

See also

**Basic education:
the role of parents
and private sector**

Pages 4-5

**Achieving EFA
through fee-free
education**

Pages 6-7

**The challenges of
fee-free policies**

Page 8

**Paths towards
innovative
financing**

Pages 10-11

**Grasping the
opportunity
of innovative
financing**

Page 12

IIEP Publications

Page 16

The complex equation of education financing



Structural challenges
can be overcome only
in the long term

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What are the best strategies for implementing full basic education? How can provision in secondary and higher education be successfully developed? What can be done to improve the quality of educational services at all levels? These are the challenges governments worldwide have been addressing, with varying degrees of success.

Indeed, ensuring that large numbers of children get high-quality education means

mobilizing extensive human, material and financial resources. With 6-7% of their nationally generated wealth earmarked for education, the OECD developed countries can offer their young people on average between 15 and 18 years of education in good conditions.

The situation is quite different in developing countries, which are still far from capable of offering education over a

comparable period. In these countries, rapid population growth is greatly increasing the needs that have to be met, while the weak tax base limits the scale of public financial resources.

Demographic pressure is fuelling needs

According to United Nations figures (see the table below), sub-Saharan Africa recorded the world's strongest population growth in 2010 at a rate of 2.3% (and future projections show that the trend in this region will not slacken). This is reflected in a very high proportion of young people in the population, 42% of which is aged under 15. In contrast, Europe is the world region with the most sluggish demographic growth and just 15% of young people under 15.

In economic terms, particularly revealing figures are obtained (see table below) by relating the number of children to the number of working adults – regarded as the generators of wealth and financially liable for the welfare of younger people, particularly with respect to their education. The dependency ratios thus highlight how the context and challenges involved differ from one world region to the next. In Europe, 23 young people under 15 are dependent on 100 adults aged between 15 and 64. In sub-Saharan Africa, this ratio peaks at 78! This is more fully indicative of the crucial need to fund the education of young people in the countries concerned and of the economic burden such funding represents for working people.

Education dependent on state income

The ability of states to unlock internal resources for financing collective services – and especially educational services – is also a central issue. Except for countries with valuable natural resources, which are capable of generating public income



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from exploiting them, many states are unable to draw on an adequate tax base. According to the International Monetary Fund, half of sub-Saharan African countries in 2010 generated domestic resources representing between 10% and 20% of GDP. Even if they earmark one-fifth or one-quarter of such resources for education, these countries are limited in their ability to finance the educational needs of their entire population. The inevitable compromises are all too familiar: a limited average number of years of education and rundown conditions of school education and supervision.

Lines of enquiry

Many countries have begun to implement policies for free education to lessen the financial burden on families liable to

contribute up to 30% of educational expenditure. Studies have indeed shown that household contributions to the funding of education tended to prevent the schooling of children from the most deprived families and made it harder to achieve the aims of universal schooling.

Other approaches are also needed to deal with the demographic and financial pressures confronting many countries. Mobilizing the private sector, partnerships and innovative forms of funding are often cited as short- and medium-term alternatives.

Yet in order to finance educational services to a sufficient level, states have to overcome their structural difficulties. This involves inhibiting population growth, sustained economic growth and a broadening of the tax base. But these are aims that can only be achieved in the very long term. ■

The world population in 2010 and dependency ratios

	Population (millions)	Growth rate	% of those under 15	Dependency ratios for every 100 people aged 15 to 64	
				0-14 years	65 years and over
World	6 909	1.1%	26.9%	41	12
Africa	1 033	2.2%	40.3%	71	6
including sub-Saharan Africa	863	2.3%	42.3%	78	6
Latin America and Caribbean		1.0%	27.7%	42	11
North America	352	0.9%	19.8%	30	19
Asia	4 167	1.1%	26.2%	39	10
Europe	733	0.0%	15.4%	23	24

Source: United Nations, Department of Economic and Social Affairs, Population Division, World Population Prospects Database (<http://esa.un.org/unpp/>)

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The complex equation of education financing	1
editorial: The imperative of financing education ... in the light of recent global events	3
Basic education: the role of parents and private sector	4
The essential role of parents	5
Achieving EFA through fee-free education	6
How Lao PDR alleviates costs for the poorest families	7
The challenges of fee-free policies	8
Towards centralization – the Chinese experience	9
Paths towards innovative financing	10
Grasping the opportunity of innovative financing	12
New modalities for development cooperation in the Education sector	13
Webinar 2010: the integration of ICT in education, 1:1 models	13
Building capacities through distance education	14
Upcoming activities	15
SACMEQ and PASEC meeting on quality of Education in Africa	15
IIEP Publications	16

The imperative of financing education ... in the light of recent global events

When the economic crisis began to broaden in 2009, it was feared that international development assistance to education might fall. Now, two years later, some donor countries have indeed been unable to maintain their levels of development aid in general, while others have decided to move away from supporting education internationally. The latter is a cause for real concern. Early on, IIEP pleaded for increased investment in education as crucial to economic recovery measures, and to protect the poor and most vulnerable (see *IIEP Newsletter*, No. 2, May-August 2009: 'Education and Economic Crisis'). Given recent developments in the Arab countries, as well as the conclusions of UNESCO's *EFA Global Monitoring Report 2011* on armed conflict and education (published in March), this plea bears repetition: the international community should now consider the importance of education in mitigating conflict and overcoming fragility.

The current unrest in the Arab countries is a reminder that the 'vacuum of hope' – created by unemployment, poverty, marginalization, exclusion, disregard for human rights, and conflict – must be urgently addressed. Governments cannot go on simply promising their citizens better services and quality of life. They need to make them a reality.

The young people who led the recent protests are demanding more jobs. The World Bank estimates that countries in the Middle East and North Africa (MENA) region need to create some 100 million new jobs by 2020 to overcome unemployment. With today's global knowledge-based economy, it will be hard to create so many without increasing opportunities for quality education for all, as well as job-related training programmes for young people.

The protestors were also demanding more rights and privileges (greater participation and democratization, more efficient and transparent governance, constitutional rule, and social equity). These can be achieved with formal and non-formal education programmes focusing on life skills and the development of responsible citizenship, as well as institutional capacity development programmes to improve management and strengthen governance systems.

If donors relax their commitment to education and to achieving EFA, most developing countries will be unable to meet these immense challenges. And, with hopes once again frustrated, non-violent movements and protests could turn into violence and armed conflict.

IIEP's work on the financing of education and the development of employable skills through secondary and post-secondary education and training, can provide much-needed input for policy dialogue among UNESCO Member States and development partners. We would like to think that it could also be a starting point for a 'virtuous circle' to recover economic and governance stability. In addition, the IIEP approach to sector planning – which focuses on the participation of stakeholders at all levels down to the school and community – will continue to encourage empowerment, democratization, and conflict mitigation. ■



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Basic education: the role of parents and private sector

The state must remain the prime mover in achieving quality public education for all

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Partnerships and ‘innovative financing’ are a strategic counterpart to policies for free education. What are the specific issues and challenges faced by policy-makers regarding these approaches? What are their impacts on the governance of education? What actors should be involved and what should their roles be? The 2010 IIEP Policy Forum¹ focused on current trends and generated proposals that should be considered before elaborating partnerships to finance education.

The crucial role of families

There are few statistics on the educational expenditure of households, but the studies available show clearly that families are the main partner of states in financing education in developing countries. They sometimes account for around 30% of total expenditure,

by paying tuition fees and meeting other costs related to schooling. It has also been demonstrated that families are quick to react to changes in the cost of education, even in primary education. The introduction of school fees is often reflected in a falling off in school attendance rates, whereas measures to abolish fees soon lead to soaring enrolments.

Alleviating expenditure borne by families is thus an apparently effective action mechanism for policies to boost school attendance. Several approaches have already demonstrated their utility: the abolition of charges for all pupils (schools, parent associations, school books), or measures targeting the poorest families and disadvantaged areas (grants, school meals, transport, supplies, benefits to offset the opportunity costs of children’s work).

Yet financial compensation mechanisms are necessary. If parent associations discontinue their funding and school subsidies are not paid on time, families will once again be required to contribute.

Private education – the risk of two-track provision

Private education assumes many different forms which sometimes coexist, depending on the historical and socio-economic circumstances of countries: it may or may not be non-profit-making, with or without a religious dimension, dependent on individual, joint or even community initiative, well-endowed or reliant on insecure means, and serving geographically, socially or economically segmented forms of clientele. Yet private education seems to develop most strongly above all in its most business-oriented form, targeting the urban middle classes.

Each context raises its own questions of quality assurance and comparison between public-sector and private schools. But education policies as a whole have to take account of the private sector and its contribution to the education of young people. For example, many have identified pre-school education as a level at which the private sector might be encouraged.

¹ See *IIEP Newsletter* No. 3 – September-December 2010

Sometimes, private schools develop where the quality and image of public-sector schools have deteriorated, with overcrowded classes, and problems of discipline or teacher absenteeism. In seeking quality education for their children, the middle classes abandon public provision, with the result that two-track education emerges: on the one hand, a poor-quality public system for the poor and on the other a private system for the richest. Upgrading the quality of public-sector schools has to be a priority for policy-makers.

Partnerships or privatization?

Many organizations are taking an interest in public-private partnerships.

Mobilizing a wholesale effort by society doubtless benefits the quantitative and qualitative development of education systems. Thus alongside traditional partnerships with parents or private schools, other kinds of partnership are being formed with communities, NGOs or businesses at local, national or international levels.

Some partnerships are seeking to engage private operators to run all or some services providing education or support for education, and to introduce market mechanisms into the historically state-dominated education sector. By blurring the customary distinctions between the public and private sectors, they may sometimes be equated with a form of privatization.

Yet whatever motivates private partners – whether philanthropy, social responsibility or business interest – states have to define the framework within which these partners operate and set clear rules for the sharing of responsibility. ■

The essential role of parents

Three questions for Martin Itoua, current Chairman of the African Federation of the Associations of Pupils' and Students' Parents (FAPE)

How far are parents involved in funding schools in Africa?

Martin Itoua: In virtually all African countries, parents build and fit out classrooms. They fund the activity and upkeep of schools, sometimes covering all school expenditure (on supplies, textbooks, and sanitary facilities, etc.). In some countries they even fund teachers' pay and, in countries recovering from conflict, such as Chad, they account for the majority of teachers! Associations of pupils' parents are thus inseparable from African school life. Achieving EFA in Africa seems unthinkable without the parental contribution.

Do you think that the deadline of 2015 for achieving EFA can still be met?

M. I.: Countries have made considerable progress since the Dakar Forum, but much further effort is still required. Indeed, only 60% of children complete their primary education and, of them, just 50% have a good grasp of the basic knowledge involved. The resources invested in universal primary education are likely to be a huge waste if most children leave school without having done what they were there to do, namely learn. Faced with such prospects, EFA in 2015 is an unrealistic aim. While broadening access is clearly necessary to include those who have been shut out and ensure fairness, there is also a need to concentrate on the quality of education.

What is the role of parents in the challenges underlying EFA in Africa?

M. I.: In Africa, in contrast to the developed countries, educational factors as such have a greater bearing on children's attainment than factors related to the family environment. This explains why it is so important for parents to be involved in what goes on in schools and classrooms. Joint action by them in areas of decisive importance such as their contribution to funding, the development of educational strategy, the teaching process and school management remains and will continue to remain vital in Africa. Depending on circumstances, these varied forms of participation mean that schools can be 'appropriated' by their surrounding communities so that they are no longer solely under government control. Parental involvement thus leads to more relevant and effective learning at school and better quality education in achieving EFA.



Achieving EFA through fee-free education

Renewed efforts are needed to maintain progress in improving quality of education in West and Central Africa

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On the initiative of IIEP, more than 60 participants (education specialists from 13 countries in West and Central Africa and development agencies) met in Ouagadougou in October 2010 to discuss matters concerning household expenditure on education and policies for free school education in the sub-region. Here are some of the findings.

Financial burden of parents lowers school attendance levels

All countries represented have at one time or another appealed to households for funding to boost enrolment in primary education: this has meant tuition fees or contributions to parent associations, meeting the costs of classroom building or facilities, or of providing

latrines or water supply points, support to pay for inspections, or for the remuneration of contract, community or voluntary teachers. Over and above these direct contributions comes expenditure incurred outside school premises on children's transport, and the purchase of school clothes or supplies, etc.

Yet these countries are becoming increasingly aware that the burden of educational expenditure borne by parents has an adverse effect on school attendance. For children from the poorest families and especially those with many children, money paid to schools or associations of pupils' parents and expenditure on school supplies have a truly inhibiting impact on school enrolments.

Scrapping enrolment fees and supplying textbooks free of charge

States are attempting to lessen this financial burden by introducing several types of policy. While policies vary depending on the country concerned, they all include measures to abolish school enrolment fees in public education and to distribute school textbooks free of charge. This has been the case for several years in Benin, Burkina Faso, Cape Verde Islands, Cameroon, Côte d'Ivoire, Ghana, the Republic of Congo and Sierra Leone. In most of these countries, enrolment fees have been replaced by a state contribution to the funding of school activity. These contributions are paid either to the communes that run the schools (as in Burkina Faso) or directly to the schools themselves (Benin, Ghana, Côte d'Ivoire, Republic of Congo).

However, this state funding is often inadequate and reaches schools too late. As regards textbooks, supplies and teaching handbooks, in many countries there are not enough of them. Such deficiencies create many difficulties for school heads, especially at the start of the school year.

Other measures indirectly lower costs

Countries in the sub-region also adopt other measures aimed at lowering costs for parents and increasing school attendance: they include intensified building activity and the overhaul of school infrastructure, freer school dress codes, cheaper pupil transport fares, and state liability for expenditure on voluntary teachers working in schools.

So that children attend school regularly, some countries including

Côte d'Ivoire have adopted a special measure aimed at establishing canteens in schools, initially with the support of pupils' parents, who after two or three years fully meet the costs involved in running the canteens.

However, while policies for free school education underlie the improved school enrolment levels noted in several countries, they also account for overcrowded classes and the deterioration in the quality of education, often because such policies are inadequately planned and funded. ■

How Lao PDR alleviates costs for the poorest families

Interview with Mr Lytou Bouapao, Vice-Minister of Education in Lao PDR



Like many countries today, Laos wishes to implement school fee abolition in public primary education. What do you expect as a result of doing so?

Lytou Bouapao: The abolition of tuition fees is one of the flagship measures aimed at improving school enrolment rates with a view to achieving the MDGs and EFA. Tuition fees and other attendant costs definitely prevent many children from accessing or completing primary education. These costs represent an acute burden for the poorest families who have to decide how many of their children to send to school, which ones and for how long.

How has the Government acted?

L. B.: The law on education, revised in 2007, entitled the country's provinces to set fees related to education. But in 2008, the Minister of Finance published directives on the implementation of a presidential decree abolishing all categories of fees in primary education and specifying the precise sums that could be raised through other taxes. From 2011/12, development subsidies will be earmarked for the most disadvantaged districts to support school meals programmes, grants for the poor (to offset the opportunity cost of children's work) and other activities to curb poverty. Block grants will also be used to replace dwindling resources. Furthermore, village committees for the development of education will be involved in a plan to improve the use of these grants by schools.

Are the development partners supporting you?

L. B.: Yes, since 2000, funding agencies in Laos have offered subsidies targeting the very poorest people, which provide for the purchase of school uniforms, pens and pencils, and exercise books, etc. While this policy has proved effective in the districts targeted, it has not been enough to remove the costs barrier for all children. In addition, the Ministry of Education working with the agencies has prepared its Education Sector Development Framework (ESDF) for the period from 2010 to 2015. This framework has been approved by the Government and accepted by the Education for All Fast Track Initiative.



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The challenges of fee-free policies

A move from general measures to more targeted policies – examples from English-speaking countries in eastern and southern Africa

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School fees are seen as a major obstacle to achieving the EFA goals, and many developing countries have begun to pursue fee-free education policies. IIEP has conducted studies in Ethiopia, Lesotho and Tanzania, in which governments have preferred a phased gradual approach to abolishing fees, as opposed to a ‘big bang’ approach. The latter has been widely criticized for its many negative side effects, such as overcrowding, lack of teachers – and teaching space – and parental disappointment.

In Ethiopia the abolition of school fees has been quite smooth. In primary school, it has been viewed as positive. It has enhanced community participation and a sense of responsibility and ownership, while enrolment rates have soared. The government has increased its expenditure to compensate for the loss of income, and communities have contributed on a voluntary basis. However the total budget for primary education is still considered inadequate. Disbursements may be late and unpredictable.

In Lesotho, most primary schools are government-supported church schools. Fees for renting books and the teaching manual, as well as for classroom stationery, school meals, and classroom maintenance, have been scrapped. ‘Hidden’ fees still exist for uniforms, privately employed teachers and ‘volunteer teachers’ awaiting firmer teaching opportunities. Some schools levy charges for building and repairs. Efforts have been made to end persistent child labour and ensure that universal schooling is upheld in law. Some schools still wishing to charge high fees have opted out of the fee-free policy.

In Tanzania, government support to education was formerly strong. However, household educational expenditure shot up with the market reforms of the 1990s. In mainland Tanzania, the government is providing for seven years of compulsory primary education through support to infrastructure and facilities, while offsetting household costs via capitation grants. Meant to cover school repairs, textbooks and supplies, these grants have not been tied to inflation since 2002. Not only are grant amounts too small but their transfer is cumbersome and causes delay. Parents still have to contribute in cash and in kind to the ‘kit’ consisting of a bag, notebooks, pens, uniform and even shoes.

In Zanzibar, the policy is to achieve 10 years of compulsory basic education by abolishing direct tuition fees, though with possible contributions to school building and development. Yet 17 % of school-age children currently fail to attend school. Other major problems are a lack of regular transport or of access to safe water, school meals or uniforms and textbooks. Neither does the government provide capitation grants to schools as it does on the mainland.

There is no means test for these policies, which apply across the board to all pupils. Rarely have special measures been envisaged for poor children, or those from ethnic minorities or rural areas. High opportunity costs in these areas mean that the abolition of fees may not be strong enough an incentive to boost school attendance among poor segments of the population. Ready access to uniforms and textbooks also requires more targeted support for poor families. ■

Towards centralization – the Chinese experience

Lessons learned from both ends of the spectrum

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China appears to have the largest education system in the world, with 162.85 million students enrolled in regular, nine-year compulsory schools in 2007. In the past, this meant the country had no choice but to decentralize the financing and provision of basic education. However, in recent years it has decided to implement reform towards greater centralization.

Under its policy for decentralization of education begun in the 1980s, the government stressed the need to raise funds for public schools from several sources. While it was the major funding agency for compulsory education, extra money was commonly raised through surcharges, revenues from school-run enterprises, donations, gifts, ‘non-tuition’ fees and other sources. In 2000 as a result, China attained its two ambitious goals of providing universal nine-year compulsory education (rural areas included) and eradicating illiteracy among the young and the middle-aged.

However, shortfalls developed. There was pressure on local governments to generate revenue, with uncertainty over how the responsibility should be shared between county and town authorities. Inadequate school funding placed a heavy financial burden on families and local communities. Most alarming were increasing regional disparities, with recurrent educational expenditure per

student 80% higher in towns and cities than in rural areas.

Rethinking the decentralization of education

To tackle these problems, the government began a reform towards centralization in 2002. Central and provincial governments became responsible for funding compulsory education, while county authorities were mainly in charge of the local education sector. In overhauling education finance and administration at local level, the reform has largely contributed to the adequate financing of compulsory education. However, it has not stemmed the increasing financial disparity across regions. Local governments have been left unable to raise the funds required, so that families still bear a significant financial burden.

Yet decentralization as a means of achieving educational goals has not been as effective as expected. This is largely because of the process and its practical implications for how education is funded and provided. The Chinese experience offers a crucial illustration of the need for a robust policy with balanced concern for the various issues at stake. For example, besides funding the education system appropriately, reforms should mobilize the extensive involvement and commitment of local authorities. This is a vital lesson for China but also for other countries deciding how to approach decentralization. ■



Paths towards innovative financing

Debt swaps for education and public-private partnerships

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If current trends persist, the world is likely to miss the Education for All (EFA) goals in 2015, including the universal primary education Millennium Development Goal (MDG2). The 2010 UNESCO's *EFA Global Monitoring Report* (GMR), argues that the financial crisis could create a lost generation of children whose life chances will have been irreparably damaged by failure to protect their rights to education. The GMR estimates that donors will have to bridge a financing gap of \$16 billion a year to meet the goal of universal primary education by 2015.

As the international community is considering an increase in educational expenditure, innovative sources of financing represent a novel approach that could help close the funding gap in education. Aid

agencies and campaigners, however, are still thinking about how to respond to innovative financing models.

The year 2010 broke new ground in taking forward the agenda on innovative financing for education. The Leading Group on Innovative Financing for Development established the Task Force on Innovative Financing for Education. The Task Force aims to explore original financing schemes specifically for the education sector and to outline key mechanisms to generate massive aid flows. Debt swaps and public-private partnerships (PPPs) for education are among the mechanisms contemplated.

Debt swaps for education

Debt swaps for education can be defined as the cancellation of external debt in exchange for the debtor government's commitment to mobilize domestic resources for education spending. Since 1998, 18 debt swaps for education schemes have been initiated in 14 different countries, mostly in the Latin American and Caribbean region.

The effectiveness and efficiency of these debt swaps is conditional on a number of design issues: discount rates, timing of payments, type of debt, 'additionality' and harmonization with other support for education, as well as alignment with national education sector plans, systems and procedures. Modelling a multi-creditor fund for education would mean analysing the experience of health and environmental sectors, avoiding the pitfalls of the EcoFund and the Debt2Health initiative of the Global Fund to Fight AIDS, Tuberculosis and Malaria (GFATM). In order for debt swaps to make an impact in education, both creditors and debtors must fully agree on earmarking substantial resources generated through such swaps to the education sector. While middle-income countries with the debt swap experience may no longer qualify for debt conversions, they could become creditors to low-income countries.

UNESCO initiatives on debt swaps for education

Mandated by the 33rd UNESCO General Conference, the Working Group on Debt Swaps for Education convened in 2006 and 2007 to discuss key concepts and models, lessons learned from various experiences and guidelines on best practices. The 35th General Conference of UNESCO asked the Director-General to establish the Advisory Panel of Experts on Debt Swaps and Innovative Approaches to Education Financing to explore new financing models for education and to strengthen technical knowledge in this area.

Studies are being conducted on mapping current creditor and debtor country policies and debt situation worldwide, creating synergies between debt swaps and other financial instruments and focusing on innovation in the sector.

Given UNESCO's advocacy for debt swaps for education in the Leading Group on Innovative Financing for Development and other fora, innovative debt swaps for education could potentially generate additional financing for EFA.

be created for the education sector, appealing to large firms that do business with education. Potential candidates include companies making pens, notebooks, books... and other products aimed at children (clothes, toys and films). ■

Public-private partnerships for education

In developing countries, public funding is usually insufficient to respond to the increasing demand for educational development, which requires financial provision, pedagogical and human resources development, service delivery, infrastructure, and facilities management, etc.

As the private sector is becoming an essential partner in promoting education, PPPs can complement and enhance the role of government in providing education. Various PPP initiatives are being carried out worldwide. Over the past few years, the number of UNESCO's private-sector partners has risen to several hundred, ranging from multinational companies to small and medium-sized enterprises, philanthropic trusts and foundations, and economic and business associations as well as individuals.

It is now critical to investigate the appropriate roles of each stakeholder in the provision of education, with due regard for the context. However, the private-sector contribution will be socially efficient only if the state fulfils all its responsibilities, especially

in developing standards, curricula and certification.

Looking to other sectors

The health sector could be an inspiration. Launched in 2006, the RED Initiative is an innovative approach bringing together many companies determined to improve the lives of people affected by HIV & AIDS in Africa. The companies involved agree to co-brand some of their products as 'RED' and commit themselves to donating a portion of the profits from sales to HIV & AIDS programmes in Africa, channelled through the GFATM. A similar mechanism could

Public-private partnerships: Who? Why? How?

IIEP research conducted in 2009 in cooperation with the Global Public Policy Institute (GPPi) generated an overview of the existing partnership activities in the area of education. It identified what kinds of partners are involved in PPPs, the level of schooling they target, the kind of support they provide and the specific issues they focus on.

The key partners involved on the public side were mainly governments (76% involvement) and multilateral organizations (61% involvement). On the private side, partners in the non-profit sector and businesses were most prevalent with 60% and 47% involvement respectively. Foundations, faith-based organizations and bilateral organizations seem less present in PPPs in education.

The motivation of the private sector to engage in such PPPs is mainly to build local capacity and job-relevant competence, as well as to enhance its reputation through association with a good cause and promoting the interests of the company.



Grasping the opportunity of innovative financing

Creating a virtuous circle of change in the education sector

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Innovative financing for development is among the priorities of the French presidency of the G20 in 2011. Under the authority of the Malian presidency of the Leading Group on Innovative Financing for Development and as secretary of the international Taskforce on Education, France already plays a key role in considering new models for financing the education sector. At the end of 2010, the Taskforce published a report entitled *2+3=8: Innovating in Financing Education*¹ which proposes new mechanisms intended to offset the investment deficit in education and sustain funding over the long term.

Generating resources and raising awareness

The variety of methods proposed may comprise initiatives that are global no less than regional, bilateral or national. Such innovative financing, more sustainable and more predictable, provides additional

resources for traditional aid and can be implemented through various mechanisms: tax on international financial transactions, local currency education bonds, sports levy, public–private partnerships, micro-donations from individual bank transactions, education venture fund, ‘diaspora’ bonds and voluntary contributions from migrants, as well as ‘debt swap for education’. The role of the Taskforce is also to ensure greater visibility and increased mobilization on Education for All goals with all our partners.

‘Converting the try’

These strategies should henceforth give rise to feasibility studies so that they can subsequently be put into practice in the field. Several of the partners with whom we have worked have already appropriated the foregoing proposals and are now expanding them: UNESCO is supervising a working group on sectoral debt cancellation; as regards public–private partnerships, the European Commission is paying for consultants to draft a report on a RED-type fund² for education; while IIEP is working to identify and develop innovative experiments including large firms; and, the American think tank ‘Results for Development’ together with several banking institutions is actively considering the development of local currency education bonds. France is also supporting a technical study on micro-contributions for development.

Broadening the field of debate

The international Taskforce on Education met in Paris on 4 February 2011 with international organizations and countries the most engaged on these issues. Soon, new countries and organizations will be able to join the Taskforce and make their own contributions to innovative financing for education through further work on approaches already identified and efforts to develop fresh ones. Innovation for Development is an opportunity enhanced by current international issues and by the urgency to achieve the MDGs. ■

¹ Messrs Nicholas Burnett, former Assistant Director-General for Education at UNESCO, and Desmond Bermingham, former Head of the Education for All – Fast Track Initiative Secretariat, were involved in drafting the report which can be downloaded at: www.leadinggroup.org

² RED: www.redinitiatives.org

New modalities for development cooperation in the education sector

An IIEP strategic debate was organized on 15 December 2010

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New aid procedures have emerged since the turn of the millennium. But what is their real impact on the education sector today in developing countries? Have they really promoted country ownership? To what extent have development partners moved towards budget support? What methods have been adopted to monitor and evaluate the results of development? How useful are they in supporting decision-making at country-level? Eckhard Deutscher

(former Chairman of the Development Assistance Committee, OECD), Alain Dhersigny (French Agency for Cooperation), and Agnes Arach (Uganda Ministry of Education and Sports) were invited to IIEP to debate these questions.

‘Aid is only one part of development’ was the first conclusion of the meeting. Speakers emphasized that other political sectors influence development, such as trade and financial and environmental

policies. Speakers also drew attention to dangers inherent in the new procedures, such as an increasing “technocratization”, or the abusive reference to “short-term results”. They called for consideration of innovative approaches to education, in particular through greater importance attached to non-governmental actors in the design and implementation of education policies. Finally, the presentations showed how new procedures could positively change structures and procedures in education ministries, despite generating excessive reliance on financial monitoring. Speakers concluded that greater effort should be invested in processes and evaluation, as well as in capacity development for monitoring and evaluation at decentralized levels. ■

Read more about this strategic debate and download the presentations at: www.iiep.unesco.org

Webinar 2010: the integration of ICT in education, 1:1 models

María Teresa Lugo
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‘Webinar 2010’ was an online forum held from 28 October to 5 November 2010, to discuss policies for ICT integration in the education systems of Latin America, and in particular the 1:1 model (one laptop per child) policy. Jointly organized by IIEP-Buenos Aires and FLACSO Argentina, the forum displayed 30 online lectures from key specialists in the area and 25 virtual stands devoted to the main national, regional and local 1:1 projects currently developed in the region.

Project stands and online lectures were also nodal points for interaction. Both types of component hosted videos, audios, presentations and/or written papers, and discussion forums were made available for participants.

In addition, discussions relied in part on an innovative approach in which participants were asked to choose and join different ‘affinity groups’. A variety of tools further served to stimulate active participation.

Affinity groups related to the various topics of interest to participants concerning the 1:1 model, such as its implications for teaching and learning at different levels, the policies required for its viability, its implications for educational management, and the model as an object of study.

No less than 6,276 users registered during the entire Webinar and over 8,500 visitors accessed the site.

A report on the event will be made available in April 2011. ■

Other publications from IIEP-BA ICT & Education Projects may be found at: www.iipe-buenosaires.org.ar

Building capacities through distance education



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News of former IIEP trainees

Career changes

Ms Khady NDIAYE, Senegal (2009/10), has been appointed Secretary-General of the Planning and Education reform Directorate.

Mr Ashrafun Nessa, Bangladesh (2006/07), has been appointed Assistant Secretary-General at the Ministry of Establishment.

Mr Francis Biney, Côte d'Ivoire (2006/07), has been appointed coordinator of the Committee for Monitoring the Implementation of the Education-Training Sector Plan.

Mr Diabouga Yombo Paul, Burkina Faso (2003/04), has been appointed Director of Studies and Planning at the Ministry of Basic Education and Literacy.

Mr Jacques KI, Burkina Faso (2000/01), has been appointed Secretary-General of the CONFEMEN.

Mr Shinichi Ishihara, Japan (2000/01), has been appointed Visiting Professor at the Graduate School for International Development and Cooperation (IDEC), Hiroshima University.

Mr Roberto Páramo Sandino, Nicaragua (IIEP-BA), has been appointed Education Officer at UNICEF Nicaragua.

For further information

on former IIEP trainees, subscribe to the IIEP Alumni Network by writing to:
alumni-anciens@iiep.unesco.org

IIEP uses the potential of distance education to provide comprehensive training in educational policy, planning and monitoring to developing countries in Africa. The Education Sector Planning (ESP) distance programme developed by IIEP in 2008 with funding from the Fast Track Initiative (FTI/EPDF) has proved to be a successful model for institutional capacity development. The programme was delivered in 2008/09 and 2010/11 in six English-speaking African countries. Ethiopia, Ghana, Kenya, Malawi, Uganda and Tanzania (including Zanzibar) trained over 140 middle-management and senior-management education officials and professionals from local research and training institutions involved in education planning, statistics and financing. The 11-month programme offers practice-oriented training in cooperation with national partner institutions in the beneficiary countries. Its blended instructional design combines individual distance learning (IIEP support through a virtual platform) with face-to-face group meetings organized by the national partner institutions. A regional workshop provides an opportunity for the country teams to reinforce the learning, exchange professional experience and strengthen comparative perspectives.

Participants who successfully complete the ESP programme obtain the Certificate

of Advanced Studies in Education Sector Planning. The Certificate is recognized for further studies leading to the IIEP Diploma or IIEP Master's Degree in Educational Planning and Management.

Preliminary results from an IIEP tracer study confirm the great success of this programme. Most participants from ESP sessions in 2008/09 and 2010 effectively apply knowledge and skills gained from the programme in their work. Local partner institutions benefited from the cooperation, strengthening their own institutional capacity for training delivery. As a result, they enhanced their own training programmes and materials in educational planning.

From 2011 onwards, IIEP is aiming to offer the ESP programme on a regular basis in partnership with a donor agency. ■

The Japanese Government makes available an IIEP fellowship at IIEP in Paris for high-scoring participants in the ESP programme to complete the Master's Degree in Educational Planning and Management. The Government of Japan is also sponsoring three ATP participants in 2010/11 from Uganda, Zimbabwe and Mongolia.

Upcoming activities

March

7-11 March

Workshop on the 'Use and Usefulness of School Grants' organized with the collaboration of UNICEF.

Entebbe (Uganda)

Contact: c.lugaz@iiep.unesco.org

14 March – 10 June 2010

Distance course on 'External Quality Assurance in Higher Education in the Maghreb region and Lebanon'

In joint collaboration with the Arab Network for Quality Assurance in Higher Education (ANQAHE)

Language: French

Contact: m.martin@iiep.unesco.org

16 March

Conference on 'Inclusive Education and Quality', organized with the Directorate General of Culture and Education of the

Province of Buenos Aires and Termium-Siderar
Buenos-Aires, Argentina

Contact: p.scaliter@iiep-buenosaires.org.ar

April

27-29 April

Meeting of UNESCO HIV and AIDS Education Clearinghouse representatives

IIEP, Paris, France

Contact: l.sergeant@iiep.unesco.org

May

3-5 May

Seminar on 'Education and Human Development: Perspectives and vision' organized by UNESCO Brasilia Brasilia, Brazil.

Contact: mpoggi@iiep-buenosaires.org.ar

IIEP will hold the 3-4 October 2011 a Policy Forum on Gender Equality in Education. More to come on this event in the next issue of the Newsletter and on the IIEP website. Contact: policyforum2011@iiep.unesco.org.

SACMEQ and PASEC meeting on quality of education in Africa

24-25 January 2011 – Paris, France

Stéphanie Dolata ▲ IIEP

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The CONFEMEN Programme on the Analysis of Education Systems (PASEC) and the Southern and Eastern Africa Consortium for Monitoring Educational Quality (SACMEQ) – representing the two most important large-scale African initiatives in monitoring and evaluating the quality of basic education – are both recognized internationally for their key roles in strengthening the capacity of national research teams in Africa in the monitoring and evaluation of school systems, and in providing evidence-based information for policy-makers to plan and improve the quality of basic education. In recent months and with the support of IIEP, these two organizations have begun an information-sharing programme associated with research methodology, which has resulted in the insertion of common test items in SACMEQ and PASEC data collection instruments.

Are pupils learning what they are supposed to learn in primary schools in Africa? How equitable are pupil performances by gender and socio-economic background? And how effective are HIV-AIDS prevention education programmes in sub-Saharan Africa? These important questions were addressed during a two-day exchange meeting in late January in Paris, through the presentations and discussions of SACMEQ and PASEC research results.

Every effort was made to employ evidence-based research findings that focused on policy implications for education systems.

Several sessions of the meeting were devoted to sharing experiences concerning the use of advanced research methodologies required for conducting such large-scale international assessments – especially logistics and field administration – and also the specialized software developed by SACMEQ and IIEP for improving data quality and data analysis.

IIEP staff made a special presentation on their research programme on monitoring the HIV & AIDS knowledge of pupils in Africa (co-funded by the 2010–11 UNAIDS Unified Budget and Workplan). The research results showed that there were some major problems with the effectiveness of many HIV-AIDS prevention education programmes.

The meeting was attended by 20 participants including representatives from the Agence Française de Développement, the CONFEMEN Secretariat and IIEP. Participants agreed to organize a third exchange meeting next year in Africa. ■

Further information on this event is available at www.iiep.unesco.org, including interviews with Jacques Boureima Ki, Secretary General of the Confemen, and Demus Makuwa, acting director of the SACMEQ coordination centre.

IIEP Publications

All IIEP publications can be downloaded free of charge at:
www.iiep.unesco.org/information-services/publications

IIEP Research Papers

Understanding Education's Role in Fragility – Synthesis of four situational analyses of education and fragility: Afghanistan, Bosnia-Herzegovina, Cambodia, Liberia

IIEP series: Education in Emergencies and Reconstruction
2011, 65 pp. e-publication



This report was commissioned by the INEE Working Group on Education and Fragility. It provides key data and sheds light on the relationship between education and fragility in a variety of contexts. It aims to bring together the findings of the case studies and, through comparisons guided by various analytic frameworks, generate insights and recommendations for policy and programmes, as well as identify possible areas for further research.

Running to Stand Still: Higher education in a period of global economic crisis

by N.V. Varghese, 2010, 25 pp. e-publication



This paper analyses the impact of the 2008 global economic crisis on higher education. Public policy responses varied among countries – some governments cut budgets, others increased them or maintained allocations at the same level. Most institutions of higher education were restructured yet, despite difficulties encountered, enrolments expanded and cross-border student mobility increased, indicating that higher education was relatively better protected during the current crisis than in previous ones.

IIEP Education Policy Series

Corruption and Education

by Muriel Poisson, Education Policy Series No. 11, 2010, 30 pp.



This booklet identifies the factors that have placed corruption in the education sector higher on the agenda during the last decade. It reviews tools to assess corrupt practices and criteria for their success. It demonstrates that concerted action is required on three main fronts: developing transparent regulation systems and standards; building management capacity; and promoting greater ownership of administrative and financial processes – illustrated by practical cases from international experience.

Fundamentals of Educational Planning

Planning for Technical and Vocational Skills Development

by Kenneth King and Robert Palmer,
Fundamentals of Educational Planning No. 94
IIEP/UNESCO Publishing, 2010, 138 pp.



This book tracks the ways skills have gained importance worldwide. It analyses critically their multiple 'drivers' and linkages to the knowledge economy, growth, and employment. It also acknowledges their many modalities and delivery systems, arguing that this institutional diversity, often spread across several ministries and training authorities, has made it more difficult to give a national account of the skills development sector. Price: €15

International Cooperation for Education

Financing Education: Redesigning National Strategies and the Global Aid Architecture

IWGE Meeting 2010: A Summary of Discussions and Recommendations
2010, 28 pp.



The 2010 International Working Group on Education (IWGE) was held in Stockholm, Sweden on 7-9 June 2010. This booklet provides a summary of the presentations and discussions as well as the recommendations that emerged from them. A full report is forthcoming.

See the IIEP website for further information and to download the summary: www.iiep.unesco.org

IIEP Buenos Aires www.iipe-buenosaires.org.ar

Metas Educativas 2021: Desafíos y Oportunidades

2010 Report on Social and Educational Trends in Latin America
SITEAL/OEI/IIEP Buenos Aires, 2010, 169 pp.



The fifth edition of the SITEAL report, produced by IIEP and the Organization of Ibero-American States (OEI), provides a global overview of the education situation in Latin America, placing particular emphasis on quality teaching practices. It recommends steps to be taken to respond to current challenges, identifying priority areas to be included in educational agendas for the next 11 years.

See the SITEAL website: www.siteal.org/informe_2010

Review of an IIEP publication

Certification Counts: Recognizing the learning attainments of displaced and refugee students

edited by Jackie Kirk, IIEP series: Education in Emergencies and Reconstruction, 2009, 236 pp. Price: €12



'This book is a truly groundbreaking piece of work and will, in the years ahead, continue to have great relevance to those who stress the importance of cross-border compatibility as a part of humanitarian education work in the context of conflict situations. It is tragic that this was to be Jackie Kirk's last book before she was killed in an ambush while working in Afghanistan. She will be sorely missed by the entire educational community, particularly those who benefited from her tremendous intellectual and humanitarian contributions to the cause of children and communities affected by conflict and disaster, and this book will stand as a testimony to her work.'

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Reviewer: Madhu Singh