. In many urban schools, entrepreneurship education is taught as an examinable subject called integrated production skills (IPS), unlike in many up-country schools where the need for adaptability is most pronounced. This shows regional inequalities in adaptability of education to pupils' needs.

Furthermore, pupils in the study schools were subjected to national Primary Leaving Examinations (PLE) without necessarily adapting them to school needs and circumstances. At Tumo primary school, there was no examination centre where pupils could take the P.L.E. Pupils were registered at another school (about six kilometres away) where they spent three days sitting the examinations. They were required to pay some money for subsistence, which was subsidized by the school. Such pupils had to compete for places in secondary schools with others who had better facilities. The opportunities of girls in the study schools were further attenuated by the gendered power imbalances within the household and the impact of HIV/AIDS. Adjustments in timetable in the study schools were made to increase the time for upper primary pupils at school. It was extremely difficult for girls in upper classes to attend regular lessons and instead of adapting the timetable to the needs of such pupils, extra lessons were created. Therefore issues specifically affecting girls such as rules against tardiness, and irregular attendance remain unchanged

[71] Conversation at Tulo primary school, March 2005.

and in the context of HIV/AIDS, inequalities become intensified. However, it should be noted that some efforts have been made by the government to adapt schools to learners' needs. For example, after the implementation of UPE, school uniform was no longer compulsory. In addition, primary school curriculum review[72] was undertaken with the aim of making basic education relevant to individuals' needs. This was to develop functional literacy and numeracy, effective communication skills in local languages, appreciation of diversity in cultural practices, traditions and social organisations, acceptance of variety of social beliefs and values. Despite the above efforts, the realities in the study schools show that the challenge is still apparent.

5.7. Discussion and summary of the findings

This chapter reveals that despite the implementation of UPE, there are noticeable inequalities in pupils' capabilities to access school requirements such as exercise books, pens, pencils, clothing, and lunch. Access to school requirements can be perceived as an aspect of affordability. Despite the efforts of MoES to improve universal affordability, the situation in AIDS-afflicted households demands special attention in order to enhance capability equality. HIV/AIDS has affected educational accessibility for example by increasing the demand for domestic labour. This has worsened gender differences in irregular attendance. Gender differences in accessibility have been analysed as being based on the conflict between household roles and education in poor agrarian communities (Buetel & Axinn, 2002). In the context of HIV/AIDS, such a conflict is aggravated since more household tasks are created and the poverty situation is worsened. Although Colclough *et al.* (2000) argue that adverse cultural practices are more powerful deterrents to girls' schooling than poverty, the findings of this study show the consequences of overdependence on household labour, on capability equality. I therefore concur with Buetel

[72] A curriculum review task force and subject panels were set up to steer the process. This resulted in two volumes of the new curriculum, the first volume of the primary school curriculum containing four core subjects (English Language, Integrated Science, Mathematics and Social Studies) and the second volume containing integrated production skills (IPS), Kiswahili and mother tongue, Music, Dance and Drama, Physical Education and Religious Education.

& Axinn (2002) that transforming society in ways capable of reducing over-dependency on household labour could promote equality.

Robeyns (2003) has noted that inequalities in resources can significantly induce inequalities in capabilities although various factors influence individuals' abilities to convert resources into functionings. This study shows that the impact of HIV/AIDS on individuals' capabilities and functionings continues to expand to schools. Variations in pupils' access to learning materials, school attendance, and tardiness have consequences for violation of rights to protection and hence acceptability and adaptability are also compromised as a result of HIV/AIDS impact on households. Girls missed school arrived at school later, and dropped out more than boys. Hence, the degree to which their schooling was accessible, acceptable, and adaptable was generally lower than that of boys. Girls in the study schools generally underwent corporal punishment related to tardiness, lacking materials, and missing school more than boys. The influence of HIV/AIDS on these aspects need not be ignored. It has ultimately amplified capability denial as well as inequalities in pupils' rights to, within and through education.
In addition, the existence of HIV/AIDS presents another challenge to government and probably cripples the capacity to fulfil obligations in terms of guaranteeing availability, accessibility, acceptability, and adaptability. HIV/AIDS' impact on household livelihoods and government capability to fulfil educational obligations therefore yields human rights violations and gender inequalities in UPE. Table 5.1 summarises the perceived indirect impact of HIV/AIDS on human rights and gender equality in UPE.

5.8. Concluding remarks

The objective of this research was to understand reasons for the persistence of gender inequalities in UPE despite deliberate interventions to address them. Data reported in this chapter were collected from an in-depth ethnographic study in Luweero district in Uganda. Drawing on the capability approach to gender equality and the 4-A educational rights scheme, this chapter highlighted pupils' educational rights violations in UPE. The research shows that HIV/AIDS reinforces existing inequalities in pupils' capabilities to attend school, remain in school, access learning materials and other

Table 5.1. Educational rights, HIV/AIDS and gender equality.

Children's educational rights	Situation in the study schools in rural Uganda	Effect of HIV/AIDS on persistence of gender inequalities
Availability (Right to free education)		
Education should be free of charge It should be an individual entitlement	Tuition fees were abolished when UPE was launched Instructional materials, teachers, textbooks, classrooms have been increased Pupils must bring own learning materials (exercise books, pens) Lunch is not officially provided Pupils organise other needs **e.g.** clothing, soap	Increased poverty and therefore capabilities to access required materials Disruption of living arrangements worsened poverty situation and increased non-attendance
Accessibility (Right to compulsory education)		
Access to compulsory education Elimination of obstacles to irregular attendance Elimination of obstacles leading to school drop out	Tuition fees were abolished but education is not compulsory Pupils buy own learning materials No mid day meals	Increased household demand for children's labour and differences in school attendance Pregnancy is a major cause of drop out Adolescent pregnancy partly caused by AIDS related capability denial
Acceptability (Rights in education)		
Quality of primary education Minimum health and safety standards Child protections Corporal punishment Sexual harassment	Inadequacy of classrooms and textbooks Low teacher motivation due to low salaries, lack of houses and school facilities such as toilets and staffroom Filthy toilets cleaned by children No water at one UPE school Corporal punishment used as a disciplinary measure	Some factors responsible for pupils' exposure to corporal punishment are due to HIV/AIDS *e.g.* lack of materials and tardiness HIV/AIDS related expenses divert government finances from education sector
Adaptability (Rights in and through education)		
Schools should adapt to pupils' needs	Entrepreneurial education not included in rural school time tables as expected Pupils are subjected to national examinations irrespective of differences in facilities. Rules against pregnancy persist School uniform no longer obligatory	Differences in school dropout due to pregnancy are partly attributable to HIV/AIDS

Source: Author.

requirements such as lunch and clothing. HIV/AIDS changes pupils' social and personal characteristics. Some pupils become orphans, their living arrangements are altered, and their poverty situation is worsened, implying that their capabilities to be and to do things they value are deprived. This suggests that as long as there is poverty and overdependence on household labour for subsistence, securing children's rights to compulsory education might remain problematic. Although all pupils were exposed to capability denial and therefore violation of rights, girls in particular faced compounded denial and violation. For example, they suffered sexual harassment and associated consequences. Apart from sexual harassment, a repertoire of rights issues endures in schools. The role of HIV/AIDS in the perpetuation of children's rights infringement cannot be over-emphasised. The indirect impact of HIV/AIDS on gender equality in pupils' capabilities calls for specific interventions to enhance pupils' capabilities to enjoy educational rights. This could be by means of developing a human rights perspective of educational gender inequality. Based on such a perspective government could develop a wider framework within which a list of the most central capabilities could be formulated as a benchmark for their enhancement. Nussbaum (Nussbaum & Jonathan, 1995; Nussbaum, 2000) noted that in pursuit of gender equality, there is need to have; as a matter of importance, a list of basic entitlements-even if it is tentative or revisable.

Chapter 6
Intersectionality and HIV/AIDS: Towards a framework for understanding educational gender inequality in rural Uganda[73]

Doris M. Kakuru

Abstract

Gender inequalities have persisted in Uganda's primary education regardless of specific interventions put in place to eliminate them. These include the implementation of Universal Primary Education in 1997. Research was carried out to understand the reasons for the persistence of these inequalities. This chapter highlights the nature of the various intersections that shape the background of direct and *de facto* discrimination upon which gender inequality thrives in a context of HIV/AIDS. Addressed are significant social dimensions with respect to rural education: class/wealth, age/generation and health/status of AIDS-affliction. I argue that HIV/AIDS affects all other categories thereby adding impressively to the magnitude and complexity of inequalities. Measures aimed at achieving gender equality in such a context should therefore not only broadly target girls or boys as a single category or gender dimension, but rather include specific interventions for those dimensions that cause subordination in various ways.

Keywords: intersectionality, discrimination, gender equality, HIV/AIDS, Uganda

[73] A slightly modified version of this chapter is currently under review by *Gender and Education* as Kakuru, D.M. Intersectionality and HIV/AIDS: towards a framework for understanding educational gender inequality in rural Uganda.

6.1. Introduction

The need to achieve gender equality and the associated principle of non-discrimination are recognised in major international human rights instruments including the 1948 Universal Declaration of Human Rights, the 1981 Convention on the Elimination of all forms of Discrimination Against Women (CEDAW), and the 1990 Convention on the Rights of the Child. Uganda has been grappling with eliminating gender inequalities in all aspects of life for decades. The promulgation of the 1995 constitution of the Republic of Uganda was a major step in providing legislation as a prerequisite foundation for the achievement of gender equality. The implementation of Universal Primary Education (UPE) in 1997 was among the major interventions put in place to challenge gender inequalities. Uganda's struggle with gender inequalities has largely been influenced by the GAD (Gender And Development) approach, which focuses on the need to change the power relations in order to counteract gender inequalities. The complexity attached to the process of redistribution of power implies that GAD is not easy to translate into simple policy demands (Unterhalter, 2005a). According to McIlwaine & Datta (2003), there have not been any major calls by anybody, for the need to redistribute power – which is a basis for inequalities – because of GAD. Uganda's approach has been characterised by gender mainstreaming or making gender perspectives central to all activities, policies and plans. The Ministry of Education and Sports (MoES) for example has integrated gender into all its policies and practices. This gender mainstreaming process is part of the education Sector Wide Approach (SWAp) in which multiple donor support is given to a programme guided by a common approach (Amanda & Amanda, 2000). The Uganda education SWAp or the Education Strategic Investment Plan (ESIP 1998-2003) refocused as the Education Sector Strategic Investment Plan (ESSIP 203-2015) was/is believed to facilitate effective gender mainstreaming to reach desired equality. Uganda's ESIP is based on the understanding of the existence of linkages between gender, poverty and education. The sector program was developed in response to the challenges of the implementation of UPE in 1997. Although gender mainstreaming is part of ESIP, a close look at the objectives and strategies shows that only gender parity rather than equality is specifically mentioned (Amanda & Amanda, 2000). Gender mainstreaming has therefore not

yielded outstanding benefits in terms of enhancing gender equality in UPE in particular.

The implementation of UPE in January 1997 has almost bridged the gender gap in enrolment. According to Ministry of Education and Sports (MoES) statistics, UPE increased primary school enrolment from 3.0 million in 1996 to 5.3 million in 1997, and 7.0 million in 2004 (MoES, 2004). By 2003, girls constituted 49% of the primary school enrolment (Kwesiga, 2003). Taken at face value, one can be deceived that gender inequalities are disappearing since almost equal numbers of girls and boys are enrolled in school. However, there is evidence that despite the implementation of UPE, several aspects of inequalities persist (Amanda & Amanda, 2000; Kakuru, 2003, Kasente, 2003; Kwesiga, 2003). Uganda's GEEI (Gender Equality in Education Index), which stood at 54% in 2003 compared with that of Mauritius at 81% shows that gender inequalities persist (Unterhalter *et al.*, 2005). In fact, Aikman & Unterhalter (2005) emphasised the need to look beyond the point of access or gender parity – where there are same proportions of girls and boys enrolled – in order to transform policy into practice. In the era of HIV/AIDS, gender inequalities continue to be reinforced (Ellis, 2000; Smith, 2002; Muller, 2004)) and transforming gender policies into real practice therefore becomes more urgent.

Some scholars have advocated for the need to reconceptualise GAD towards better acknowledgement of diversity and more emphasis on human rights (McIlwaine & Datta, 2003). Although gender mainstreaming is based on the recognition of embeddedness of gender norms and assumptions as a driving force behind gender inequalities, it may not easily yield results because it appears to be more of a political strategy than a social policy (Mazey, 2000; Dally, 2005). That is, it is bent towards rendering mainstream policies more effective in a bid to improve governance through redistributing the responsibility for gender across the administrative hierarchy rather than promoting gender equality (Dally, 2005). A broader perspective of equality should be taken to include equality of treatment and opportunities in all aspects of life. Gender equality has been described as achievement of equal opportunities to school attendance, learning and educational attainment (Colclough, 2004; Aikman & Unterhalter, 2005).

Achievement of such equality requires the recognition of the fact that inequality results from human diversity and conflict. That is, individuals with various identities sometimes have differing interests and those with uniform identities share common special/unique interests. It is also well known that individuals can be discriminated against on several grounds (Crenshaw, 1994) or victimised uniformly (Mohanty *et al.*, 1991). Such multiple discrimination can be *de jure* (intentional, direct, or formalised by law) or *de facto* (indirect or caused by underlying factors). The need to focus on diversity has been properly articulated through the concept of intersectionality, which addresses multiple discrimination. Intersectionality was developed in the US in the late 1980s-early 1990s and has gained enough ground in the academic arena. However, the concept has not yet exhausted its potential because it has remained largely academic (Makkonen, 2002). Considering that the Ugandan Government has not yet realised full success in the combat for gender equality, it is important to refocus, revise or strengthen its approach to gender equality. Few would deny that if there is inadequate understanding of the specific contours of gender inequality, interventions aimed at addressing them are likely to be less effective as well (Crenshaw, 2000). In this chapter, the concept of intersectionality is used to propose a framework for better understanding of gender equality in UPE. It highlights the intersections that shape the background of unconscious discrimination upon which gender inequality thrives. These intersections are between systems of subordination (*e.g.* patriarchy and economic disadvantage) or between categories of difference or identities (*e.g.* gender, age, class, status of AIDS affliction).

Although Uganda has been considered to be among the world's earliest success stories in declining HIV prevalence (Hogle *et al.*, 2002), the socio-economic impact of HIV/AIDS continues to manifest widely (*e.g.* see UAC, 2003; Rudolph & Musau, 2005). This is because of the current challenges of scaling up access to Antiretroviral Therapy (ART). Currently, about 63,896 (of whom only 10,600 receive free treatment from the Ministry of Health) out of 114,000 clinically eligible people living with HIV/AIDS have access to ART (UNAIDS/WHO, 2005a, b). Even among the persons accessing ART, there are several challenges to ART adherence, which constrain its therapeutic benefits. The fact that HIV/AIDS worsens the poverty situation (Cohen, 2002),

and creates more orphans (Bennell, 2005) implies that it magnifies the complexity of human diversity. The role played by HIV/AIDS in the multiplication of marginalised sub-categories of the population and therefore unfavourable intersections is very crucial. For example the ways in which unique experiences of children affected and made vulnerable by HIV/AIDS are subsumed under those of girls in general are discussed. In the attempt to propose a framework for better understanding of gender inequalities, the following questions are addressed: a) What is the nature of the various intersections that shape the background of discrimination upon which gender inequality thrives?, and b) How are the unique experiences of girls affected and made vulnerable by HIV/AIDS subsumed under those of girls in general? In this chapter, I highlight how pupils' gender intersects with their socio-economic status, age, and AIDS affliction to counteract the combat for gender equality in UPE.

6.2. Intersectionality and vulnerability to gender inequality

Intersectionality is a model used to map multiple realities and identities used by Crenshaw (1991, 1994) to show that various categories of difference are neither exclusive nor inseparable. It is a tool for understanding and responding to different ways in which various identities intersect, and how the intersections facilitate oppression and privilege. It is based on the assumption that people occupy multiple layered identities derived from social relations, history, and the operation of structures of power. People's membership to several communities at the same time implies that they experience either multiple oppression or privilege simultaneously (AWID[74], 2004). In other words, intersections between different identities determine individuals' statuses and power (Van der Hoogte & Kingma, 2004). Hence, the multiplicity of identities implies that several types of discrimination occur as a result. It is believed that systems of discrimination such as patriarchy, class, and racism create inequalities that structure the relative positions of individuals. Crenshaw (2000) identified the 'twin problem' of over-inclusion and 'under-exclusion'.

[74] Association for Women's rights In Development (AWID).

Over-inclusion occurs when "a problem or condition that is particularly or disproportionately visited on a subset of women is simply claimed as a women problem" (Crenshaw, 2000: 5). That is the multiplicity of realities and identities involved is absorbed into a gender framework to the detriment of the contribution of the other analytical categories. Under-inclusion on the other hand occurs "when a subset of women who are subordinated experience a problem, in part because they are women, but it is not seen as a gendered problem because it does not reflect the experience of women from the dominant groups in society" (Crenshaw, 2000: 6). In under-inclusion, the group difference makes the problem invisible and in over exclusion, the difference itself is invisible. Intersectional discrimination can be rendered invisible in contexts where economic, cultural or social forces shape the background that places women in positions of vulnerability to some other system of subordination. Such background forces may be so widespread that they are rendered invisible or seemingly unchangeable. In such contexts, the most obvious aspects of discrimination are concentrated on. For example, irregular school attendance is sometimes considered a result of gender-biased division of household labour but it is actually an intersectional problem. Patriarchy, age and socio-economic status are part of the background factors that conceal the intersectional nature of such issues and for example make girls absorb the consequences of gender-biased division of labour. Hence, girls are subjected to various burdens of gender discrimination in addition to other factors regarding their identities. That is, particular subsets of girls experience unique vulnerabilities and multiple discrimination. Since specific experiences are subsumed under broader categories, the full scope of their intersectional vulnerability cannot be known.

Crenshaw (2000) used the metaphor of intersectional accident to show the impact of clashes between the various axes of power such as race, ethnicity, gender, or class on the experiences of women. The axes represent the thoroughfares that structure the social, economic or political terrain through which the disempowering dynamics travel. According to Crenshaw, although the thoroughfares are distinctive and mutually exclusive, they often overlap and cross each other creating complex intersections at which two or more of them may meet. Burdened groups of women are located at these intersections by virtue of their identities. To obtain the resources of life, they must

successfully negotiate the traffic flowing through these intersections. Since there is traffic flowing simultaneously from all directions such women are at a risk of sustaining injuries should the impact of traffic from one direction throw them into the path of oncoming traffic. Some injuries also occur because of simultaneous collisions.

Drawing on Crenshaw's intersectional metaphor, I assume that some groups of the population are either more vulnerable to oppression, or more privileged than others. There exists a continuum of vulnerability to inequality based on the manner in which individuals' identities/statuses intersect subjecting them to the various systems of subordination. The more 'oppressed' statuses a person occupies, the more vulnerable they are to inequality and therefore to violation of rights to non-discrimination. That is, privileged categories/statuses face lowest vulnerability to inequality and deprived statuses face highest vulnerability to inequality as illustrated in Figure 6.1. The closer one's group/category is located towards the position of highest vulnerability to inequality the greater their ability to successfully negotiate the traffic intersections and vice versa.

It should be noted that for some dimensions or categories, opportunities for social mobility exist. This is not the case for ethnicity and gender, although alliances made with the ones less vulnerable to inequality

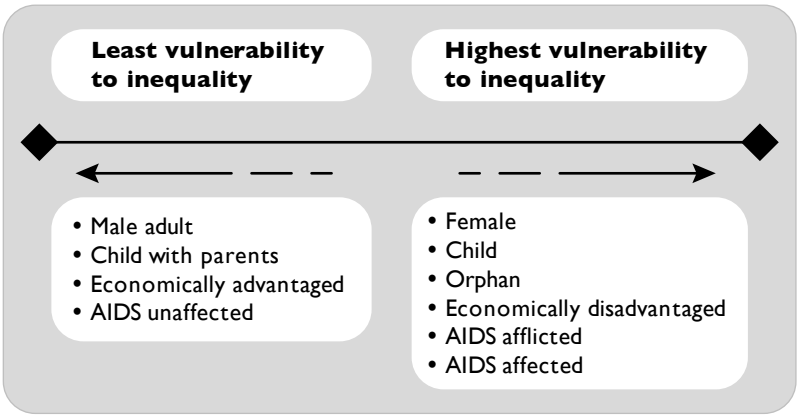

Figure 6.1. Continuum of gender inequality vulnerability. Source: Author.

(*e.g.* healthy adult, whites and males) can down play the effects of discrimination. Individuals may sometimes move from one position of relative vulnerability to another or from one end of the continuum to another. For example, advancement in age facilitates a boy child to move gradually from the position of highest vulnerability towards less vulnerable positions, which may not necessarily be true for girls. On the other hand, orphanhood increases the vulnerability of a formerly less vulnerable child but adoption can again diminish some of its effects. In addition, some changes are gradual (*e.g.* advancement in age) while others may occur rapidly (*e.g.* transition to orphanhood). Each of the above identities can be further broken down into sub-categories and within each category or sub-category there is a dominant group (*e.g.* males) with more entitlements than the subservient group (*e.g.* females) with more obligations and experiencing more subordination. According to Nussbaum (2000), individuals have varying entitlements depending on their bargaining position. Hence, people with weakest bargaining positions, have fewer entitlements and therefore highest vulnerability to inequality. The categories presented above are only those relevant for this research. Others could include rural versus urban location, ethnicity, race and religion.

6.3. The research process and setting

It is common knowledge that social life is composed of complex unequal relations between people of diverse backgrounds, resources and power. In order to understand diversity in all its complexity and challenge inequality, we need to understand how systems of dominance include some people and exclude others (Plantenga, 2004; McCall, 2005). In this study, revealing the complex diversity, variation and heterogeneity of social life was made possible through ethnographic fieldwork and the use of 'thick description' (Geertz, 1973, 1976). At the beginning, traditional categories of difference such as gender, and class were delved into, from which further sub-categories, dimensions and diversities were identified. Deeper understanding of their experiences with denial of equal treatment and opportunities were sought through various data collection methods. These included school and household observations, ethnographic conversations, focus group discussions and life history interviews. The research was conducted in two government schools (Tumo primary school and Tulo

primary school)[75] and one private school (Tuso primary school) in Luweero district in Uganda. Working at the study schools as a teacher, I observed school and classroom experiences of pupils belonging to various categories/identities. For example how pupils' classroom behaviour, school attendance, academic competence, school dropout rates and punctuality at school varied according to their age, gender, socio-economic status and status of AIDS affliction. Life history data were particularly useful in revealing how experiences had contributed to the construction of pupils' identities, rendering them either more or less vulnerable to gender inequality. Ethnographic conversations and group discussions facilitated the identification and description of pupils' realities and experiences with multiple discrimination in relation to the contextual factors and the magnitude of their contribution to the problem.

All data were analysed for intersectionality through listening, reading and interpreting 'against the grain'[76]. During the interviews, efforts were made to facilitate this analysis through careful listening to give the narrators opportunities to fully tell their story. In addition, I looked at the transcripts and texts carefully in order to identify and understand intersectionality. Interview transcripts were read and re-read to discover the various intersections between gender and other categories of difference. In the process of reading and re-reading, the technique of 'asking the other question' (Matsuda, 1991; Bender, 1994) was employed. For example if a girl was compelled to drop out of school due to pregnancy, in analysing the transcript, I still asked myself questions like 'where is the economic disadvantage or AIDS-affliction in this?' Despite the complexity of social life and the difficulty of demarcating boundaries between categories, efforts were made to focus on various groups of girls at neglected points of intersection (*e.g.* poor upper primary girls from AIDS-afflicted households) to identify their unique vulnerability. This similar to what was later termed as intracategorical complexity (Mc Call, 2005).

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[75] All personal and place names used in the text are pseudonyms.

[76] This involves being cognisant of own biases and therefore cautiously working to stop them from intervening with the analysis process.

The findings are presented according to the various aspects of educational gender inequality on which the study focussed. These were household investment in education, and children's educational achievement. However, I first describe the context of the study schools and villages.

6.4. The rural school and community context

It was noted that all the three schools employed similar pedagogical techniques. For example, the teaching was more teacher-centred than participatory. Pupils in the study schools appeared to be passive recipients of knowledge transmitted by teachers rather than active participants in the process of knowledge construction. Pupils were encouraged to be competitive and to get high scores necessary for them to pass the Primary Leaving Examinations (PLE). Households in the study villages depended on members' labour for cultivating food, earning income, transporting produce for sale, and undertaking reproductive tasks such as childcare, nursing the sick and food preparation. Such overdependence on household labour was found to conflict with girls' education in particular. This is because of the entrenched patrilocal and virilocal norms that facilitate hegemonic masculinity thereby empowering males at the expense of females. The socio-economic impact of HIV/AIDS was commonplace in the study area. For example all 36 households that participated in the study openly admitted that they were either AIDS-afflicted or AIDS-affected households.

Although all schools were rural, they also differed from each other. Tumo primary school was the smallest with about 250 pupils and seven teachers plus a head teacher. It was one of the UPE schools where pupils were not required to pay tuition fees. However, they were expected to bring their own exercise books, pens, pencils, and money for lunch. Pupils were required to pay 2000 Uganda Shillings (US$ 1.10) for lunch. Only about 10 pupils paid for lunch and were therefore provided with maize porridge. However, sometimes the money contributed was not enough to pay the cook and pupils participated in cooking or missed the lunch altogether. The school was less crowded compared with the other two that participated in the study. Teachers were not provided with lunch and were expected to contribute money, which they found

difficult. The parents and guardians of pupils at Tumo primary school were largely subsistence farmers who depended on crop cultivation and animal rearing for food and income. Tumo was the least expensive school because pupils were only asked to pay money for lunch, which the majority never paid.

Tulo primary school was bigger in size with a pupil population of 756 and 17 teachers, plus a head teacher. It was better organised than Tumo and more prestigious according to pupils' and parents' reports. It was also located closer to the small trading centre than Tumo. Pupils were not required to pay tuition fees but they brought their own learning materials. They were also required to pay some money for building contribution. However, they were provided with lunch at no cost. The classes were crowded with pupils and desks, and there were not enough textbooks. Teachers at Tulo primary school were more comfortable because they accessed free lunch and a few of them were provided with free houses. They had a big staff room where they sat at break and lunch times unlike at Tumo where teachers used a tree shade as the staffroom. The parents and guardians of pupils at Tulo were also largely dependent on subsistence farming for food and income. Many children came to school in dirty clothing because they claimed they had no soap at home.

Tuso primary school was bigger than Tumo primary school with a pupil population of 460 (340 female and 120 male). It was strange that more girls than boys were enrolled in this private school but efforts to establish the reasons were fruitless. There were thirteen teachers and a head teacher. Most classrooms were overcrowded with pupils and desks. They had no shutters and the floors were dusty. Tuso was a private school and pupils in upper classes (5-7) were required to pay tuition fees of Uganda Shillings 40,000 (about US$ 22) per school term (three months), whereas the rest (1-4) paid 30, 000 (US$16.50). There were no textbooks for pupils and very few for teachers. Pupils were expected to carry their own learning materials but were provided with lunch at school. Tuso primary school was bordering the trading centre and the health centre. The parents and guardians of pupils at Tuso were mainly small-scale traders and salaried employees. Some of them worked as teachers in various schools, or had small jobs in the centre and at the health centre. A small minority depended on

subsistence farming. Most subsistence farming households that had pupils at Tulo were the least AIDS-afflicted and the most successful subsistence farmers that owned bigger chunks of land and animals than ordinary community members. In other words, Tuso was a school for the economically better-off households. Sending children to Tuso was a source of prestige for parents in the study villages. There was a general belief in the community that pupils in that school learned more and passed PLE better than those in UPE schools. This might suggest that pupils in the private school had fewer livelihood-related issues and therefore less conflict with teachers.

6.5. Rural household investment in UPE: Economic disadvantage, AIDS affliction, age and gender

By looking at investment in education the study focussed on household ability to invest resources in terms of time and money into the education of children of different sexes. Investment of time requires ensuring that household tasks and activities did not conflict with children's school attendance. Investment of money implies provision of access to the necessary school requirements including exercise books, pens, lunch, and clothing and in some cases cash. The research revealed that there were gender inequalities in pupils' school attendance, access to learning materials and lunch, which were largely attributed to various issues within the different households.

For example gender differences in school attendance were shaped by pupils' socio-economic status. The distinction was very obvious in the comparison between UPE pupils and private school pupils. Analysis of the observations made in the private school shows that irregular attendance was less pronounced because households depended less on subsistence farming. They had extra sources of monthly income and could more easily provide school requirements and other essential necessities. It was reported that pupils who had no learning materials sometimes preferred to stay at home because they were often punished by teachers who thought such pupils were naughty. Pupils enrolled in UPE schools on the other hand came from poorer households that depended on subsistence farming for survival. Girls from such households were more prone to missing school to supplement

household labour during the busy seasons of planting, weeding and harvesting. In addition, most children who were affected and made vulnerable by HIV/AIDS and therefore had compounded economic disadvantage went to UPE schools.

There was gender-biased division of labour within most households that participated in the study. Girls were required to undertake many more tasks in the household compared with boys. Some parents/guardians also recognised that gender imbalances in household division affected girls and boys differently. Within households less dependent on subsistence farming, it was considered to have a meagre impact on girls because the household tasks were fewer. For example, a girl whose parent/guardian owned a shop in the small trading centre or worked as a teacher was spared working in the gardens during school days. Many private school pupils came from such households that were more economically and food secure. In addition, even pupils who came from poorer households were either always given priority or had external financial support from relatives in Luweero town or Kampala city. In UPE schools, gender differences in school attendance were very common due to either demand for girls' domestic labour or lack of materials and other requirements. Children affected and made vulnerable by HIV/AIDS faced even deeper economic disadvantage. Many UPE pupils who had lost parents or whose parents were sick or came from households hosting orphans missed school for various reasons. Girls from such households had an increased burden in terms of demand for domestic labour. Attending school or accessing necessary materials was problematic. Within the private school, parental loss was less pronounced. For example, only three out of the 16 orphans who participated in FGDs at Tuso primary school had lost both parents. At Tulo primary school, 16 out of 28 orphans had lost both parents.

Gender differences in household investment in pupils' schooling and the ensuing differences in pupils' school attendance or access to materials appeared at face value to be caused by their socio-economic status. However, deeper synthesis shows multiple intersections of gender, socio-economic status and age or between patriarchy and

economic disadvantage as systems of subordination. My observations[77] in box 6.1 illustrate that the causes of gender differences in time invested in schooling were intersectional by nature.

Box 6.1. Jane: Age and economic disadvantage.

Jane was a P.6 [primary/class 6] pupil at Tulo primary school who missed school several days because she had to go to request for money from her uncle on behalf of her family. The father was a polygamist with two wives, Jane's mother (Nantongo) being the second. She was a typical housewife whose household survived on subsistence farming. She had four children – two girls and two boys, Jane being the first-born aged 11 years. She also hosted an orphan (her late sister's daughter). I noted that Jane sometimes came to school late and usually missed school. Her home was on the road to the school and Nantongo was one of my contacts in the village. I usually passed Nantongo's house whenever I saw her door open to fill some gaps in the data collected in the village or just to greet them. Below is a compilation of what I noted in my notebook about a particular event of Jane's school attendance in one week.

Tuesday, 10 October 2004 (Tulo): Today I passed Nantongo's place. She was not happy about Jane. She sent Jane to her brother who works as a teacher in Nakeseke to ask for financial assistance last Saturday. Jane was expected back on Monday (yesterday) since it was a public holiday [Uganda's Independence Day celebration]. Today she missed school and Nantongo is not happy. She thinks Jane is deliberately being delayed by the uncle. She sounds desperate for Jane to return because she is stuck without soap, salt and other school requirements. She was also planning to go to Kampala to see some relatives who had promised her some help (money) in the weekend and needs money for transport. I inquired about the husband's opinion

[77] Observational notes at Tulo, October 2004.

about what could have happened to Jane. Nantongo said the husband had to spend the week with the first wife and has no idea what is happening.

Wednesday, 11 October 2004 (Tulo): Went to see Nantongo and Jane had not yet returned from Nakaseke. I offered Nantongo the use of my cell phone to call her brother's school. Unfortunately, the head teacher's cell phone was off [possibly due to poor telephone network]. Nantongo was quite sure that her brother was still holding up Jane as he mobilised some money for her. I felt a bit uncomfortable since no body knew for sure whether she had reached safely. Nantongo brushed my fears aside and mentioned that it was not the first time Jane went alone to visit the uncle and came back safely. I was actually surprised that she did not think that there could be a problem. She sounded more 'impatient' than 'worried'.

Thursday, 12 October 2004 (Tulo): When I reached the P.6 class at 09:30h, I found Jane in class. I later asked her about her visit and she explained how her uncle failed to raise any money for them. He first told her to stay until Tuesday. A colleague had promised him some money on Tuesday but things did not turn out as expected. He told Jane to wait until next week but she said she had to inform the mother about it and perhaps go back in the weekend. She came back home yesterday [Wednesday] evening with NOTHING! I wondered how disappointed Nantongo must have been, knowing how desperate she was to get money.

The above record is an example of the intersectionality of gender, socio-economic status and age. Jane's school attendance was affected by the economic status of her household. The fact that they had no essential commodities at home and school learning materials prompted her mother to seek help from the brother (Jane's uncle). Jane was selected to go because she was the oldest of the children. The gender in this case did not matter so much as the age. If the brother had been older than her, perhaps he would have been sent instead of Jane.

Note that Jane's brother of 9 years was attending the private school, which was much more expensive. Nantongo's explanation for this was that the private school was not that expensive for lower primary. For that reason, she could not afford to send Jane to the private school as well. Sending the younger brother to a private school and Jane to the UPE school can be interpreted as discriminatory. This is especially so in a context where sending a child to a private school is a source of prestige. It has already been noted that her irregular attendance was a result of economic disadvantage. Although the family was so poor that they sometimes had no essential necessities like soap and salt, Jane's younger brother was sent to the private school because he was in a lower class. Since he had to pay tuition fees, Nantongo was always compelled to give him first priority to access resources and therefore avoid missing school. Jane could wait because her school was closer to home and free of charge. Nantongo denied the fact that she perhaps attached more importance to the son's education compared with that of Jane. It emerged that sending children to a private school was a status symbol within this village. Some parents strived to send at least one of their children to the private school to earn some prestige. Such a practice may further weaken the economic position of poor households thereby creating deeper disadvantage for children enrolled in UPE schools. In addition to economic disadvantage, the irregularity of Jane's school attendance was also due to her gender. In cases of emergency such as illness, Jane was required to stay at home. During the planting season, she was often asked to accompany the mother to the garden. The findings were similar to those of past research about the education of girls in rural areas (*e.g.* Leggett, 2005). Ames (2005) found out that in rural Peru girls' daily lives intricately intersected with school. Just as in rural Uganda, discrimination against girls in terms of division of labour worsened as they grew older. The findings suggest that multiple intersections between the identities of gender and age in addition to those between the dimension of socio-economic status (class/wealth) and patriarchy can be given as further explanations for gender inequality in school attendance. Synthesis of the research data shows that HIV/AIDS plays a significant role in fortifying the nature of intersectionality.

6.6. Educational achievement: Economic disadvantage, AIDS affliction, age, gender, and patriarchy

Educational achievement in this chapter is categorised into academic competence and primary school pupils' survival or completion.

6.6.1. Academic competence

Academic competence in this chapter refers to skills, behaviours, and acts that facilitate academic performance and the ensuing educational achievement, or how much a pupil actually learns measured by mastery of reading, writing, and mathematical skills. Academic performance reflects variations in grades or scores and is a quantitative measure of academic competence. Qualitative measures include indicators of pupils' abilities to read and write, participate in the classroom activities and exhibit attitudes necessary for excellent performance. Academic competence therefore measures cognitive skills in addition to pupils' classroom participation including involvement in written exercises and oral questioning and answering (Kakuru *et al.*, 2006a). Several factors were found to be responsible for gender differences in pupils' academic competence. These were both school-specific and household factors. The school-specific factors included classroom interaction, teacher deployment and teacher competence (Kakuru *et al.*, 2006a, b).

In the process of classroom interaction pupils and teachers acted in ways that contributed to inequality. For example it was noted that corporal punishment and negative verbal feedback affected pupils' interaction with teachers and with each other in class. Boys received more negative feedback from teachers because they responded to teachers' questions more often than girls did. However, boys also reacted more positively to the negative feedback than girls. Such positive reactions included attempts to work harder in order to avoid negative feedback and corporal punishment. Girls on the other hand reacted by refraining from classroom participation, which had negative consequences on their academic achievement. The situation was not helped by the overcrowding that characterised most UPE classrooms. Teachers had very limited possibilities to discover pupils' avoidance behaviour under such circumstances. The differences in

academic competences seemed to be gender based. However, a deeper perspective of other aspects of pupils' identities reveals inherent intersections. The influence of patriarchy and masculine hegemony cannot be ignored. In the study area, girls were usually socialised into being the more reserved and subservient whereas boys were expected to be assertive and resilient. The effects of patriarchal socialisation could perhaps be linked to the classroom interaction process and associated consequences for academic competencies.

Gender differences in classroom participation were much less noticeable in lower primary (classes 1-4) compared with upper primary school classes (5-7). According to teachers, younger girls' interaction was more spontaneous and hardly affected their academic performance. Synthesis of findings reveals that younger girls were considered by teachers to be less conscious of the cultural values and expectations for them to be more reserved and subservient. Age was therefore one of the background factors that rendered girls vulnerable to unequal treatment and opportunity also known as discrimination. Variations in age among children are related to level of education. There were younger pupils in lower classes and older pupils (in upper classes but not yet adults). For example, lower primary pupils were rarely sent back home due to lack of exercise books unlike those in upper primary.

Within all schools that participated in the study, female teachers were concentrated in lower classes and male teachers in upper classes. At Tulo primary school, for example, ten out of the seventeen teachers (including the head) were female. However, only two female teachers taught in P.5-P.7 classes and there were no male teachers in lower classes. At Tumo primary school, three out of seven teachers were female and taught lower classes. One female teacher taught religious studies in class seven. None of the male teachers taught lower primary classes. The gender-biased teacher deployment among various classes possibly contributes to gender differences in pupils' classroom interaction and associated consequences. Coalition (2005) identified lack of female teachers as a key factor affecting girls' education in rural Kenya. In the same study, some teachers' opinions undermined girls' learning. The findings of this research also demonstrate that in contexts where the majority of upper primary teachers are male, the intersection between

teachers' negative opinions and other disempowering dynamics will continue to boost gender inequalities.

Lack of adequate teacher competence to work in the context of great HIV/AIDS impact on rural households was also identified as a factor enhancing the persistence of gender inequalities particularly in UPE schools. Synthesis of observation, conversation and discussion data revealed that teachers in UPE schools lacked necessary competencies to promote gender equality. For example, they did not recognise the effect of HIV/AIDS on pupils' access to learning materials. Some pupils who had been affected or made vulnerable by HIV/AIDS reported that they had been punished or at least ridiculed for coming to lessons without pens, pencils or exercise books. Others complained of being punished by teachers for arriving late or missing school without attempting to understand such pupils' circumstances. It emerged that more girls than boys were culprits of tardiness and missing school because of the patriarchal community culture wherein all household roles are gendered. Teacher competence to teach in a context where many pupils suffered consequences of losing parents or living in households with a sick member were thus inadequate. The school culture in which corporal punishment was used as a disciplinary measure further reinforced teacher incompetence in this particular context. It was observed and reported that corporal punishment was a common practice in both the school and home environments. Corporal punishment arising from lack of materials at school was largely attributed to poverty and its reinforcement by AIDS affliction. It facilitated pupils' rights violations within schools.

Household factors responsible for gender differences in academic competence include gender-biased division of labour and resource allocation. In addition, there were wider disempowering dynamics that shaped the context within which household *de facto* discrimination occurred. These include patriarchy, economic disadvantage, age and HIV/AIDS. Lack of learning materials was more pronounced among girls than boys due to unequal access to income. Age was influential since pupils in upper primary needed more exercise books because they had more subjects. Lower primary pupils (P.1-P2) used wooden boards and chalk, P.3 and P.4 required less materials and teachers were more flexible as the demands of having to prepare for PLE were less

strenuous than P.5-P.7. In addition, teachers were more strict with upper primary children in the bid to get them well-prepared for passing the PLE. Girls in upper primary were also allocated more tasks at home than their younger sibling. Such upper primary girls who belonged to AIDS afflicted and affected households were of course uniquely discriminated against because they suffered greater impoverishment. Each category of girls was therefore uniquely subordinated according to their age, socio-economic status and AIDS affliction. In addition, the pedagogical processes and hegemonic masculinity found in schools further compounded the problem.

6.6.2. Primary school survival and completion

Survival in this chapter refers to the persistence of pupils in the school system (MoES, 2004). It was revealed that although gender differences in pupil attrition in UPE schools had declined, they were not yet completely eradicated. The commonest cause of dropping out for girls was pregnancy and subsequent marriage, while for boys it was the temptation to work or to earn income. Some boys begun to work for money after school or in the weekends but later got tempted to miss school and finally dropped out. Sometimes it was possible to convince such boys to re-enrol especially if they did not migrate to urban centres. Some boys kept one foot in class and another out, but finally managed to complete the primary cycle. Teenage pregnancy however automatically resulted in dropping out. While pregnancy may appear to be a gender issue, the study revealed that gender deeply intersects with economic disadvantage and age because girls in upper primary are tempted to engage in sexual relations as a survival strategy. The following excerpts about lack of shoes were typical of many talks about pregnancy.

> *"We as parents try to give children equal opportunities but girls get spoilt easily. Girls of these days don't have patience. They want to have shoes and nice clothes. That's why I think girls need to study when they are still young. We have children here who are 16 years and are still in primary schools. They meet many men on the way who disturb [seduce] them. Our children get spoilt because they delay in primary schools yet they have no patience. They lose hope quickly and think that*

> *the easy means for them to have shoes is through accepting money from someone. All mothers are worried because girls don't listen."*[78]
>
> *"Some children are proud and abuse others. Many children at school don't have shoes. Some people have shoes but don't want to wear them everyday. The few who put on shoes usually abuse us and even step on us. For example on speech day, I came and I also participated in singing but other children shouted at me saying, 'You are embarrassing us'. Moreover, some girls who were shouting at us got money to buy shoes from boyfriends. There is a girl who missed PLE exams the other year [2003] after she got pregnant; and she used to wear shoes every day."*[79]

The above excerpts show an intersection of gender, economic disadvantage and age. In rural Kenya, Coalition (2005) found out that pregnancy was a major cause of school dropout among girls in addition to AIDS affliction. The Kenyan government has put in place a re-entry program for girls who drop out due to teenage pregnancy. Atekyereza (2001) found out that in 1998– one year after the implementation of UPE– 60 girls in Uganda's Luweero district dropped out of school due to pregnancy. In the study villages, it emerged that girls' vulnerability to teenage pregnancy was largely related to the poverty situation. Moreover, economic disadvantage was sometimes compounded by AIDS affliction. Children affected and made vulnerable by HIV/AIDS were highly at risk of adolescent pregnancy and school drop out.

Apart from pregnancy, economic disadvantage can easily reinforce networks with the effects of AIDS affliction to cause dropout. For example Maria[80] (box 6.2) stopped schooling for a long time because she had sick relatives at home.

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[78] Conversation with a 'UPE' mother at Tumo village, October 2004.
[79] Conversation at Tulo primary school, February 2005.
[80] Observational notes.

Box 6.2. Maria: HIV/AIDS, age, gender.

Maria was a girl aged 12 years in P.6 at Tumo primary school. Her father was believed to have died of AIDS and the mother had been very ill for over 8 months. She had 2 sisters aged 6 and 7 and 2 brothers aged 10 and 14. Previously Maria and her brothers lived in Luweero town with their uncle who took care of all their school requirements. During the last school holidays in 2003, the uncle took them to their village (Tumo) to visit the mother but other relatives decided that Maria had to leave school and nurse her mother. Her brothers later went back to school in Luweero town but Maria remained at home the whole of first term when she should have gone to P.7. At first, Maria's uncle was reluctant to help her study in the village UPE school. He thought studying in a UPE school was a waste of money because pupils rarely pass. At the beginning of second term in 2004, Maria's uncle changed his mind and managed to convince other relatives to allow Maria re-enrol in the nearby UPE school. Maria went back to P.6 in the second term when she could have been in P.7.

Maria's education was disrupted by HIV/AIDS not only because she was a girl, but also because of her age, which made her capable of taking care of her mother by cultural standards. In addition, the fact that she was dependent on her uncle for financial support crippled her schooling. The findings suggest that gender equality in access to school does not necessarily imply equality in retention and completion. This is particularly so in contexts characterised by asymmetrical gender relations, economic disadvantage, and HIV/AIDS impact.

6.7. Network of intersections: Socio-economic status, AIDS affliction, gender and age

I have already noted that gender inequality in pupils' school attendance, classroom participation and survival at school is a product of a network of intersections between socio-economic status, AIDS affliction, gender

and age. Each of these categories of difference feeds on the products of others to yield inequalities. The more intersections a pupil faces, the more vulnerable they are to discrimination and inequality. Analysis shows that intersections between AIDS-affliction or social economic status and any other disadvantaged position in any category can yield serious *de facto* discrimination and gender inequalities in education. That is, when AIDS affliction intersects with gender or socio-economic status, more aspects of inequalities occur. However, when age/child status intersects with gender fewer inequalities may occur because the consequences of artificial categories are escaped For example, lack of learning materials can be considered a consequence of economic disadvantage reinforced by AIDS affliction. This can produce non-attendance and poor academic competence, which may not necessarily feature in a situation where poverty and HIV/AIDS are non-existent. The above suggests that socio-economic status and AIDS affliction yield the most obstructive dynamics against educational gender equality. Efforts to address gender equality in the context of HIV/AIDS should therefore not address all girls as if they were a single category. Such over-inclusion sidetracks the would-be focus on special needs of particular categories, which is a prerequisite for counteracting the disempowering dynamics.

6. 8. Concluding remarks

This chapter highlights the nature of the various intersections that shape the background of discrimination upon which gender inequality thrives. This background included patriarchy as a system of subordination in which categories of difference-gender, age, household socio-economic status, and AIDS affliction intersected. It was revealed that these intersections shape the unique experiences of girls affected and made vulnerable by HIV/AIDS, who are normally subsumed under those of girls in general. Achievement of gender equality as an objective of UPE was formulated to address all girls as if they belong to a single category. The findings of this research revealed that there exist various categories of girls including orphans and non-orphans, younger and older, the AIDS-afflicted and non-afflicted, the poor and the less poor. Pupils who belong to more than one category are more disadvantaged than others. This implies that pupils' gender intersects with their socio-economic status, age/child status and AIDS affliction

to hinder gender equality in UPE. Measures aimed at achieving gender equality in UPE should therefore not only broadly target girls as a single category but rather include specific interventions for those subordinated in particular ways. For example, funds could be mobilised to provide lunch and exercise books for all children while at school. Furthermore, counselling programs for children affected and made vulnerable by HIV/AIDS could be implemented in all schools but due to the intersectionality of the dimensions discussed, gender, childhood and AIDS-affliction should be emphasised. Financial support could also be extended to households hosting orphans in such poor communities. This will help to avoid subsuming the unique experiences of girls affected and made vulnerable by HIV/AIDS under those of girls in general. Hence, an intersectional perspective of the nature of gender inequalities is required in order to devise lasting effective interventions. The suggestions for future research could be in the area of how best to devise such interventions without necessarily causing further direct or *de facto* discrimination among children.

Chapter 7
General discussion and conclusions

7.1. Introduction

This chapter presents the general discussion and conclusions of the study as a follow-up on the general synthesis of the major research findings presented in Chapter 6. The chapter has two major sections. The first part gives a summary of the empirical findings with regard to main themes and objectives of the study. The second part discusses policy implications and directions for future research.

7.2. Summary of the field findings

The research sought to understand the reasons for the persistence of gender inequalities in Universal Primary Education (UPE) even after deliberate measures had been put in place to address them. This research was designed to take a balanced perspective of how inequalities endure due to the complex interaction between school and structural processes. I specifically focussed on how the persistence of educational gender inequalities is influenced by individuals' pathways in response to the socio-economic impact of HIV/AIDS on their livelihoods. Note that the study centred on AIDS-afflicted and affected households in a rural setting. The research objectives focussed on issues relating to the impact of HIV/AIDS on household investment in education and teacher competence to promote gender equality. The impact of HIV/AIDS was also analysed in relation to other school-specific factors such as classroom interaction and children's educational rights. Lastly, I advocate for the need to take an intersectional perspective for better understanding and elimination of gender equalities in UPE.

7.2.1. HIV/AIDS and household investment in education

The first objective of the study was to establish how the effect of HIV/AIDS on the livelihoods of rural households conflicts with investment in girls' education. In Chapter 2, I discuss issues relating to the above

objective (1). The findings revealed that HIV/AIDS had depleted household members' access to livelihood assets particularly financial capital and human capital. This is due to the entrenchment of AIDS-induced poverty and AIDS orphanhood. It is well acknowledged that people in the study villages were already poor even before the onset of HIV/AIDS. However, judging from the life stories and other data collected, I noticed that HIV/AIDS has indeed added fuel to the fire. This fire does not stop burning at the household level but its impact is felt in all aspects of the society. The situation is not helped by the endurance of unequal power relations. The societal norms, values, beliefs, practices and patterns maintain a gendered household division of labour, decision-making and resource allocation. This gendered nature of social life silently influences individuals' pathways in response to HIV/AIDS impact. Synthesis of the data shows that people's pathways in rural Uganda are not compatible with equality in general and girls' schooling in particular. For example, because households in the rural villages where the study was conducted have lost productive labour due to illness and death, they are stressed with poor agricultural production and the associated food and income insecurity. The issue of how rural household responses or individual, gendered pathways to AIDS-related livelihood stress counteract the struggle for gender equality is the contribution of Chapter 2 of this thesis to existing knowledge.

One of the things poor people do is to increase children's participation in agricultural tasks and homecare provision. It emerged that before serious AIDS-related stress, children got involved in cropping activities only in weekends and sometimes in the evenings or after school. Today, many children have to work in crop gardens every day before they go to school. The problem is worsened by unequal positions occupied by boys and girls in society. Whereas boys can easily refuse to undertake these activities and get away with it, this is extremely difficult for girls because of how they are socialised – to be more subservient and disciplined than boys. In rural households where children do not have to work in gardens before school, at least they have to fetch water or take part in other household chores such as cleaning the homestead. Again, boys are at liberty to get out of bed and run to school unlike girls. Girls reported that it was difficult for them to just leave their mothers without water or in a dirty house and

run to school. This explains why girls usually arrive later at school than boys or participate less in classroom activities because they are exceptionally fatigued. The lack of enough labour in AIDS-afflicted households suggests that their capacity to invest enough time in girls' schooling was further diminished.

Household involvement of children in income-earning activities for educational needs was another way of responding to the AIDS impact. It was noted that children – especially boys – had been trying to make their own money even before HIV/AIDS impact became obvious. However, many children said that before they lost parents, such money would be spent on buying clothes, shoes and other personal needs because parents normally provided exercise books and other school materials. Today, households have more urgent needs relating to food and medicine. Learning materials are the last on the list of priorities, yet children are punished when they go to school without them. Although boys have freedom to work and earn money, girls are confined in the household to undertake domestic and productive tasks. This implies that there is unequal access to not only to activities but also income for educational needs. These differences are more pronounced in upper school classes where more materials are required. Girls' pathways in the study villages include increased exchange of sex for gifts and money for educational and other needs. The result is pregnancy-related school dropouts. Households have therefore reduced investment in education in response to AIDS-related poverty and orphanhood. This reduction in time and money invested in education serves to help them cope with livelihood needs but facilitates the continuity of a vicious cycle of HIV/AIDS and gender inequalities. In sum, gendered livelihood pathways in the context of HIV/AIDS and unequal power relations facilitate the endurance of gender inequalities.

7.2.2. Gender inequality, HIV/AIDS and teacher competence

The second objective was to find out how rural household responses to the impact of HIV/AIDS affected teacher competence to promote gender equality. The findings reported in Chapter 3 show that AIDS-related livelihood stress interferes with teacher competence. Pupils in the context of HIV/AIDS face many livelihood problems including lack of learning materials, lunch, clothes, parents, and a favourable

school environment. Some children affected and made vulnerable by HIV/AIDS are required to miss school often, or arrive later at school. Some are compelled to go without learning materials. Others have only the evening meal at home because breakfast is not a norm in their households and there is no lunch at school. However, teachers seem not to be aware of, or choose to ignore the situations in pupils' households. They expect all children to be at the right place at the right time doing the right thing. Pupils in UPE schools complained about corporal punishment by teachers due to lack of materials or poor performance in classroom exercises. The question is whether teachers have the necessary competencies to promote gender equality in the context of HIV/AIDS. Synthesis of field data revealed a need to develop certain core competences for primary school teachers in light of the HIV/AIDS impact and this forms the major contribution of Chapter 3 to the existing body of knowledge. Five competencies specifically identified in this research are gender competence, AIDS competence, interpersonal competence, pedagogical competence, subject matter knowledge, and methodological competence. Gender and AIDS competence seem to require stronger efforts in their development than interpersonal, pedagogical and subject matter knowledge, which perhaps already minimally exist but need further tightening and attention. Development of the identified competencies could be possible through putting in place job profiles for teachers to align teacher development, and performance standards with school and contextual needs. Reforming teacher education and improving the working conditions for primary teachers could also enhance the development of desired competencies.

7.2.3. HIV/AIDS and school-specific factors

The third objective was to identify other school-related factors that hinder gender equality in the context of HIV/AIDS. These were identified as classroom interaction and children's educational rights.

7.2.3.1. Rural classroom interaction and pupils' academic competencies

The significance of HIV/AIDS to classroom interaction and gender inequalities in pupils' academic competencies is addressed in Chapter 4.

The thesis shows how the impact of HIV/AIDS on rural livelihoods helps to perpetuate the gendered nature of classroom interaction and pupils' academic competencies. The research findings revealed two types of classroom interaction. There was teacher-pupil interaction and pupil-pupil interaction. It emerged that pupils' livelihood pathways contributed to the gendered nature of teacher-pupil interaction. For example, girls were more silent in class due to the gendered nature of household division of labour, worsened by HIV/AIDS impact. They were more absent, late and blamed than boys. They missed school more than boys did, which could havemade them more silent in class. This might have contributed to teachers' allocation of more talking-time to boys because girls' visibility was diminished Additionally, the study revealed gendered responses to teacher-pupil feedback. For example, boys received more negative verbal feedback, which they used positively to improve their grades. Girls on the other hand refrained from verbal exchange in class as a strategy for avoiding negative feedback and punishment.

Regarding pupil-pupil interaction, two types were identified. Whole-class casual interaction, which I considered easy to identify and correct – where necessary – was more characteristic of boys. Small-group hidden behaviour, more difficult to identify and correct was more characteristic of girls. The impact of HIV/AIDS on classroom participation and pupils' competences in general was negative. For example, HIV/AIDS is analysed as intensifying gender differences in school attendance due to the multiplication of demand for girls' labour in the household. This affects their academic competencies and prompts negative feedback from teachers. Girls responded by taking a peripheral position in the classroom. In this thesis, gendered classroom interaction was therefore analysed as being influenced by factors external to the classroom including HIV/AIDS' impact on rural household livelihoods.

7.2.3.2. Children's educational rights

This thesis addresses children's educational rights in Chapter 5. In this chapter, gender equality is perceived as equality of capabilities to enjoy rights entitlements in education drawing on the capabilities approach (Sen, 1980, 1992, 1999, Nussbaum, 2000). The chapter discusses how

gender inequality in pupils' capabilities to enjoy educational rights accrues from the impact of HIV/AIDS on their livelihoods.

Capabilities are what individuals are able to do and to be. For pupils, these include school attendance, participation and completion. The impact of HIV/AIDS deprived pupils the capabilities not only to attend and complete primary schooling but also to access learning requirements such as exercise books, pens, pencils, clothing, and lunch. As already noted, HIV/AIDS intensifies the growth of poverty thereby reducing affordability of educational requirements for pupils. The findings also show that HIV/AIDS negatively affects pupils' educational accessibility. Increasing demand for household labour due to creation of more tasks, has expanded inequalities in school attendance. It was revealed that the quality of education demands urgent attention. One of the schools lacked water and enough toilet facilities. In general, teachers' motivation was low; there were no meals, adequate textbooks, furniture or other instructional materials. Additionally, it emerged that HIV/AIDS contributes to the deprivation of rights to acceptable education. Pupils were subjected to corporal punishment for example if they arrived late or had no learning materials. Many 'culprits' of lack of materials and tardiness were pupils from AIDS-afflicted households, moreover girls. Worse still, it appeared that sexual harassment in schools was still happening. More boys than girls in UPE schools suffer the above-mentioned mishaps because of the entrenchment of unequal power relations in society. The findings therefore show that children's capabilities to enjoy acceptable education continue to be deprived. Apart from acceptability, the ability of schools to adapt their procedures to pupils needs is unsatisfactory. Despite the changes in the primary school curriculum, the findings show a need to equip pupils with competencies to participate in life. In addition, there seems to be no solution to the problem of pregnancy as a cause of dropping out. This exclusively affects girls and is partly attributable to AIDS-induced poverty, which compels them to engage in sexual relations for financial and material gains. This thesis therefore adds to the existing knowledge by showing that the capabilities of children to enjoy educational rights stipulated by Tomasevski (2001, 2003, 2006) are yet to be fully fulfilled. The contribution of HIV/AIDS to the deprivation cannot be overemphasised.

7.2.4. Intersectionality: Gender inequality and HIV/AIDS

The fourth objective of this research was to propose a framework for understanding the persistence of gender inequalities in UPE and the results are reported in Chapter 6. Chapter 6 is therefore a synthesis of the findings of the previous Chapters (2, 3, 4 and 5) in an attempt to propose a framework for better understanding of inequalities. I emphasise the need to refocus our perceptions in the bid to strengthen the combat for gender equality. Rather than look at gender equality in terms of numbers (or how many children of each sex are enrolled or attend school regularly), it is important to look at it as a human rights issue as I elaborated in Chapter 4. I regard gender equality as the provision of equal treatment and opportunity in all aspects of life. Hence, gender equality includes the achievement of equal opportunities to school attendance, learning and educational attainment (Colclough, 2004; Aikman & Unterhalter, 2005; Subrahamanian, 2005). This thesis acknowledges the contribution of human diversity and conflict to the endurance of inequality. Drawing on Crenshaw's metaphor of the intersectional accident (Crenshaw, 1991, 1994, 2000), I articulate a conceptual space within which better understanding of the specific contours of gender equality can be situated. I highlight the various intersections upon which inequality survives. These are either between systems of discrimination such as patriarchy and economic disadvantage, or between categories of difference such as gender, class, age, and AIDS affliction. Others[81] are ethnicity, geographical location, and religion. There is a web of household and individual pathways in response to HIV/AIDS based on these categories. I argue that HIV/AIDS impact in this study is fundamental since it strengthens intersectionality through creating more categories of marginalised groups and a denser network of pathways detrimental to the achievement of gender equality. HIV/AIDS magnifies the negative effects of intersectionality on *de facto* discrimination. It was revealed that the unique experiences of girls affected and made vulnerable by HIV/AIDS are usually subsumed under those of girls in general implying that no special recognition of their plight is made. In the

[81] Not necessarily relevant for this research.

context of HIV/AIDS, this is most undesirable because it frustrates the struggle to provide equality of treatment and opportunities.

7.3. Conclusions

The answer to the question of whether or not HIV/AIDS contributes to the persistence of inequalities in UPE is affirmative. However, note that HIV/AIDS reinforces existing structural hindrances to equality. In other words, even if there were to be no HIV/AIDS, inequalities would probably still exist. However, the magnitude would differ and the existing gender equality measures would have more likely than not had a more positive effect. It should be noted that it is quite difficult to isolate the impact of HIV/AIDS on gender inequalities from that of other hindrances. Nevertheless, the contribution of HIV/AIDS is considerable enough to warrant urgent action. There is therefore need for stronger mechanisms to mitigate the impact of HIV/AIDS on rural livelihoods. This could include scaling up access, and enhancing adherence to Antiretroviral Therapy in rural areas to help restore people's reproductive capacity. Additionally, measures to address the specific needs of children affected and made vulnerable by HIV/AIDS would go a long way in reducing the effects of AIDS on lack of materials and lunch at school. Such measures for example could include provision of free learning materials and lunch for all children in UPE schools. Furthermore, measures to achieve more balanced power relations at the household level are desirable. This is because HIV/AIDS impact exploits these relations to benefit boys at the expense of girls. I would propose the establishment as well as strengthening of a legal framework to eliminate all forms of *de facto* discrimination. The current legislation against inequality has not yet brought about significant changes specifically at the household level where most *de facto* discrimination occurs. The constitution of the republic of Uganda for example, seems to address *de jure* discrimination while ignoring the *de facto* discrimination. Such *de facto* discrimination forms a big chunk of the foundation for unequal gender relations that extend to the educational processes. The directions for future research could therefore be in the area of how best to provide legislation against all forms of *de facto* discrimination that underlie educational gender inequality.

The findings also show that the impact of HIV/AIDS on rural livelihoods reflects negatively on teacher competence to promote gender equality. This is because individual pupils' and parents develop pathways of dealing with HIV/AIDS that are unacceptable according to teachers' orientation. The current Primary Teacher Education Curriculum (PTE) was not designed to take into consideration the interface between HIV/AIDS and pupils' livelihoods. It is therefore important to reform teacher education in line with teacher job profiles and qualification structure. This would require Uganda's Ministry of Education and relevant departments to develop and constantly update primary school teacher profiles aimed at alleviating gender inequalities. More reforms could also target facilitating teachers to adjust, integrate and situate their professional knowledge in the teaching context. The approach to education could also be gradually modified from serving instrumentalist to emancipatory goals in the long run so that children are not encouraged to score highly at the expense of their ability to participate in knowledge creation and ownership.

Furthermore, the basic conditions under which primary school teachers work should be improved to enhance their motivation as well as competencies in specific areas. This is in line with Maslow's (1970) arguments about the 'need hierarchy'. Unless teachers' needs are fulfilled, their motivation may remain low implying that even developing their competence could be more complex. Enhancing and developing teacher competencies should include mechanisms for improving their motivation to apply them. This could be in the form of incentives ranging from increased salaries to free housing, medical care especially in rural areas. The direction for future research could be in developing teachers' job profiles to facilitate the process of enhancement of their competencies.

The findings show that HIV/AIDS intensifies gender differences in classroom interaction and the associated academic competencies. Although measures have been put in place to improve participation of girls in the classroom, it appears that their impact is still low. This is not helped by the existence of structural hindrances in the school context. It is therefore important to scale up and strengthen measures to empower girls and improve their self-esteem, in addition to mitigating the impact of HIV/AIDS on their livelihoods. The low

levels of transition to secondary education also need to be addressed. This actually shows that academic competence is not enough. There is need to combine the combat for gender equality with that of equipping pupils – girls and boys – with competencies to participate in their livelihoods. The direction for future research could therefore be in the area of how best to make this type of combination.

The research revealed that gender differences in children's capabilities to enjoy educational rights are a result of a conflict between poverty and education. This poverty is intensified by the impact of HIV/AIDS on the livelihoods of rural households. The creation of more tasks and disruption of living arrangements moreover in the context of unequal relations imply that the education of more rural girls than boys will suffer. Colclough *et al.* (2000) attribute the persistence of inequalities to cultural practices. Cultural practices of course include unequal access to resources. Inequalities in resources can be strong foundations upon which other inequalities for example in capabilities can build (Agarwal, 2004; Robeyns, 2003). However, the findings of this study also add that overdependence on household labour as an attribute of poverty makes a considerable contribution. I therefore concur with Buetel & Axinn (2002) that transforming society in ways capable of reducing overdependency on household labour could promote equality. It would reduce the effect of gendered household division of labour on education. More so, gender inequalities in rural children's capabilities to attend and participate in school activities would significantly improve. The findings show that the directions for future research could be in the area of how best to achieve social change for purposes of enhancing educational attainment and pupils' enjoyment of their educational rights.

Since there are various intersections forming the background of discrimination upon which inequality thrives, the struggle for gender equality should not focus on developing and implementing measures which target girls or boys in general as though they were single category but rather include specific interventions for those subordinated in particular ways. This will help to address the unique experiences of children affected and made vulnerable by HIV/AIDS according to the magnitude of their affliction. Such measures could include school-based counselling programs for children affected and made

vulnerable by HIV/AIDS. In addition, provision of lunch and exercise books for all children enrolled in UPE could help to counteract *de facto* discrimination in the allocation of household resources and activities. Financial support could also be extended to households hosting a certain minimum number of orphans in such poor rural communities. The suggestions for future research could be in the area of how best to devise such interventions without necessarily causing further discrimination among vulnerable children.

This thesis draws a picture of a reality that is certainly not limited to the study schools or to Uganda. Many children and households in resource-poor countries affected by HIV and AIDS may suffer similar challenges. Small changes such as adjusting the school time-table may have big effects particularly if they are developed and implemented in a collaborative partnership between schools and their communities. It is important to develop and implement necessary changes capable of providing lasting solutions that are shared by parents, teachers, school authorities, community leaders and pupils. Such would necessitate involving all these actors in the development and implementation of the required strategies. The Ministry of Education could perhaps commission a study to investigate the best ways in which to develop partnership with schools and communities aimed at drawing possible realistic and feasible responses to HIV/AIDS impact on the education sector in general and gender inequality in particular.

In this thesis, I have only been able to discuss the persistence of gender inequalities by focusing on AIDS-afflicted and affected households. I discuss how livelihood pathways intervene with household investment of time and money into girls' schooling. I also highlight how AIDS-related livelihood pathways negate teacher competence, classroom interaction, and children's rights enjoyment thereby perpetuating the entrenchment of gender inequalities. Gender inequalities therefore do not stem from a single factor in isolation, but rather from an intersection of various systems and identities in which pupils' livelihoods are realised. Hence, if we want to understand the persistence of gender inequalities in the context of HIV/AIDS, indeed the key word is intersectionality. Additionally, I argue that if we focus on counteracting the negative effect of rural livelihood pathways, we are likely to win *the combat for gender equality*.

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Annex I: Location and profile of Luweero district

Luweero is located in central Uganda, north of Kampala – the capital city. Luweero became a district in 1997 after it was cut off from Nakasongola district. In the early 1980's up to 1986, Luweero was the centre of Uganda's liberation war between the National Resistance Army (NRA) guerrillas and the Tito Okello and Milton Obote governments. The war led to death of many people and paralysed the local demographic and economic trends thereby providing a perfect breeding ground for HIV/AIDS. However, since 1986, the situation in the district has been improving greatly.

Figure A.1. Map showing the location of Uganda and Luweero District.

Annex II: Uganda country profile

History	**Uganda**
Background:	Uganda achieved independence from UK in 1962. Experienced political instability between 1970 and 1985, which led to serious economic decline. There was brain drain, breakdown of infrastructure and poor social service delivery. The process of economic recovery begun in 1986 to restore financial stability and general rehabilitation of the country's productive and social infrastructure. Uganda is one of the countries that have made significant strides towards preventing the spread of HIV/AIDS.
Geography	**Uganda**
Location:	Across the equator in East Africa, west of Kenya and south of Sudan; bordering Rwanda, Tanzania and Democratic Republic of Congo. Uganda is land locked.
Area:	236,040 square kilometres
Climate:	Tropical; generally rainy with two dry seasons
People	**Uganda**
Population:	24.4 million (by 2002)
Population growth rate:	3.3%
Population Density:	124 persons per square kilometre
Sex Ratio:	95 males per 100 females
Children below 18 years:	56%
HIV adult prevalence rate:	4.1%
Ethnic groups:	Include Acholi, Alur, Banyankole, Baganda, Bagisu, Bagwere, Bakiga, Bakonjo, Basoga, Batoro, Bunyoro, Bunyoro, Iteso, Jopodhola, Karamojong, Langi, Lugbara, Rundi, and Rwandese
Languages:	Official language is English, followed by Swahili. More than 20 other languages are spoken.
Literacy Rate:	*Adult*: 68% *Males*: 76% *Females*: 61%
Government	**Uganda**
Country Name:	Republic of Uganda
Independence:	1962 (from UK)
Administrative divisions:	87 districts as of July 1 2006

Service delivery:	Decentralisation
Economy	**Uganda**
GDP:	$ 39.39 Billion (2004 est.)
GDP real growth rate:	5% (2004 est.)
GDP per Capita:	$ 1000
Household economy:	*Total number of households*: 5,126,762
	Households engaged in Agriculture: 74.8%
	Households mainly depending on subsistence farming: 68%
	Households with an informal enterprise: 7.5%
Expenditure on Education:	3.9%
Labour Force:	12.41 million (2004 est.)

Source: Adopted from CIA (2006)[82].

[82] Central Intelligence Agency (2006) World Fact book 2006. Washington DC, CIA. Available on line at: http://www.cia.gov/cia/publications/factbook/geos/ug.html. Accessed, May 28, 2006.

Annex III: Uganda's education system

Formal education in Uganda was first introduced by missionaries in the 1880s. By then the colonial Government facilitated missionary schools until 1925 when Government exercised full control over education. During the period between early 1920's and 1930's, formal education was available to children of the aristocracy, chiefs and clergy. The Castle commission of 1963 later pointed out the need to emphasise equality of education for all people, improving agriculture related education, technical education, and provision of adult education. Formal education continued being guided by the Castle commission albeit the 1971-75 manpower vacuum created by the expulsion of Asians. There was economic and political instability in the period 1981-1986, which further deteriorated education service delivery. Since the late 1980s, emphasis on educational policy has largely been on a general recovery and rehabilitation of educational facilities and man power to restore functional capacity. In 1992, the Government White Paper on Education was established in which the need for the implementation of Universal Primary Education was emphasised. The current policy of formal education is focussed on reducing inequalities in access between sexes and geographical areas through redistributing resources. consequently, more resources are being allocated to the provision of basic education as opposed to higher education. Higher education especially tertiary education is increasingly becoming liberalised.

Uganda's formal education system is composed of seven years of primary school meant for children aged between ages 6-12 years. Primary education is provided through the Universal Primary Education Program (UPE). Under UPE, parents are exempted from payment of tuition fees but remain solely responsible for the provision of other requirements such as exercise books, pens, pencils, meals, and clothing. Children who successfully complete the seven years must pass a national Primary Leaving Examination (PLE) in order to be admitted to a four-year cycle of secondary education. Upon successful completion of the four years, students sit the national/ Uganda Certificate of Education (UCE) Examination. Depending on the results, students have various options including admission to Upper secondary (A' level) education, Primary Teacher Training Colleges, Technical training institution, Business education, or dropping out.

The Advanced secondary level is a two-year cycle at the end of which students sit the national/Uganda Advanced Certificate of Education (UACE) Examinations in order to acquire admission to University education.

Table A.3. Structure of Uganda's education system.

Age	Cycle	Level	Award
22+		Higher	Post graduate degree or Diploma
19+	3-5		B.A. or BSC degree or Secondary Teacher Education or Technical and other Govt Dept. Training
13-18	2	Secondary	Advanced Level/ Uganda Advanced Certificate of Education (UACE) or Primary Teachers' College (PTC) or Technical and other Govt Dept. Training
	4		Ordinary Level /Uganda Certificate of Education(UCE)
6-12	7	Primary	Primary Leaving Examination (PLE)
3-5	3	Pre-primary	Optional

Source: Author.

Annex IV: Basic indicators 2004: study schools

	Tumo Primary School	Tulo Primary School	Tuso Primary School
No. of pupils			
Male	131	364	120
Female	119	392	340
Total	250	756	460
No. of teachers			
Male	5	9	7
Female	3	10	7
Total	8	17	14
Pupil: teacher ratio	1: 32	1: 44	1: 32
Number of classrooms	7	14	7
Estimated total income from tuition fees in 2004*	US $ 2,031 (Ug shs 3,757,500)	US $ 6,141 (Ug Shs 11,362,680)	US $ 22,378 (Ug Shs 41,400,000)

* Income fluctuates per term per school due to changes in numbers of pupils hence these are only estimates..

Annex V: HIV/AIDS situation in Uganda

The earliest cases of HIV/AIDS in Uganda were reported in Rakai district in 1982 where the spread of the disease at the time was attributed to participation in illegal trade on the shores of lake Victoria[83] and the then National Resistance Movement (NRM) guerrilla war. The political and economic breakdown of the 1970s and early 1980s heightened the poverty levels that further later enhanced the spread of HIV/AIDS[84]. Uganda is one of the countries that have had high prevalence rates of HIV/AIDS in the world in the past 20 years. However, Uganda has been able to reduce HIV prevalence from a high 29% in the early 1990s to the current 4.1%[85]. Out of Uganda's total population of about 24.4 million[86], 880,000 by the end of 2005 were estimated to be living with HIV/AIDS[87] [88]. A cumulative total of over 2 million people have been infected with HIV/AIDS and about 900,000 have died[88] Like in other affected countries, HIV/AIDS has affected the most productive age groups of the population 15-49[89] among whom it is the leading cause of death. The most tragic mode of transmission so far has been heterosexual activity, which accounts for about 84 % of the cases[89]. Others include mother to child (vertical) transmission, sharing of un-sterilised piercing instruments and traditional cultural practices like circumcision, widow cleansing and widow inheritance.

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[83] Aspaas, H.R. (1999) AIDS and orphans in Uganda: Geographical and gender interpretations of Household Resources. *The Social Sciences Journal* 36 (2), 201-226.

[84] Barnett, T. & Whiteside, A. (2002) *AIDS in the twenty-first Century: Disease and Globalisation* (New York, PALGRAVE MACMILLAN).

[85] UNAIDS (2004) *Report on the Global AIDS epidemic* (Geneva, UNAIDS).

[86] UBOS (2002) *Uganda Population and Housing Census Main Report 2002* (Kampala, Uganda Bureau of Statistics).

[87] UNAIDS/WHO (2005) *AIDS Epidemic Update: December 2005*, (Geneva, UNAIDS/WHO).

[88] UNAIDS/WHO (2005). "*3 by 5 Progress Report December 2004*", UNAIDS/WHO, Published 26th January 2005. Available online at: www.who.int/3by5/progressreport05/en/ (Accessed 10 September 2005).

[89] UAC (2003) *District Response initiative Action Research, National Synthesis Report*. (Kampala: UAC).

Despite the pandemic nature of AIDS, Uganda's national response in the past 20 years provides encouraging lessons. During the 1980s there was a slow response by Government to HIV/AIDS, which enhanced its spread from Rakai to neighbouring districts and eventually trapping the entire country. The establishment of the AIDS Control Programme (ACP) in the Ministry of Health (MoH) in 1986 marked the dawn of the first official national response to HIV/AIDS. At that time, the ACP was responsible for executing various activities related to epidemiology, surveillance, health and AIDS education, and blood transfusion services. ACP also co-ordinated the various HIV/AIDS control activities in the country. However, only the Ministry of Health was involved in HIV/AIDS activities through the ACP since AIDS was still exclusively perceived to be a health problem. Consequently, HIV/AIDS continued to spread despite the attempts to fight it. This prompted the Ugandan Government to realise the need for a multi-sectoral approach to HIV/AIDS. The national AIDS task force was later appointed to work out the modalities of a multi-sectoral AIDS control approach. This culminated into the establishment of the Uganda AIDS commission (UAC) in 1992. The UAC finally developed the multi-sectoral approach document articulating five key goals to serve as guiding principles for AIDS control activities at the national, district, organisational, and community planning levels in programme identification and resource allocation. The goals of the multi-sectoral approach are:

1. To stop the spread of HIV infection.
2. To mitigate the adverse health and socio-economic impact of HIV/AIDS epidemic.
3. To strengthen the national capacity to respond to the HIV/AIDS epidemic.
4. To establish a national information base on HIV/AIDS.
5. To strengthen the national capacity to undertake research relevant to HIV/AIDS.

As a result of the multi-sectoral approach to HIV/AIDS control, HIV/AIDS activities and programmes have been mainstreamed in all government line ministries. In addition, the decentralised nature of local governance enhances the integration of HIV/AIDS programmes into all district plans and activities. For example, there is a focal person for HIV/AIDS at all ministries, districts and lower levels. There is a national strategic framework for HIV/AIDS activities with

strategies and programmes in over 20 different areas to address the epidemic[90]. The multi-sectoral approach together with the ACP have played a fundamental role in the fight against HIV/AIDS through Information Education and Communication (IEC) activities, Prevention of mother to child transmission (PMTCT), condom promotion and distribution, Voluntary counselling and testing (VCT), and provision of care and support to HIV/AIDS patients, widows and orphans. The national response to HIV/AIDS has resulted into an overall decline in sero-prevalence rates, creation of massive awareness, reduction of stigma, increased research, expanded partnership and co-ordination, among other things. In 1997, the Uganda HIV Drug Access Initiative was launched with five accredited centres in Kampala to provide antiretroviral therapy (ART). By June 2005, the number of accredited centres had increased to 146 of which 114 provided ART to a 10,600 people[88]. In addition, Non-governmental Organisations and private treatment centres are involved in providing ART. The estimated number of people accessing ART in Uganda by June 2005 was 63,896 of which 10,600 received free treatment from the ministry of health. Nevertheless, although Uganda has been applauded for declining HIV prevalence and overshooting her *3 by 5* target of treatment to 60,000 patients by the end of 2005, the socio-economic impact of HIV/AIDS continues to manifest considerably[91]. Figure A.5 shows that estimates of the number of people living with HIV/AIDS have been rising over the years.

[90] UAC &UNAIDS (2000) *The National Strategic Framework for HIV/AIDS Activities in Uganda*: 2000/1-2005/6, UAC, Kampala.
[91] Rudolph, C. & Musau, S. (2005) *Estimating Resources Requirements for Scaling-up Antiretroviral Therapy in Uganda* (Kampala, USAID).

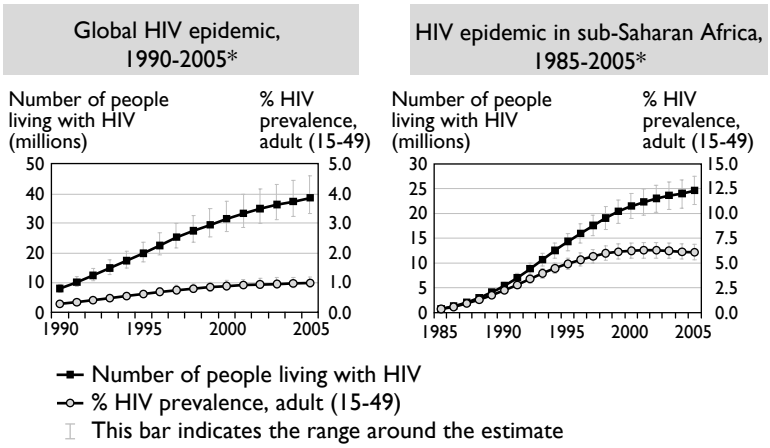

Figure A.5. Estimated number of people living with HIV/AIDS. Even though the HIV prevalence rates have stabilized in sub-Saharan Africa, the actual number of people infected continues to grow because of population growth. Applying the same prevalence rate to a growing population will result in increasing numbers of people living with HIV.

Source: Adopted from the UNAIDS/WHO (2006) Report on Global AIDS epidemic, May 2006 (Available on line at: http://data.unaids.org/pub/GlobalReport/2006/2006GlobalReportSlide003.ppt#256,1,Slide)

Annex VI: Steps taken by Ministry of Education and Sports (MoES) in response to HIV/AIDS[92]

- In 1986, the MoES launched an *AIDS education campaign* conducted at all levels of education. MoES has since then been involved in various activities including conducting of advocacy seminars, counselling in schools and institutions, producing and distribution Information Education and Communication (IEC) materials, and TOT for teachers in AIDS education.
  - In 1991, an AIDS drama entitled RIDDLE was conducted at Zonal, sub-county, county, regional and national levels where 8,500 schools participated.
  - In 1992, an AIDS drama for secondary schools entitled HYDRA was conducted by of the MoES School Health Education Project. The HYDRA was translated into 12 local languages and 6 local drama groups acted it across the country.
  - In 1994, primary schools participated in national AIDS drama competitions.
- *Curriculum review* has been undertaken to include HIV/AIDS in the primary school curriculum as part of Health Education. By 1992, the AIDS unit for primary schools had been distributed to all schools and the curriculum for Primary Teachers' colleges containing AIDS education had been written. HIV/AIDS is also incorporated in the curriculum for non-formal education initiatives. These include: COPE (Complementary Opportunity for primary Education), ABEK (Alternative ASIC Education for Karamoja) and BEUPA (Basic Education for Poor Areas).
- The *National Strategic framework for HIV/AIDS activities* 2001/-2005/6 was developed out of a process of consultation among stakeholders working towards HIV/AIDS prevention and care. The development of the framework was inspired by the understanding that HIV/AIDS is an intersectional problem whose responses should be integrated

[92] Malinga, F. (2000) *Actions taken by Ministry of Education and Sports to cope with the impact of HIV/AIDS* (Paris, IIEP).

into all aspects of developmental work, service provision, and plans of government and civil society organisation. The framework is a national guideline for collaboration and coordination among all stakeholders working towards HIV/AIDS prevention and care. The aims of the framework include:

- Relating the fight against HIV/AIDS to the development goals and action plans particularly the Vision 2025 and Poverty Eradication Action Plan (PEAP).
- Bringing to the fore the active involvement of all stakeholders in the planning, management, implementation, monitoring and evaluation of HIV/AIDS interventions over the 2000/1 -2005/6 period.
- Establishing indicators for measuring the progress and impact of HIV/AIDS interventions in the country with a view to taking appropriate action for the subsequent plans.
- Providing a basis for costing and mobilisation of resources for HIV/AIDS interventions in Uganda.

- The MoES has developed an *HIV/AIDS action plan for the education sector* where 9 broad objectives for combating HIV/AIDS over a five year period have been outlined as:
  - promote development and implementation of HIV/AIDS policies relevant for the sector;
  - intensify advocacy for HIV/AIDS in educational institutions and universities;
  - incorporate HIV/AIDS issues into the curriculum for all education institutions;
  - promote skills-based teacher training in HIV/AIDS education;
  - promote AIDS education, counselling and services in all institutions and levels of education;
  - promote the welfare of AIDS orphans;
  - build partnerships with community and non-governmental organizations, in order to undertake joint activities;
  - promote HIV/AIDS research on various aspects relevant to the education sector; and
  - promote joint planning, coordination, monitoring and evaluation of HIV/AIDS activities in the education sector.
- There is a *workplace policy for the education sector* which is a component of the Education sector and Work Place Policy. It serves to ensure effective prevention of HIV/AIDS amongst MoES

employees, comprehensive management of the consequences of HIV/AIDS. It is based on principles such as non-discrimination, confidentiality. It focuses on health promotion and management of HIV/AIDS risk through AIDS education and awareness programs.

- *Presidential Initiative on AIDS Strategy Communication to the Youth (PIASCY).* PIASCY is an initiative of the President to improve communication on HIV/ADS to young people in schools. The PIASCY teacher orientation was provided by the USAID funded Uganda Program for Human and Holistic Development (UPHOLD) where 45,000 teachers from 15,890 schools nation wide participated. Head teachers and teachers are sensitised on various issues concerning HIV/AIDS. A teachers' guide was developed and provided to all schools. PIASCY materials were developed through a series of stakeholder meetings including public health experts, experienced HIV/AIDS educators and NGOs. The first component of PIASCY requires head teachers to address school assemblies at least every two weeks and teachers have to give a set of 26 messages about puberty, sex, and how to avoid harassment through complementary classroom lessons. Some religious groups have raised concerns about the fact that too much information was given to pupils leading to the revision of PIASCY books for primary level.

Annex VII: Inventory of initiatives to address gender inequalities in primary education in Uganda

Complementary Opportunities for Primary Education (COPE)
This is a program targeting improving the literacy situation in the Country especial among girls and other disadvantaged children aged 6-18. It provides an opportunity for children who either never attended or dropped out of school for various reasons to acquire literacy. The programme facilitates the teaching of normal subjects such as English, Mathematics, Social studies, and Science using a flexible time table determined by the communities. COPE is currently taking place in 8 districts. These are Bushenyi, Kamuli, Masaka, Arua, Kisoro, Nebbi, Mubende, Ssembabule, Kalangala, and Mbarara.

Promotion of Girls Education (PGE) scheme aims at improving girls' retention and performance at school. The scheme grants awards to schools that have demonstrated successful attempts at encouraging girls to remain and perform well in school. MoES collaborates with school communities, districts, and PTCs in executing this scheme.

The Girls' Education Movement in Africa (GEM) was also launched in Uganda in August 2001. The movement aims at promoting gender equality in education through enabling girls to realise and concretise their rights to participate in identifying best practices that enhance their participation in education, and issues that affect their education, and life skills hence forth.

National Strategy for Girls' Education
The Uganda National Strategy for Girls' Education was developed in 1999 and launched in 2000. It aims at addressing the gender inequalities in education. It acts as a master plan for use by all stakeholders in girls' education.

Gender desk at the ministry of Education
Ministry of Gender
The Ministry of Gender Labour and Social development (1997) formulated the National Action Plan on Women (NAPW) and the National Gender Policy (NGP) to help advocate for gender equity at all levels in all aspects of life.

The Equity in the Classroom (EIC) programme aims at facilitating equal participation of girls and boys in the classroom. Teachers have been sensitised to eschew negative attitudes towards girls' education and adopt methods to promote equity in the classroom. The Uganda National Curriculum Development Centre (UNCDC) has been revising the primary education curriculum since 1992 to make it more gender responsive as part of the Primary Education Reform.

The **Classroom Construction Grant** (CCG) programme builds classrooms and pit latrines for schools while specifically separating girls' latrines from those of boys.

Child Friendly School programme aims at promoting girls' education in a friendly school and home environment at the sub-county, district and national levels.

Girls and focussing Resources for Effective School Health (FRESH) focuses on provision of safe water and sanitation to schools, provision of washrooms for girls, urinals for boys. About 642 child (girl) friendly primary schools, including promotion of interactive methodologies have benefited approximately 145,500 girls and 259,000 boys.

Nederlandse samenvatting

Dit boek is het resultaat van een studie die werd uitgevoerd op het platteland van Oeganda. Het doel van de studie was te begrijpen waarom er nog steeds ongelijkheid tussen de seksen bestaat in het basisonderwijs tot 12 jaar (Universal Primary Education, UPE), ondanks gerichte pogingen van de regering om deze ongelijkheid aan te pakken.

Het onderzoek is ontworpen om een afgewogen standpunt in te nemen hoe de complexe interactie tussen structurele processen en schoolprocessen leidt tot ongelijkheid. Daarom heb ik mij in het bijzonder gericht op de vraag hoe de sekseongelijkheid in het onderwijs voorvloeit uit de wegen die individuen volgen als antwoord op de sociaal-economische invloed van hiv/aids op hun bestaansmiddelen. De studie was gebaseerd op de aanname dat verschillende contouren van bredere sociale ongelijkheid en dynamiek – inclusief hiv/aids – de grondslag voor de ongelijkheid in het onderwijs vormen. Bovendien werd verondersteld dat in de context van hiv/aids, structurele patronen bepalen hoe mensen in hun levensonderhoud voorzien. De wijze waarop in levensonderhoud wordt voorzien, moet worden gezien als een proces waarin gaandeweg, stap voor stap, doelen, voorkeuren, bronnen en middelen voortdurend opnieuw worden beoordeeld in het licht van nieuwe (onstabiele) voorwaarden waarmee de besluitnemer wordt geconfronteerd[93]. Een belangrijke aanname was dat hiv/aids een factor is met betrekking tot de aanhoudende sekseongelijkheid in het educatieve systeem.

De kernvraag van deze studie is: tot op welke hoogte is de hardnekkige aanwezigheid van sekseongelijkheid in het UPE te wijten aan het raakvlak tussen hiv/aids en het levensonderhoud op het platteland? Het voornaamste doel van het onderzoek was daarom vast te stellen waarom sekseongelijkheid in het UPE blijft bestaan, ondanks gerichte

[93] De Bruijn, M.E. & van Dijk, H. (2005) Introduction: Climate and Society in Central and South Mali in: M.E. de Bruijn, H. van Dijk, M. Kaag & K. van Til (eds), *Sahelian Pathways, Climate and Society in Central and South Mali* (Leiden, African Studies Centre), pp.7.

pogingen de ongelijkheid op te heffen. De leidraad in de studie waren vier specifieke doelen, namelijk:

1. Vaststellen hoe het effect van hiv/aids op de inkomens van plattelandshuishoudens in conflict komt met een investering in onderwijs voor meisjes.
2. Uitzoeken hoe de reactie van huishoudens op hiv/aids de competentie van de onderwijzers om seksegelijkheid te stimuleren, beïnvloedt.
3. Identificeren van andere, aan school gerelateerde factoren die seksegelijkheid verhinderen in de context van hiv/aids.
4. Een kader voorstellen om de hardnekkigheid van sekseongelijkheid in het UPE te begrijpen.

De studie was etnografisch van opzet, waarbij technieken zoals deelnemerobservatie, levensverhalen, etnografische gesprekken en focusgroepen werden gebruikt. Veldwerk werd uitgevoerd in de regio Luweero in centraal Oeganda (zie bijlage 1) tussen juni 2004 en juni 2005. Drie scholen (twee openbare en een privé-school) en de omliggende dorpen namen deel aan het onderzoek. Het onderzoek strekte zich uit tot onderwijzers, leerlingen, ouders en voortijdige schoolverlaters.

De bevindingen met betrekking tot het eerste onderwerp van de studie, dat in hoofdstuk 2 wordt behandeld, maakten duidelijk dat huishoudens door de aanwezigheid van hiv/aids gebrek hebben aan kapitaal dat nodig is om in het levensonderhoud te voorzien. Hierbij moet zowel aan financieel kapitaal als menselijk kapitaal worden gedacht. Dit is te wijten aan diepgewortelde armoede die is ontstaan door aids en de aanwezigheid van weeskinderen die door aids hun ouders hebben verloren. Het was bekend dat de mensen in de dorpen al arm waren voordat ze te maken kregen met hiv/aids. Uit de levensverhalen en andere door mij verzamelde gegevens kan ik echter opmaken dat door hiv/aids de armoede explosief is gestegen. Deze armoede stopt niet op gezinsniveau, maar werkt door in alle lagen van de maatschappij.

De situatie wordt ook niet verbeterd door de aanhoudende ongelijke machtsverhoudingen. In het huishouden worden werkverdeling, besluitvorming en verdeling van het huishoudgeld gedaan op basis van sekse. Deze diepgewortelde structuur wordt in stand gehouden door maatschappelijke normen en waarden, overtuiging, gebruiken en

patronen en beïnvloedt daarmee geruisloos de wijze waarop individuen de invloed van hiv/aids beantwoorden.

Samenvoeging van gegevens laat zien dat de wegen die mensen kiezen doorgaans niet verenigbaar zijn met gelijkheid en in het bijzonder niet met onderwijs voor meisjes. Gezinnen hebben bijvoorbeeld door ziekte of overlijden arbeidskrachten verloren, met als gevolg lagere opbrengsten van het land en de daarmee gepaard gaande voedsel- en inkomensonzekerheid.

In hoofdstuk 2 van deze thesis wordt uitgelegd hoe de druk, die het gevolg is van aids binnen het huishouden, in deze huishoudens of bij individuen, de strijd voor seksegelijkheid teniet doet.

Een van de dingen die arme mensen doen is kinderen meer laten meewerken op het land en in het huishouden. Het bleek dat in de tijd dat men nog niet te maken had met de door aids veroorzaakte druk, kinderen alleen maar in de weekenden, of soms 's avonds na school, moesten meehelpen op het land. Tegenwoordig moeten veel kinderen dagelijks op het land helpen voordat ze naar school gaan.

Dit probleem wordt verergerd door de ongelijke posities van jongens en meisjes in de maatschappij. Waar jongens gemakkelijk kunnen weigeren om deze activiteiten uit te voeren en daarmee wegkomen, is het voor meisjes, door de wijze waarop ze worden opgevoed, veel moeilijker om te weigeren. Ze worden namelijk veel meer dan jongens opgevoed om dienstbaar en gedisciplineerd te zijn. In gezinnen waar kinderen niet op het land hoeven te werken voordat ze naar school gaan, moeten ze in ieder geval water halen of andere huishoudelijke taken uitvoeren, zoals het huis en erf schoonmaken. In tegenstelling tot de meisjes hebben jongens de vrijheid om na het opstaan meteen naar school te gaan. Meisjes vertelden dat ze het moeilijk vinden om naar school te gaan en hun moeder zonder water of met een vies huis achter te laten. Dit verklaart waarom meisjes later op school komen dan jongens of, omdat ze erg moe zijn, minder deelnemen aan klassikale activiteiten. Het ontbreken van voldoende arbeidskracht in dergelijke gezinnen suggereert dat hiv/aids ertoe leidt dat de tijd ontbreekt om in meisjes te investeren om naar school te gaan. Er is nog een ander probleem, veroorzaakt door aids: de kinderen worden betrokken in het

verdienen van het huishoudelijke inkomen om onderwijs te kunnen betalen. Het werd opgemerkt dat kinderen, vooral jongens, ook voordat de invloed van hiv/aids duidelijk werd, probeerden hun eigen geld te verdienen. Veel kinderen vertelden echter dat, voordat ze hun ouders verloren, dit zelfverdiende geld werd gebruikt om kleding, schoenen en andere persoonlijke benodigdheden aan te schaffen. Ouders betaalden schoolboeken en andere schoolbenodigdheden. Vandaag de dag hebben de huishoudens dringend behoefte aan voedsel en medicijnen. Hierdoor staat lesmateriaal onder aan de prioriteitenlijst, maar kinderen worden gestraft als ze zonder lesmateriaal op school komen. Hoewel jongens de vrijheid hebben om te werken en geld te verdienen, worden meisjes beperkt en moeten huishoudelijke taken en werk op het land verrichten. Dit impliceert dat er niet alleen ongelijke toegang tot de activiteiten is, maar dat er ook ongelijkheid in inkomen is dat noodzakelijk is om schoolspullen te kunnen aanschaffen. Deze verschillen zijn duidelijk zichtbaar in de hogere klassen waar meer materiaal nodig is. Meisjes uit de dorpen die aan het onderzoek meededen, bieden in toenemende mate seks aan in ruil voor kado's of geld om schoolspullen of andere noodzakelijkheden te kunnen aanschaffen. Dit heeft zwangerschappen tot gevolg en daarmee voortijdig schoolverlaten. De door aids veroorzaakte armoede en de aanwezigheid van weeskinderen heeft dus tot gevolg dat huishoudens minder geld kunnen besteden op het gebied van onderwijs. Dat er minder tijd en geld wordt besteed aan onderwijs maakt dat de huishoudens zich weten te redden wat betreft de dagelijkse levensbehoeften, maar het veroorzaakt een vicieuze cirkel van hiv/aids en ongelijke kansen voor de verschillende seksen. Kort samengevat: in de context van hiv/aids houdt de wijze waarop inkomsten binnenkomen en besteed worden in samenhang met de ongelijke relaties de ongelijkheid der seksen in stand.

De bevindingen met betrekking tot het tweede doel, zoals vermeld in hoofdstuk drie, laten zien dat de invloed van HIV/AIDS op inkomens van plattelandshuishoudens inderdaad de mogelijkheden van de onderwijzer in de weg staat om seksegelijkheid te bevorderen. Dit wordt veroorzaakt doordat kinderen in context met hiv/aids kampen met veel inkomensproblemen, inclusief gebrek aan lesmateriaal, middagmaal, kleding, ouders en een prettige schoolomgeving. Sommige kinderen die binnen het gezin te maken hebben met hiv/aids en hierdoor kwetsbaar zijn, moeten vaak school missen, of komen te laat op school. Sommigen

komen zonder schoolspullen, anderen krijgen alleen maar 's avonds te eten, omdat er thuis geen ontbijt is en er op school geen middagmaal wordt gebruikt. Onderwijzers zijn echter niet op de hoogte van de thuissituatie van de kinderen. Ze verwachten van de kinderen dat ze op de juiste plaats, op de juiste tijd het juiste ding doen. Leerlingen van UPE scholen klagen over lichaamsstraffen die door onderwijzers worden gegeven, omdat ze geen schoolspullen hebben of slecht presteren in de klassikale oefeningen. De vraag is of onderwijzers wel de noodzakelijke competentie hebben om seksegelijkheid in het kader van hiv/aids te stimuleren.

Samenvoeging van veldgegevens maakte duidelijk dat er een noodzaak is om kernvaardigheden te ontwikkelen voor basisschoolonderwijzers in het licht van de hiv/aids invloed. Dit wordt uitgebreid besproken in hoofdstuk 3.

Vijf vaardigheden die specifiek in dit onderzoek werden geïdentificeerd zijn: intermenselijke vaardigheid, pedagogische vaardigheid, kennis van de onderwerpen en methodologische vaardigheid, kennis van aids, en seksevaardigheid. Ontwikkeling van deze vaardigheden zou kunnen plaatsvinden door professionele profielen te ontwikkelen voor onderwijzers om ontwikkeling van onderwijzers op één lijn te krijgen en prestatiemaatstaven voor scholen en contextgebonden behoeftes vast te stellen. De lerarenopleiding hervormen en de werkomstandigheden voor onderwijzers in het basisonderwijs verbeteren zou ook de ontwikkeling van de gewenste vaardigheden versterken.

Het derde doel was andere aan schoolgerelateerde factoren te identificeren die seksegelijkheid in de context met hiv/aids belemmeren. Deze werden geïdentificeerd als 'interactie in de klas, rechten van kinderen op onderwijs'. Wat betreft interactie in de klas laat ik in hoofdstuk 4 zien hoe de door sekse bepaalde interactie in de klas en de leervaardigheid van de leerlingen voortvloeien uit de invloed die hiv/aids heeft op het plattelandsinkomen. Deze thesis brengt onder de aandacht in welke mate de verschillen in schoolvaardigheid tussen de seksen worden veroorzaakt door hiv/aids.

De bevindingen uit het onderzoek onthullen twee soorten interactie in de klas. Er is sprake van leraar-leerling interactie en er is leerling-

leerling interactie. Het bleek dat het dagelijkse bestaan van de leerlingen van invloed is op de leraar-leerling interactie. Het feit bijvoorbeeld dat meisjes vaker school missen dan jongens, zorgde ervoor dat ze stiller in de klas waren. Dit zou er aan kunnen bijdragen dat de leraar meer gesprekstijd aan de jongens besteedt, omdat de zichtbaarheid van de meisjes minder is. Daarbij werd ook uit de studie duidelijk dat de sekse van invloed is op reacties tussen leerling-leraar. Bijvoorbeeld, jongens krijgen meer negatief mondeling commentaar, wat zij positief gebruiken om hun cijfers te verbeteren. Meisjes daarentegen zien af van woordenwisselingen in de klas als een strategie om negatieve feedback en straf te vermijden. Wat betreft leerling-leerling interactie waren twee types te onderscheiden: gewone interactie in de hele klas, wat gemakkelijk te herkennen was en – waar nodig- te corrigeren; dit gedrag was meer kenmerkend voor jongens. Daarnaast zijn er kleine groepjes, waarvan het gedrag moeilijker te herkennen is en te corrigeren en dit gedrag is meer kenmerkend voor meisjes. De invloed van hiv/aids op participatie in de klas en de vaardigheden van de leerlingen in het algemeen is negatief. Het is bijvoorbeeld geanalyseerd dat hiv/aids de verschillen tussen de seksen in schooldeelname versterkt, dankzij het feit dat de taken van de meisjes in het huishouden verveelvuldigd worden. Dit beïnvloedt hun mogelijkheden om naar school te gaan en leidt tot negatieve reacties van de leraren. Meisjes reageren hierop door in de klas een plaats in de periferie in te nemen. In deze thesis wordt interactie in de klas daarom geanalyseerd als het resultaat van externe factoren, inclusief de invloed van hiv/aids op het inkomen van het plattelandshuishouden.

Het recht van kinderen op onderwijs wordt behandeld in hoofdstuk 5. In dit hoofdstuk wordt seksegelijkheid opgevat als een gelijkheid in mogelijkheden om gebruik te maken van de rechten op onderwijs, gebruikmakend van de *capabilities approach*[94]. Het hoofdstuk bespreekt hoe sekseongelijkheid van leerlingen om gebruik te maken van hun

[94] Nussbaum, M. (2000) *Women and Human Development: The Capabilities Approach* (Cambridge, Cambridge University Press).
Sen, A. (1980) Equality of What? in: S. McMurrin (Ed). *The Tanner Lecture on Human Values 1* (Cambridge, Cambridge University Press), pp. 195-220.
Sen, A. (1992) *Inequality re-examined* (Oxford, Oxford University Press).
Sen, A. (1999) *Development as Freedom* (Oxford: Oxford University Press).

recht op onderwijs, groter wordt door de invloed van hiv/aids op hun levensonderhoud.

Capaciteiten zijn wat individuen kunnen doen en zijn. Voor kinderen hoort daarbij: naar school kunnen gaan, mee kunnen doen en school af kunnen maken. De invloed van hiv/aids ontneemt leerlingen niet alleen de mogelijkheid om de basisschool te doorlopen en af te maken, maar ontneemt hen ook de toegang tot schoolspullen, zoals boeken, pennen en potloden, kleding en voldoende voedsel. Zoals al is opgemerkt, versterkt hiv/aids de groei van armoede, waardoor leerlingen zich geen schoolspullen meer kunnen veroorloven. De bevindingen laten ook zien dat hiv/aids de aanwezigheid van de leerlingen op school negatief beïnvloedt. Door een toenemende vraag naar arbeidskracht in het huishouden omdat er meer taken gedaan moeten worden, wordt de ongelijkheid in schoolparticipatie negatief beïnvloed.

Het werd ook duidelijk dat de kwaliteit van het onderwijs dringend aandacht nodig heeft. Bij een van de scholen ontbrak het aan water en voldoende toiletfaciliteiten. Over het algemeen was de motivatie van de leraren slecht; er waren geen maaltijden, geen geschikte lesboeken, meubilair of ander noodzakelijk instructiemateriaal. Bovendien kwam uit het onderzoek naar voren dat hiv/aids ertoe bijdraagt dat het recht op acceptabel onderwijs aan kinderen wordt ontnomen. Leerlingen werden bijvoorbeeld onderworpen aan lichamelijke straffen als ze te laat kwamen, of geen lesmateriaal hadden. Vele 'schuldigen' waren leerlingen uit huishoudens die met aids te maken hadden, veelal meisjes. Nog erger was dat bleek dat ongewenste intimiteiten in scholen nog steeds plaatsvinden. Meisjes hebben vaker te lijden onder bovenstaande incidenten dan jongens in UPE scholen, doordat de hele maatschappij van machtsongelijkheid doordrongen is. De bevindingen laten daarom zien dat kinderen nog steeds de mogelijkheid wordt ontnomen om van acceptabel onderwijs gebruik te maken.

Los van het gegeven of scholen acceptabel onderwijs bieden, is het vermogen van scholen om hun procedures aan te passen aan de noden van hun leerlingen onacceptabel. Ondanks wijzigingen in het curriculum van de basisschool, wijzen de bevindingen uit dat de leerlingen nog altijd onvoldoende vaardigheden meekrijgen om deel te nemen aan de maatschappij. Daarbij lijkt er ook nog geen oplossing

te zijn voor vroegtijdig schoolverlaten dat veroorzaakt wordt door zwangerschap. Dit treft uitsluitend meisjes en is ten dele te wijten aan de door aids veroorzaakte armoede. Hierdoor worden meisjes gedwongen seksuele relaties aan te gaan om er financieel en materieel op vooruit te gaan. Uit deze thesis blijkt dat de mogelijkheden voor kinderen om gebruik te maken van hun recht op onderwijs, zoals is bepaald door Katarina Tomasevski[95], nog volledig vervuld moeten worden. De mate waarin hiv/aids bijdraagt aan het verlies hiervan kan niet genoeg worden benadrukt.

Het vierde doel van dit onderzoek was een kader te scheppen om te begrijpen waarom sekseongelijkheid binnen het onderwijssysteem blijft bestaan; de resultaten staan in hoofdstuk 6. Dit hoofdstuk voegt de bevindingen uit de voorgaande hoofdstukken (2, 3, 4 en 5) samen, in een poging een kader te creëren om de ongelijkheid beter te begrijpen. Ik benadruk de noodzaak om onze opvattingen opnieuw te focussen in een poging de strijd voor gelijkheid der seksen te sterken.
We moeten niet zozeer kijken naar seksegelijkheid in aantallen (of, hoeveel kinderen er van ieder geslacht regelmatig school bezoeken), belangrijker is er naar te kijken als een mensenrechtenkwestie, zoals ik in hoofdstuk 4 heb omschreven. Ik beschouw gelijkheid der seksen als de voorwaarde tot gelijke behandeling en kansen in alle aspecten van het leven. Daarom is seksegelijkheid het bereiken van gelijke kansen om naar school te gaan, te leren en het verwerven van educatie[96].

Deze thesis erkent dat menselijke diversiteit en conflicten bijdragen aan het laten voortbestaan van ongelijkheid. Voortbordurend op Crenshaw's concept van intersectionaliteit, spreek ik mij uit voor een conceptuele

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[95] Tomasevski, K. (2001) Human Rights Obligations: Making education available, accessible, acceptable and adaptable. Right to education primers, no. 3. (Gothenburg, Novum Grafiska).
Tomasevski, K. (2003) Education Denied: Costs and remedies (London, Zed Books).
Tomasveski, K. (2006) Human rights obligations in Education: The 4-A Scheme. (Nijmegen, Wolf Legal Publishers).

[96] Aikman, S. & Unterhalter, E. (2005) Introduction in: S. Aikman & E. Unterhalter (eds.). *Beyond access: Transforming Policy and Practice for Gender Equality in Education* (Oxford, OXFAM GB), pp. 1-12.
Colclough, C. (2004) Achieving gender equality in education: How much does it take? *Prospects* 34 (1), 3-10
Subrahmanian, R. (2005) Gender equality in education: Definitions and measurements, *International Journal of Educational Development* 25 (4), 395-407.

ruimte, waarin de specifieke contouren van sekseongelijkheid beter begrepen en geplaatst kunnen worden. Ik licht de verschillende intersecties uit waar ongelijkheid in stand gehouden wordt. Dit zijn de scheidsvlakken tussen discriminerende systemen, zoals het patriarchaat en economische achterstand, of tussen verschillende categorieën, zoals geslacht, klasse, leeftijd en besmetting met aids.

Ik beargumenteer dat de invloed van hiv/aids de effecten van de scheidslijnen zelfs overschrijdt omdat het meer categorieën van gemarginaliseerde groepen creëert. Hiv/aids vergroot de negatieve effecten van intersectionaliteit en is daadwerkelijk discriminerend. Het werd duidelijk dat de uitzonderlijke ervaringen van meisjes die in hun directe omgeving te maken hebben met hiv/aids en daardoor zeer kwetsbaar zijn, meestal ondergebracht worden onder die van meisjes in het algemeen. Dit brengt met zich mee dat hun moeilijke situatie niet wordt erkend. In de context van hiv/aids is dit zeer ongewenst, want het belemmert de strijd voor gelijke behandeling en mogelijkheden.

Conclusie: het antwoord op de vraag of hiv/aids bijdraagt aan ongelijkheid in het UPE onderwijs is bevestigend. Men moet echter opmerken dat hiv/aids bestaande structurele belemmeringen tot ongelijkheid slechts versterkt. Met andere woorden, zelfs als er geen hiv/aids zou zijn, zou ongelijkheid waarschijnlijk blijven bestaan; de omvang zou echter anders zijn. Dit neemt niet weg dat het aandeel van hiv/aids aanzienlijk is en dringende actie verlangt. Er is daarom een sterker mechanisme nodig om de invloed van hiv/aids op het inkomen op het platteland af te zwakken.

Ook zou de toegankelijkheid tot antiretrovirale therapie in plattelandsgebieden kunnen worden opgeschaald, om te bewerkstelligen dat mensen de mogelijkheid terugkrijgen om productief te zijn. Daarnaast zijn er mechanismen nodig die voorzien in de educatieve noden van kinderen die in hun directe omgeving met hiv/aids te maken hebben en daardoor kwetsbaar zijn. Voorts zou er wetgeving moeten komen tegen alle vormen van feitelijke discriminatie. Toekomstig onderzoek zou zich kunnen richten op hoe het beste wetgeving tot stand gebracht kan worden waarmee opgetreden kan worden tegen alle vormen van feitelijke discriminatie die ten grondslag ligt aan sekseongelijkheid in het onderwijs.

Tevens is het van belang dat de lerarenopleiding wordt hervormd en in lijn wordt gebracht met professionele profielen en kwalificatiestructuren. Dit zou betekenen dat Oeganda's minister van Onderwijs en relevante departementen lerarenprofielen voor basisscholen moeten ontwikkelen en steeds herzien om sekseongelijkheid te verminderen. Verdere hervormingen moeten het mogelijk maken dat leraren zich aanpassen, integreren en hun professionele kennis in de context van het leraarschap te plaatsen.

Op lange termijn zou tevens de benadering van het onderwijs stap voor stap gewijzigd kunnen worden van een dienstverlenend instrument naar een instrument met emancipatoire doelen. Zo zouden kinderen niet aangemoedigd moeten worden onderling een competitiestrijd aan te gaan, want dit gaat ten koste van hun vermogen om mee te doen in het creëren en hebben van kennis. Verder zouden leraren op lagere scholen meer gemotiveerd zijn wanneer er verbetering van de werkcondities plaatsvindt en zij de kans krijgen hun vaardigheden in bepaalde vakken te ontwikkelen. Toekomstig onderzoek zou gericht kunnen worden op de ontwikkeling van lerarenprofielen om het proces van verbetering en versterking van hun vaardigheden mogelijk te maken.

Daarbij is het noodzakelijk meer en krachtiger maatregelen te nemen teneinde meisjes meer macht te geven en hun zelfachting te vergroten om zo de negatieve invloeden van hiv/aids op de belangrijke interactie in de klas te bestrijden. De geringe doorstroom naar secundair onderwijs moet ook aangepakt worden. Dit laat concreet zien dat academische vaardigheden niet genoeg zijn. De strijd voor seksegelijkheid moet gecombineerd worden met de mogelijkheid om kinderen vaardigheden te laten opdoen waarmee ze in hun inkomsten kunnen voorzien. Toekomstig onderzoek zou zich daarom kunnen richten op hoe deze combinatie het beste te realiseren is.

Samenvoeging van de studieresultaten laat ook zien dat het noodzakelijk is de maatschappij zodanig te veranderen dat de overmatige afhankelijkheid van meisjes in het huishoudelijke werk verlaagd wordt. Daarmee zou gelijkheid bevorderd worden. Het zou het effect van de op sekse gebaseerde huishoudelijke taakverdeling op onderwijs verminderen en bovendien de mogelijkheden van kinderen om naar

school te gaan en deel te nemen aan schoolactiviteiten aanzienlijk verbeteren. De bevindingen laten zien dat toekomstig onderzoek zich het beste kan richten op hoe sociale veranderingen bereikt kunnen worden, met als doel deelname in het onderwijs te versterken en kinderen te laten genieten van hun recht op onderwijs.

Er zijn verschillende achtergronden van discriminatie, waarop ongelijkheid goed gedijt. Daarom zou de strijd voor seksegelijkheid zich moeten richten op het ontwikkelen en implementeren van maatregelen die gericht zijn op meisjes in het algemeen alsof het een aparte categorie was, inclusief specifieke toevoegingen voor diegenen die op een bepaalde manier achtergesteld zijn.

Dit helpt de uitzonderlijke ervaringen aan de orde te stellen van kinderen die in hun directe omgeving te maken hebben met hiv/aids en hierdoor kwetsbaar zijn; in overeenstemming met de omvang van hun rampspoed. Zulke maatregelen kunnen *counseling* programma's vanuit school omvatten voor kinderen die te maken hebben met hiv/aids; maar ook het verschaffen van middageten en schoolboeken voor alle kinderen die les krijgen via de UPE kunnen helpen de feitelijke discriminatie in de toebedeling van huishoudgelden en -activiteiten tegen te gaan. Huishoudens met een bepaald aantal wezen in zeer arme gemeenschappen zouden ook financiële ondersteuning kunnen krijgen. Zulke maatregelen zouden kunnen voorkomen dat de uitzonderlijke ervaringen van meisjes die in hun directe omgeving te maken hebben met hiv/aids en hierdoor kwetsbaar zijn, onder de ervaringen van meisjes in het algemeen worden geschaard. Toekomstig onderzoek zou zich kunnen richten op hoe het beste zulke maatregelen genomen kunnen worden, zonder verdere discriminatie te veroorzaken bij kinderen.

In deze thesis ben ik slechts in staat geweest het voortduren van sekseongelijkheid te bestuderen door mij te richten op huishoudens die met aids te maken hebben omdat er personen binnen het huishouden zijn besmet, of reeds zijn overleden. Ik geef weer hoe de wijze om in het levensonderhoud te voorzien in conflict komt met de investering van tijd en geld van de huishoudens in de opleiding van meisjes. Ik benadruk hoe inkomensvoorziening onder invloed van aids de vaardigheden van de onderwijzers te niet doen, als ook interactie in

het klaslokaal, en de rechten van kinderen om onderwijs te genieten, waarbij het diepgewortelde fenomeen van sekseongelijkheid voorgezet wordt. Sekseongelijkheid is niet het resultaat van één geïsoleerde factor, maar eerder van de samenhang van verschillende systemen en identiteiten waarbinnen de inkomensvoorzieningen van leerlingen zich ontwikkelen. Als we de aanhoudende sekseongelijkheid in de context van hiv/aids willen begrijpen, is het kernwoord 'kruispuntdenken' ofwel intersectionaliteit. Daarbij stel ik dat als we ons richten op het teniet doen van de negatieve effecten van de wijze waarop inkomens op het platteland tot stand komen, er een goede kans bestaat dat we de *strijd voor seksegelijkheid* winnen.

About the Author

Doris Muhwezi Kakuru was born in Kaina-Kayonza, Ntungamo district in western Uganda. She holds a Bachelor of Social science honours degree from Makerere University (1996) and a Master of Philosophy degree in Social Anthropology from the University of Bergen (2000). Her M.Phil. research focussed on gender and family studies. Specifically, she looked at how gender relations play out in the process of family management. She did her PhD research in Uganda focusing on HIV/AIDS, rural livelihoods and gender equality in primary education. Her PhD was part of the AWLAE (African Women Leaders in Agriculture and the Environment) research program on gender and HIV/AIDS in Africa. The study was funded by the Dutch government in collaboration with Winrock International.

She is a member of the academic staff and affiliated researcher at the Department of Sociology, Makerere University where she teaches sociology of education. Her areas of research interest include issues of gender and education, social justice, family studies, livelihood studies, and competence studies.

Training and supervision plan

Name of course	Department/Institute	Year	ECTS (1ECTS=28 hrs)
Courses			
Mansholt Introduction course	MGS PhD course	2003	1
Development of Development Theory	ISS, The Hague, CERES PhD course	2003	5.6
Field Research Methods	ISS, The Hague CERES PhD course	2003	6
Gender, Food, Agriculture and Development	MGS PhD course	2003	3
Livelihood Analysis and poverty Reduction Strategies	CERES PhD course	2003	2
HIV/AIDS and Rural Livelihoods in Sub-Saharan Africa	MGS PhD course	2003	3
Oral Histories and life stories	Netherlands Research school of Women Studies (NOV) PhD course	2004	4.5
Interpreting Gender and its intersections: Analysing texts in Feminist social research	Netherlands Research school of Women Studies (NOV) PhD course	2004	6
Education in Developing and Changing Societies	Social Sciences (MSC Course)	2006	6
Advanced Gender Research Methodology	Makerere Univ. Dept. of Women & Gender Studies	2005	1.6
Gendered Impacts of HIV/AIDS on food systems and livelihoods in Sub-Saharan Africa	Sociology of Consumers and Households Tutorial	2004	3
Techniques of Writing & Presenting a scientific Paper	Wageningen University Business school	2005	0.8
Project and Time Management	Wageningen Graduate Schools	2005	1.5
Presentations			
Mansholt multidisciplinary seminar	MGS PhD day	2006	1
Department of Sociology Seminar	Makerere University	2005	1
8th UKFIET International Conference on Education and Development	University of Oxford, Oxford, UK	2005	1
Total ECTS (min. 30)			**47**

This book, which was originally written as a dissertation, broadens the approach to gender equality in primary education by exploring the magnitude of complex interactions between schools and rural livelihood household processes in the context of HIV/AIDS. The arguments are based on recent ethnographic research using dimensions of rural pupils', parents', and teachers' responses to the socio-economic impact of HIV/AIDS on their livelihoods. It gives insight into some of the current debates that have been generated in the field of education, HIV/AIDS and rural livelihoods.

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