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Education and globalization

According to the definition given by Jacques Hallak during the conference on “*Educational Reconstruction and Transformation of Education. Challenges for the 21st Century*”, globalization is a combination of much freer trade in goods and services combined with free capital movements. The phenomenon dates far back in history with the development of international trade. However, for the past few years, we have observed a high acceleration in this trend due to a political and ideological environment eminently favourable to its development and rapid advances in technological innovation, especially in the area of telecommunications. Educational planners – wherever they come from – must think seriously about the consequences of such a phenomenon, particularly in terms of shifts in the job market, in order to better adapt their country’s training system.

Implications of globalization on training needs

International scope is not totally absent from current education systems. For example, at university level, and especially in the areas of science, technology and research, the flow of foreign students has not ceased

*In January 1998 at a conference organized by the University of Bristol’s Centre for International Studies in Education,¹ Jacques Hallak presented a paper on the following theme: **Education and globalization**. Later, in March 1998, the Director of IIEP again debated this theme with participants in IIEP’s Annual Training Programme. Some of the ideas that arose during these two conferences and ensuing discussions are outlined below.*

growing over the past three decades. It is estimated today at over a million individuals. All the same, in most cases, the teaching provided does not meet the new demands being created by globalization.

Thus, as Mr. Hallak emphasized during his two presentations, the aim of most existing educational systems, which consists in serving a national economy by training an adequate workforce for definite tasks and allowing a limited elite to acquire management and administration responsibilities, appears somewhat out of step with changes affecting contemporary society. This is confirmed by new forms of illiteracy observed in some of the most developed countries.

To meet the challenges of globalization, it would in fact appear necessary to prepare individuals for a workplace where responsibilities are constantly changing, where vertical management is replaced by networking, where information passes through multiple and informal channels, where

initiative-taking is more important than obedience, and where strategies are especially complex because of the expansion of markets beyond national borders. Therefore, education must help individuals to perform tasks for which they were not originally trained, to prepare for a non-linear career path, to improve their team skills, to use information independently, to develop their capacity for improvisation as well as their creativity, and finally to lay the basis of complex thinking linked to the harsh realities of practical life.

Adapting education systems to deal with the changes

In the booklet based on the speech he delivered at the Bristol conference,² Mr. Hallak drew a distinction between the various fields of educational activity where reforms could be carried out, so as to take into account changes involved in the trend towards globalization. Adapting education systems to

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new training needs is not the only path available, as shown in the *three* examples which follow:

► *Modify the role of teachers:* in order to train independent individuals who are capable of tracking down information, processing it and interpreting it, teachers should review their teaching methods, and move from the role of speaker to the role of guide. To accomplish this it would be important to draw on new information and communications technologies which they should both teach and use in the classroom. This evolution specifically implies that: (i) they have a certain freedom in various areas like teaching methods, the organization of classroom space and the timetable, the possibility of adapting teaching to individual needs, etc. (ii) they be trained in new information technologies, and that they have the necessary equipment at hand, and (iii) their salaries be indexed according to performance criteria and on the basis of regular evaluations.

► *Review certification procedures:* certification procedures should be modified so as to indicate an individual's capacity to adapt to a rapidly changing job market. Criteria should take into account non-cognitive skills (like a talent for teamwork), as well as expertise acquired during a professional career. Moreover, certification should be standardized so as to be widely applicable, and thus facilitate the mobility of students, as well as workers. A certifying body, working either at the regional or international level (which would include representatives from both the supply and demand side of education, as well as evaluation experts) could be created to achieve these goals.

► *Rethink the objectives of each level of education:* the modernization of education systems involves a redistribution of responsibilities among the various levels of education: (i) the accent should be placed on a basic education for everyone, so as to build a society of productive, involved and responsible citizens, capable of reacting and thinking independently on contemporary trends; (ii) higher education should set objectives for training managers, engineers and technicians skilled in dealing with change and analyzing urgent economic

and social problems, so as to provide relevant guidelines for the various participants who make up society; (iii) the role of secondary teaching in this framework raises a problem: should this level of teaching be progressively abandoned, or should it become part of basic education?

Debate on globalization

Among the various questions raised by the trainees in the Annual Training Programme during Mr Hallak's presentation given at the IIEP on 5 March 1998, two comments especially claim our attention:

► *To what degree is Africa involved in the globalization process?* In other words, is it relevant to try and adapt African education systems to globalization in that African participation is low in the financial and commercial movements that are at the source of this phenomenon and the changes which result from it? Also, it should be borne in mind that only the African elite have access to the new information and communication tools which allow economic development.

► *Does globalization pose a threat to continuing cultural diversity?* Are not the new patterns of behaviour required for adapting to globalization (and which are available only through education) based on a western model, i.e. a model which is foreign to the unique values of other regions of the world?

These two questions give rise to many others, including: should one consider globalization as an inevitable process to which all countries must adapt in the end, or is it a passing fad with a limited lifespan? It is impossible to answer these various objections here. However, drawing on Mr. Hallak's remarks, it should be borne in mind that (i) failing to take into account the trend towards globalization runs the risk of marginalizing, even more than at present, some countries excluded from the transnational world economy; (ii) apart from any internal reform, most education and vocational training systems are directly affected by the trend towards globalization to the degree that it favours the

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Changing teachers for a changing world

*UNESCO's fourth World Education Report, entitled **Teachers and teaching in a changing world**, focuses on the role and status of teachers in a world, undergoing rapid transformation, not least in the field of communications and information, an issue which obviously has an impact on teachers. The report examines in some detail the validity of the frequently heard statement that teachers have lost status. It argues convincingly that "what society currently expects from teachers in most countries could be out of proportion to the rewards it is prepared to accord to teachers and the means typically put at their disposal." It also points to the detrimental impact that some very popular, and seemingly innocent, education policies have had on teachers' status.*

TEACHING might not be the most popular profession in the world, but it is undoubtedly the most populated: there are indeed some 57 million teachers in the world, about two-thirds of whom work in the developing world. The irony in this statement hides a preoccupying truth. Teachers are an important force in our societies, not only because of their sheer numbers, but much more because they are the guarantors of the education of future generations, especially in developing countries, where few other resources are made available to schools. At the same time, teachers feel weakened and complain about loss of their status and diminishing respect. A complaint reflected in parents' criticism that teachers and schools are offering an irrelevant and mediocre education.

Although statements about teaching are easily made, by both teachers and policy-

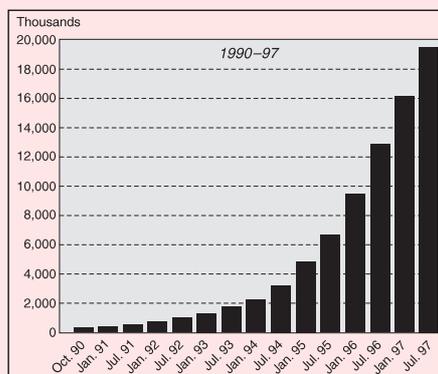
makers, those relating to concepts as status or quality are difficult to verify. The *World Education Report 1998* investigates how changes in the demographic, economic and technological environment have affected teachers and asks if education policies have successfully drawn benefit from these changes to improve teachers' motivation and performance.

The recent economic environment

has taken its toll on the teaching profession. High unemployment levels, which seem endemic in much of the developed and the developing world, are – rightly or wrongly – linked to weaknesses in the education system, which reflects badly on teachers. At the same time, some people enter the teaching profession as a stopgap measure, in the absence of anything better. This has resulted in a lack of

Box 1

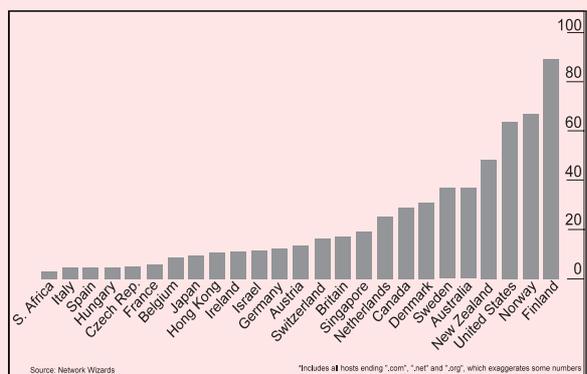
Trends in the number of Internet hosts in the world, 1990-97



Source: Network Wizards (<http://www.nw.com/>) quoted in *UNESCO 1998 World Education Report*.

The Internet is experiencing an exponential expansion, which, however, has so far benefited mainly developed countries. Its impact on education and on teaching in particular is potentially great, but so far of little use to the majority of teachers.

Wired up
Internet hosts per 1,000 population, January 1998



Source: Network Wizards (<http://www.nw.com/>) quoted in *The Economist*, Vol. 346, No. 8056, 21-27 February 1998.

faith in education, a feeling probably strengthened by the ideological mood of the moment, which has turned opinion against the public service and in favour of the introduction of market forces in education. Partly as a result of this, the *Report* claims, teachers are considered to be “carriers of light into dark places, be it tolerance, international understanding or respect for human rights, and, on the other hand, as costly ‘factors of production’ in an enterprise which absorbs a significant proportion of public budgets.” In a number of countries, this pro-market mood has led to breaking down some of the hardearned privileges of teachers and, as we will see further on, to several other strategies with an adverse impact on the teaching profession. At the same time, public authorities – and teachers – are requested to work harder towards Education For All, or EFA.

In the least developed countries especially, achieving EFA is becoming every year more challenging, because of the continued rapid population growth. Combine this with the financial squeeze, in which these countries find themselves, and it is easy to imagine the headaches with which educational planners wake up. The temptation to save on what is the largest budget item (teachers) is difficult to resist, in particular when some research seems to show that such savings can be obtained without sacrificing quality.

Before looking in some detail at how education policies have reacted to this complex environment, the question needs to be asked if technological changes, and the information revolution in particular, could not help improve both the access to and the quality of education. The *Report* briefly touches on the potential of for instance the Internet to render teaching methodology more creative, interactive and individualised. However, it also stresses a number of sobering facts. Firstly, this revolution has so far benefited mainly the developed countries and the more affluent groups (cf. Box 1). The *Report* notes in this regard that “all of Africa, for example, has barely more telephones than the

Box 2

Averages hide disparities and this is particularly true for pupil/teacher ratios, as the following example from Benin shows.

The overall primary-school pupil/teacher ratio in Benin in 1995/96 was high, but – according to some studies – not unacceptably so: 52 pupils per teacher. One school in Atacora department has a ratio, somewhat higher than the average: 414 pupils for seven teachers, including the headteacher, or a ratio of 59 to one.

What this actually means for the total number of pupils in each classroom, is shown in the following table:

| Grade | 1 | 2 | 3 | 4 | 5 | 6 |
|----------------------|-----|----|----|----|----|----|
| Classes/ Teachers | 1 | 1 | 1 | 1 | 1 | 1 |
| Pupils | 128 | 75 | 92 | 35 | 45 | 39 |

Grades one, two and three are obviously overcrowded. One solution would be to employ one additional teacher for each of these grades. However, this would bring the pupil/teacher ratio to 41 to one and would imply significant additional expenditure. Another solution would be to lower the high drop-out rates, but to do this one arguably needs to decrease pupil/teacher ratios.

city of Tokyo”, and that “a majority of the world’s schools still do not have electricity”. Secondly, and more worryingly, teaching has seldom made use of, or demanded, technological innovations (the examples of radio and television are quoted). One reason for this, beyond the obvious financial one, probably lies in the nature of the sector’s work: an activity which has at its heart human interaction and which relies for its success on the quality of that interaction. Reluctance to innovate what is felt to be at the core of teaching is therefore to be expected. On the other hand, it is true that the computer is probably the most child-friendly (and hence the most teacher-threatening?) of these recently developed tools.

It could be argued that the information age has, to date, had a detrimental impact on teachers’ status. While teachers used to be one of the few voices of authority for any child, now – with the expansion of informal learning opportunities – they have merely become one of many references and, in many cases, one that is rather out of step with reality.

Depending on the context and especially the financial room for manoeuvre, policy-makers have responded in different ways to the challenges described above. In the less developed countries, spending on the

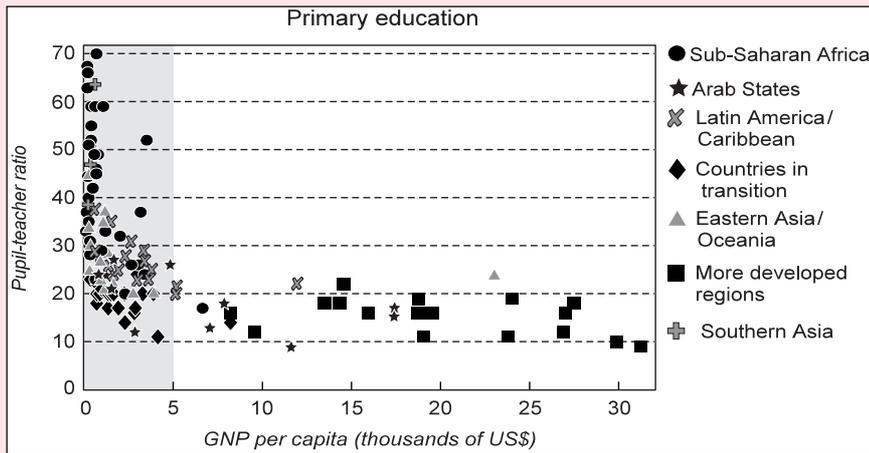
main ‘input’, namely the teachers, has been cut in three main ways by:

- hiring teachers on specific contracts with lower remuneration and fewer rights;
- employing teachers with less qualifications;
- increasing pupil/teacher ratios and introducing ‘staff saving’ modes of teaching, e.g. double-shift schools and multigrade classes.

The two last strategies in particular have been promoted by, for instance, the World Bank, which refers to a number of studies showing that the quality of education does not suffer from these measures. The *Report* usefully challenges this picture. With regard to pupil/teacher ratios, it notes for instance that the debate so far has focused on cognitive outcomes, and that little is known about the acquisition of personal and social skills and attitudes, especially among poor learners. Large classes, moreover, are bound to have an impact on teachers’ motivation and stress. In addition, when pleas are made to raise pupil/teacher ratios to 45 or 50 to one, little attention is given to the fact that these are averages, which naturally hide extremes, within the country and between grades. The early school years will be particularly overloaded, because of the high drop-out rates (cf. Box 2). The fact finally that the more

Box 3

GNP per capita and pupil-teacher ratio in primary education, by region.¹ 1995.



1. Individual countries within each region are represented by dots, diamonds and squares.

Source: 1998 UNESCO Education Report. Paris: UNESCO, 1998.

developed countries have almost systematically tried to increase the qualifications of teachers and to lower the pupil/teacher ratios seems to show that these options, when affordable, are preferable (cf. Box 3).

These 'teacher-cost-saving' policies, the *Report* stresses, are fed by an indiscriminating use of the cost-effectiveness approach to education, which views teachers as an input rather than a 'creative partner'. Interestingly, what seem to be more 'innocent' policies have also led to greater demands on teachers, in part because of a poor understanding of their needs and situation. The emphasis on creating competition between schools, for instance, is justified by the

belief that such competition will almost automatically lead to improved teacher and school performance. However, so far, little is known about the ways in which teachers change their practice and how to motivate them to do so, except for the fact that it is not doing well. Moreover, improving education quality might well need more co-operation between schools and teachers rather than more competition.

The *Report* comments in the same vein on the present concern with improving quality and setting up mechanisms to monitor learning achievement. Teachers are aware that this concern "has not generally been matched up to now by a greater

willingness in national development policies to provide more resources for education." This has led to an increased sense of isolation among teachers.

The above should not be read as an indication that all countries have disregarded teachers' needs. Several, such as Sri Lanka and Namibia for example, recently increased their salaries significantly. Surprisingly enough, this has apparently not led to a visible improvement in their efficiency or performance. Perhaps this is not so startling: it confirms that to change teachers, it is not sufficient just to raise their salaries, but that more comprehensive policies are necessary. The *World Education Report 1998* gives few indications on how teacher policies should be changed. Recent research shows that such policy packages should include strategies to improve their working conditions, to strengthen feedback and support, including through practice-oriented and school-based in-service training, to set up structures which allow more interaction and co-operation between teachers, to develop motivational career ladders, to get communities to show an interest in their teachers. It is only by giving teachers more support and more authority that more can be expected from them.

ANTON DE GRAUWE

FOR FURTHER READING ...

Two IIEP programmes give specific attention to teachers' issues and several recent or forthcoming publications examine in particular teacher management and supervision.

The following publications were prepared in the framework of the project on **The management of teachers**.

- *The utilization, deployment and management of teachers in Botswana, Malawi, South Africa and Uganda*. Synthesis report on a sub-regional workshop and four country monographs. (forthcoming) Paris: UNESCO/International Institute for Educational Planning.
- *La gestion des enseignants dans quatre pays d'Afrique francophone (Bénin, Burkina Faso, Mali, Sénégal)*. Rapport de synthèse sur un atelier sous-régional et

quatre monographies nationales. (forthcoming) Paris: UNESCO/International Institute for Educational Planning.

- A. Traoré. 1997. *La gestion du personnel enseignant en Afrique francophone*. Paris: UNESCO/International Institute for Educational Planning.

The programme on **Improving teacher supervision and support** has so far prepared the following studies and monographs:

- Carron, G.; De Grauwe, A. 1997. *Current issues in supervision: a literature review*. Paris: UNESCO/International Institute for Educational Planning.
- Perera, W. J. 1997. *Changing schools from within: a management intervention for improving school functioning in Sri Lanka*. Paris: UNESCO/IIEP.

- Khaniya, T. R. 1997. *Teacher support through resource centres: the Nepalese case*. Paris: UNESCO/IIEP.

- Ali, Mehruhnisa Ahmad. 1998. *Supervision for teacher development: a proposal for Pakistan*. Paris: UNESCO/IIEP.

- *Improving teacher supervision and support in Asia: a comparative analysis of the experiences of five countries: Bangladesh, India, Korea, Nepal and Sri Lanka*. (forthcoming) Paris: UNESCO/IIEP.

- Fergusson, V. *Reforming school supervision and quality control in a context of school based management: the New Zealand experience*. (forthcoming) Paris: UNESCO/IIEP.

A success story

A new interface to the data entry manager, or DEM, software developed by IIEP is now being used by the IEA for the TIMSS Surveys.

IN February 1998, the Director of the International Institute for Educational Planning received a letter from the Executive Director of the International Association for Evaluation of Educational Achievement (IEA). The letter indicated that the IIEP version of the new interface to the Data Entry Manager (DEM) software has been contributing to the success of the IEA's *Third International Mathematics and Science Studies* (TIMSS) – both for the 1996 study involving 41 countries and for the 1998 TIMSS replication study.

What is DEM?

In order to monitor the quality of an education system, one of the most crucial steps is the collection and processing of data needed for informed decision making. This can be a problem in many educational planning offices because insufficient attention is paid to the preparation of data prior to analysis on the computer. Data of poor quality can cause extensive delays in the subsequent survey implementation. The Data Entry Manager interface has been developed in order to address this problem. It helps to minimize

errors at the data preparation phase of the research cycle.

How was it developed?

The original DEM software, developed by the IEA in 1989 and used for its Reading Literacy Study undertaken in 32 countries, mainly targeted high-level computer experts. Recognizing the software's importance in large-scale educational research, the IIEP, in co-operation with the IEA, started to develop a new user interface (DEM008.OVL) which provided an easy-to-use data entry editor enabling educational planners to set up simple structure files which could be used to enter and clean data without the aid of professional statisticians. This new interface underwent various trials in several training workshops in 1994, and the finalized version was used in IIEP's research programmes during 1995. A French version of the DEM was produced in 1997, and since then both versions have been used by participants in the IIEP's Annual Training Programme.

Special features

One of the most important features of this new interface is its multi-level

controls for the quality of the data being prepared. For each variable, there are ways to establish specifications in order to ensure that: *i)* correct identification codes are assigned, *ii)* unadministered or unanswered questions, incomprehensible or out-of-range responses, and invalid entries are all handled properly, and *iii)* inconsistencies between questions, within a group of respondents, and between files are also intercepted. Secondly, the software provides automatic saving, smooth switching between the different modes of data preparation (data entry, data cleaning, data verification, data repair), and is compatible with popular data analysis software. The third factor in its favour is that the software is easy to use and does not require sophisticated hardware.

How to obtain your copy

The Data Entry Manager software is distributed free-of-charge to all participants in IIEP training programmes. All other external requests should be made directly in writing to the Director of the IIEP.

MIOKO SAITO

☞ continued from p. 2

emergence of new educational resources (especially from the private sector) and novel approaches (e.g. consumer-driven) within the field of education; *iii)* finally, if globalization inevitably involves the risk of cultural and technological 'colonization', it should not be assumed that attempts to adapt to this phenomenon pose an actual threat to local identities.

To conclude, it is regrettable that the theme of regionalism was not mentioned at any point during the debate, since it would allow the problem of globalization to be approached from a slightly different angle, perhaps one that is more acceptable to most of the countries affected.

MURIEL POISSON

¹ Conference on *Educational Reconstruction and Transformation. Challenges for the 21st Century*, organized between 5-7 January 1998 by the Centre for International Studies in Education, University of Bristol, Bristol, United Kingdom.

² Jacques Hallak. 1998. *Education and globalization*. IIEP Contributions No. 26. Paris: UNESCO/International Institute for Educational Planning, 1998.

Partnership in training policy

Does partnership make it possible to improve the efficiency of technical and vocational training policy? The frequent appearance of this term in specialized literature and also its influence on government policies leads one quite naturally to ask the question. Unfortunately, a lack of perspective and especially of relevant data make it impossible to accurately gauge the impact of this new kind of government practice. All the same, one can perhaps prepare the ground by attempting to probe the real meaning of the term and pass in review some concrete examples. Indeed, policy documents rarely provide any precise explanation on the rationale of partnership and how it works. The article below attempts to discuss this issue further...

IN technical education and vocational training, partnership aims principally at mobilizing collective effort so as to improve the efficiency of the system and its contribution to the economic and social goals which are assigned to it. In other words, by involving the relevant stakeholders, especially the business community, it strives to make vocational training more responsive to the job market which is today undergoing massive transformation everywhere. Partnership thus appears at first glance as a means of achieving a higher degree of efficiency in the use of public money. It must also contribute to mobilizing outside resources in the form of expertise and private investment. In addition to this technical dimension, partnership also involves a political vision. The mobilization of key players, concerted effort, and dialogue are also considered as a way of regulating training resources democratically and through consensus. Partnership is not just concerned with initiative-taking and management, it is also a value system and a goal. In this respect, there is an evident connection in several countries between democratization and partnership initiatives (South Africa, Mali, Hungary, etc.).

From the research viewpoint, recent theoretical development influencing public action tends to support a trend in favour of partnership. For example, institutional economics, rejecting both the orthodoxies of traditional planning and pure market mechanisms, seek to understand the motivation of economic agents in order to improve governance through participation and co-ordination. Sociologists specializing in organization theory draw similar conclusions in their analysis of collective action and the negotiating process conducted among key players. Those on the front line intuitively understand the need for co-ordination, as they are faced with the complexity and variety of partners involved in technical and vocational training. In the absence of clear proof that partnership is a source of efficiency, theory and experience thus tend to support the idea that, in the medium term, it can make a significant contribution to policy reform.

Encouraging employers to get more involved

It seems obvious that the state and the business community are natural partners in the area of education and training for the working life. However,

the structure of partnership must extend beyond them to include trade unions, parent/teacher associations (PTAs), vocational institutions, and NGOs, all of which are key players. Their degree of involvement varies according to the area, whether initial or continuing education, or according to the level of decision making: national, regional or local. As for continuing education, the participation of both employers and employees seems self-evident. This is an important theme for social dialogue and collective negotiations at the national level, as well as at the industrial or corporate level. Thus, in France, a study done by the Department of Labour and Social Affairs concerning collective bargaining among industries revealed that, in 1996, vocational training and apprenticeship were a prime concern for salaried workers, after salaries and bonuses.

The participation of social partners in the management and monitoring of technical education and initial vocational training is often less evident. In fact, their degree of involvement varies according to tradition and the structure of the technical and vocational education and training system. For example, it is evident that in many

German-speaking countries, where apprenticeship is a highly favoured path for obtaining professional qualifications, the social partners have a structurally important role to play.¹ But in most other countries, getting businesses to commit themselves to training young people is hard to achieve. This difficulty is compounded in periods of crisis or economic uncertainty. The problems that the dual German system is encountering today, and the temptation to introduce compulsory legislation to obtain what was traditionally granted voluntarily illustrates this phenomenon perfectly.

Ironically, it is precisely when an economic downturn forces business to opt out of training programmes that in many countries the public authorities want to saddle them with extended responsibilities, especially for helping young people to fit into the job market. In fact, they are often considered to be the best placed to provide the right kind of training, and also to teach the values and attitudes applicable to working life. This wish sometimes also coincides with a political idea which assigns business a social role alongside their economic one. Such thinking also implicitly assumes that this social mission goes hand in hand with economic efficiency. Here again, structural conditions play a key role and countries which give high priority to social dialogue and collective negotiations find it much easier to mobilize employers concerning youth-employment schemes. This is how business is induced to contribute to active labour market programmes for young people in several European countries. Similar youth employment schemes can be found in other parts of the world as well, especially in Latin America, where the organization of the job market often follows models derived from continental Europe. In Argentina and Chile, businesses are closely involved in an ambitious youth training programme, called *Proyecto Joven* (the Youth

Project).²

Countries in transition offer a radically different pattern, for it is not so much a lack of involvement of social partners which is deplored but their non-existence.³ Thus, stakeholders must pass through a phase of social construction, during which the main protagonists coalesce, often as part of a tripartite organization. These mechanisms and structures for social dialogue which are gradually put into

“Ironically, it is precisely when an economic downturn forces business to opt out of training programmes that in many countries the public authorities want to saddle them with extended responsibilities.”

place with the support of the government, clearly illustrate a transition from administrated regulation to a co-operative approach. Thus, in Hungary, the creation in 1991 of a national training council laid the basis for incorporating training within a wider social dialogue.

Despite its rapid progress, the theme of partnership seems, at first sight, to have limited applicability to many countries, especially in Africa where the major portion of the active population lives outside the formal sector. However, the experience of some countries which are creating genuine co-operation between the state and representatives from the informal sector has shown that the concept of partnership can be applied beyond the limits of the modern economy. In Mali, the dialogue launched between the National Federation of Malian Craftsmen and the public authorities allowed apprenticeship to be organized, and gave micro entrepreneurs access to training. This example shows that under certain conditions partnership can express a principle of economic and social democracy which can apply to all sectors, without neglecting the most disadvantaged members of society.

Incentive mechanisms

When the culture and the structural conditions do not naturally lead to co-

operation in the definition and the setting up of training policies, the public authorities must provide adequate means for encouraging the various parties concerned. Redefining the legal framework is a necessary condition for setting up partnerships and making them work. In many countries, the establishment of payroll tax to finance training has provided the stimulus for shared management between the state and its social partners.⁴ However, far more effective than forced participation is voluntary adhesion, which best expresses the spirit of partnership. In this respect, incentives such as tax rebates play an important role in encouraging training investment. The contractual approach, whereby public authorities and businesses commit themselves to a negotiated project for the development of training programmes, also expresses the willingness to use partnership as a form of public action. As for financing, fiscal incentives and contracts do not necessarily exclude legal obligations. On the contrary, they allow scope for manoeuvre by creating zones for initiative taking, and dialogue which can lead to mixed forms of regulation. Besides the financial aspects, partnership at the central level often involves other key concerns like the drawing up of curricula and pathways, and increasingly, certification procedures.⁵

Partnership at the local level

However, it is certainly at the local level that partnership finds its clearest expression through co-operation between businesses and training institutions. These links are most often designed to allow for periodic training periods, or industry-tailored courses. But they also frequently aim at providing guidance for young people, retraining teachers, or even the setting up of programmes to meet specific needs of the local economy. The trend towards decentralization moreover multiplies opportunities for co-operation at the local level. Nevertheless, transforming public institutions into stakeholders on the local scene

presupposes providing them with a legal framework and decision-making powers. Such status must grant institutions a genuine autonomy in several areas: legal, financial, pedagogical and management. Despite the expected benefits, these trends give rise to some delicate questions on the financial and managerial capacity of local actors. The relevance of a local and concerted regulation of the training 'supply' also presupposes an adhesion to a national framework, to avoid the risk of hampering the mobility of the workforce and ending up with a somewhat irrational use of public resources.

In a nutshell, partnership in technical education and vocational training can be summed up in a few simple observations. First, dialogue takes time; it slows down and complicates decision making and therefore involves a cost factor. The transition process in South Africa, as well as

curricula reform within the dual German system, clearly illustrate this problem. Next, the review of national experiences shows that partnership is often conditioned by history. When the apparatus for social dialogue, like collective agreements, find themselves solidly rooted in national tradition, it is easier to extend these practices to technical and vocational training for young people. Without this historical background, the setting up of partnerships pre-supposes a favourable environment, and this means organizing a legal framework and providing fiscal incentives and other forms of encouragement.

Between the two extremes of reliance on bureaucratic rules and on market forces, partnership seems to offer another alternative for regulating training systems. Regardless of specific national conditions, economic and institutional constraints, as well as political changes, reinforce the ra-

tionale for partnership as a way of coordinating the provision of technical and vocational education and training.

DAVID ATCHOARENA

A deeper analysis of this topic can be found in the following book:



D. Atchoarena. *Le partenariat dans l'enseignement technique et la formation professionnelle: le concept et son application*. New trends in technical and vocational training. Paris: IIEP, 1998. Price: FF15/US\$3

1. X. Greffe. 1997. *La mise en place de formations initiales en alternance: enjeux, problèmes et solutions*. Paris: UNESCO/International Institute for Educational Planning, 1997.

2. C. Jacinto; M.A. Gallart. 1998. *La evaluación de programas de capacitación de jóvenes desempleados: Una ilustración de los enfoques evaluativos en los países del*

Cono Sur. Paris: UNESCO/International Institute for Educational Planning, forthcoming.

3. G. Prokhoroff; D. Timmermann. 1997. *Five years later. Reforming technical and vocational education and training in Central Asia and Mongolia*. Paris: UNESCO/International Institute for Educational Planning, 1997.

4. D. Atchoarena. 1994. *Financement et régulation de la formation professionnelle: une analyse comparée*. Paris: UNESCO/International Institute for Educational Planning.

5. O. Bertrand. 1997. *Evaluation et certification des compétences et qualifications professionnelles*. Paris: UNESCO/International Institute for Educational Planning.

Seminars on Current Issues in Educational Planning

THE following *Seminars on Current Issues in Educational Planning* were organized at the IIEP in Paris for the 1998 Spring Term:

❖ 27 February 1998. *Adapting information systems to EFA objectives: The case of the French-speaking African countries* by Michel Debeauvais, Emeritus Professor, University of Paris 8, France.

❖ 24 March 1998. *How students finance themselves in France* by Jean-Claude Eicher, Emeritus Professor, University of Bourgogne, France.

❖ 13 May 1998. *New borders for education: Redefining the role and sites of education in the future* by Professor David Mitchell, Director of International Programmes, School of

Education, University of Waikato, Hamilton, New Zealand.

Although the initiator and arduous organizer of these seminars, Bikas C. Sanyal, is retiring end-May 1998, this series will be continue under the direction of Kenneth N. Ross as from October 1998. So don't forget ... should you be passing through Paris, contact the IIEP to see whether a seminar coincides with your visit.

Designing development projects in basic education

*An intensive two-week training course on **The design of development programmes/projects in basic education** for selected countries of the English-speaking Caribbean was held in Castries, St. Lucia, from 9 to 21 February 1998. The course was organized by the IIEP in co-operation with the Ministry of Education, Human Resource Development, Youth and Sports, Saint Lucia.*

THE overall objective of the course was to introduce the participants to issues involved, and methods used, in the identification of educational projects, within a specific national policy context and to provide them with an opportunity for hands-on experience in project elaboration.

Course participants came from eight English-speaking countries in the Caribbean i.e. Barbados, Dominica, Grenada, Jamaica, St. Kitts and Nevis, Saint Lucia, Saint Vincent and The Grenadines, and Trinidad and Tobago. They included experienced practitioners, with a range of professional profiles, some of whom hold high- and middle-level management positions in ministries of education. Others came from a ministry of finance and a tertiary level institution. Although several participants had prior practical experience in project design or management, the majority had no previous formal training in the subject.

The course had an applied, practical orientation. A first day was spent on the presentation and discussion of national experiences with education development projects, which are either completed or still under implementation. The preparation of these presentations by the different teams had been part of the preparatory work, requested from participants who had been admitted to the course.

During the remainder of the course, lecture and discussion sessions alternated with case-study exercises. Lectures in plenary focusing on

theories and concepts, were illustrated by examples drawn from international and regional experiences. Practical exercises in working groups were built around the elaboration of project documents, based on the case study of a fictitious Caribbean country, **Caribba**.

The course benefited from the experience gained in previous similar courses held in other regions. However, this time, there was a complete integration in the practical exercises of the 'problem tree' and 'objective tree' analysis as well as the Logical Framework approach; furthermore, the use of special computer software for preparing and revising the main tables of the project design i.e. work plan, staff recruitment and training, yearly and total costs, additional anticipated recurrent costs after project completion and the Logical Framework chart.

The dispersion of participants in the different working groups was done in such a way as to ensure an equitable composition both in terms of nationality and professional experience. The participants fully adhered to the simulation activities of the practical exercise. The pragmatic work organization adopted, allowed the groups to progress very rapidly and the working climate was very good.

The development projects identified and prepared by the three working groups all focussed on the competency and motivation of the primary school teachers as a means to

improve the quality of education. There were interesting differences between the projects and the strategies elaborated, testifying to the rich and varied professional experience and creativity of the participants. The discussion in working groups and the project documents prepared by the participants illustrated that the main points of the course had been well assimilated, namely to:

- analyse and discuss as realistically as possible the educational situation and policy prior to defining a strategy and subsequently elaborating a project;
- anticipate likely implementation difficulties;
- carefully examine the sustainability of the project.

The half-day presentation and discussion devoted to *negotiation of education development projects*, turned out to be both passionate and instructive. The focus was less on negotiations with donors than the process of preparing, negotiating and following-up projects between the Ministry of Education and the Ministry of Finance on the one hand, and between various departments within the Ministry of Education on the other. The last course session consisted in the presentation of projects prepared by the three working groups each of which had to advocate their proposal, applying a number of common criteria. This combination of approaches was highly appreciated by the participants. Those who felt less confident with assimilating the more theoretical parts

of the course, presented during the lectures, felt that applying the concepts during practical exercises helped them to master course contents well.

Informal feedback received during the course and the final course evaluation showed that the participants perceived the course as very important for their work, and that they appreciated the combination of approaches and applied orientation of the course.

The pedagogical and social condi-

tions in Castries were excellent. The only complaint made concerned the lack of time given to discussion of all aspects of the practical exercise, equally in-depth during the working group sessions. Contacts made with officials from other countries of the region, during the two weeks of training, were seen as very beneficial.

Several participants stressed the importance of maintaining links between participants and, more generally, between educational plan-

ners and administrators of the sub-region to enable them to exchange experiences, through networking. Some participants will immediately apply what they have learned to their national contexts. For instance, Dominican participants are developing an in-service teacher education project to meet the needs of untrained teachers, trained teachers and school principals.

DOMINIQUE ALTNER, LARS O. MÄHLCK
AND PIERRE RUNNER

RECENT PUBLICATIONS

Creating space for women

HISTORICALLY, women played little role in the conceptualization and organization of the university. The fact that increasing numbers of women are working in higher education institutions makes it essential for managers to reflect on the impact of the masculine bias which prevails in some organizations, on both male and female staff, and its impact on organizational efficiency. In the context of increasing and increasingly varied demands on higher education institutions under budget constraint, the efficient and effective management of resources is essential if the university is to maintain its role in society and evolve to meet new needs.

This booklet by Anna Smulders, Educational Consultant, sets out to show why gender and gender-related management issues are an important aspect of efficient staff management. The research behind it was undertaken through a series of in-depth interviews with a number of male and female academic staff and career administrators in an Indian university. The concept of gender, which relates to the socially determined role and responsibilities of the individual, was the key tool of analysis. The objective of the interview process was to identify any

gender-related aspects of practices that could have an impact upon the career progress of staff.

The findings of the study point to the fact that the internal structure of the university and day-to-day practices lead to differences in career patterns that are related to gender. They highlight that:

- the problems faced by professional women are structural in nature,
- female responsibilities and images are incompatible with the existing (masculine) organization.



Creating space for women: Gender-linked factors in managing staff in higher education institutions, by Anna E.M. Smulders. IIEP research and studies programme series. Paris: UNESCO/IIEP, 1998. 64p. Price US\$3/FF15

According to the author, it is this incompatibility which explains the different impact that organizational structure, culture, and management practices have on men and women.

Ms Smulder's findings are important to the objective of ensuring optimal human resource management. Over the years, attempts have been made in many settings to increase the number of female staff members. With a change in the staff profile, it may be necessary to re-evaluate, and possibly modify, existing institutional policies and procedures in order to ensure the professional well-being of all staff.

Intended to raise awareness with regard to problems that are not often recognized, and therefore not addressed, the booklet offers a number of possible areas for reflection that could be useful to those in charge of higher education institutions.

SUSAN D'ANTONI



'Beeb' – an intellectual architect of modern education

Dr. Clarence Beeby, one of the world's leading exponents of 20th century educational principles, died in New Zealand on 10 March 1998, aged 95.

'Beeb', as he was affectionately known, was New Zealand's Assistant Director of Education in 1939 when he added a few sentences to the draft of the Annual Report of the Ministry of Education. What Beeb wrote, expressing his own deep-rooted beliefs, had a profound effect on the development of education, not only in his own country but worldwide.

He wrote: "The Government's objective, broadly expressed, is that every person, whatever his level of academic ability, whether he be rich or poor, whether he live in town or country, has a right, as a citizen, to a free education of the kind for which he is best fitted and to the fullest extent of his powers."

"Formal education beyond primary level is no longer to be a special privilege... but a right to be claimed by all who want it to the fullest extent that the State can provide".

"It is not enough to provide more places in schools of the older academic type that were devised originally for the education of the gifted few. Schools that are to cater for the whole population must offer courses that are as rich and varied as are the needs and abilities of the children who enter them."

Here was a blueprint for a modern education system and with the publication of the report and acceptance by parliament, New Zealand became perhaps the first country to implement the ideals of equality and education for all. Fifty years on, the **World Conference on Education for All**, convened jointly by the executive heads of UNDP, UNESCO, UNICEF, and the World Bank, was held at Jomtien,

Thailand, 5-9 March 1990. The conference's World Declaration, signed by representatives of 155 governments, echoed closely the sentiments earlier expressed by Beeb.

Beeb was New Zealand's Director-General of Education from 1940 to 1960, with a leave of absence in 1948-49 when he was appointed Director of UNESCO's Department of Education. He was leader of the New Zealand delegation to all UNESCO General Conferences from the founding of the Organization in 1947 until 1960, becoming New Zealand's Permanent Delegate to UNESCO from 1960 to 1963 (coinciding with his appointment as New Zealand's Ambassador to France). Beeb was to acknowledge (in his biography published in 1992) that "UNESCO played a vital part in the development of my understanding of education in developing countries".

In the early years of the International Institute for Educational Planning, Beeb played a key role. He was appointed General Editor of the 'Fundamentals of Educational Planning' series and was responsible for the early booklets in the series which continues until this day. He also co-organized and chaired an international symposium for IIEP on the 'The qualitative aspects of educational planning with particular reference to developing countries'. Afterwards, he admitted: "In helping to prepare for this symposium I took comfort from the fact that most of the writers of the working papers professed to find the topic as elusive as I did. Very little had previously been written on theories of

quality of education in developing countries, and every man had to find a starting-place for himself."

He concluded his report on the seminar in a typical down-to-earth manner: "Quality in education is not an absolute. It can only be evaluated in terms of arbitrarily determined standards, and these in turn depend partly on subjectively formulated aims and partly on objective statistical procedures. From any scientific point of view, to argue otherwise is to vanish into a cloud-cuckoo-land."

As it turned out, the report on the seminar was one of the most influential (and most widely quoted) publications ever issued by the Institute.

Afterwards, during the period 1972-88, he gave invaluable advice on the Institute's future directions as a member of the IIEP Council of Consultant Fellows.

In a tribute to Beeb, the present Education Secretary of New Zealand, Howard Fancy said: "For seven decades, he was a teacher, researcher, writer and educational administrator. He was the intellectual architect and inspiration of the foundations of our education system as we know it today. Both at home and overseas, he initiated policies that sought to achieve equality of educational opportunity. His probing intelligence was combined with the practical ability to devise policies that gave expression to abstract



"An institution in touch with its environment"

□ Study visit of IIEP Trainees to Iceland

(15-23 April 1998)

At the invitation of the Icelandic government, the group of 38 trainees participating in IIEP's 1997/1998 Annual Training Programme undertook an eight-day visit to Iceland to study the country's education system. The visit was both interesting and beneficial, as well as enjoyable. Iceland is in many respects a unique country, characterized by a hostile natural environment, a cultural and ethnical homogeneity, a well developed economy with a sparse population and a people proud of its culture. However, the country is very much part of the globalization process, and several of its education policies are influenced by changes taking place in other countries.

Undoubtedly the most important recent reform in education concerns the decentralization of responsibilities for compulsory schools, from the Ministry of Education to local authorities, closer to the schools and the parents. The strategies used, the problems encountered and results achieved constituted one of the three topics reviewed by the IIEP trainees during the study visit. The other two topics concerned, respectively, *Teacher support, management and evaluation* and *Diversifying secondary education and expanding access to higher education*.

Visits were organized to primary and secondary schools, to the University College of Education and the University of Akureyri, Iceland's second most important town. All these institutions provided trainees with an opportunity to meet and discuss informally with both teachers and students to gain a deeper insight into Icelandic education policies.

The visit also helped trainees to understand the Icelandic people, to appreciate their history and culture as well as the country's unique natural beauty. A cultural evening took place at the National Gallery of Iceland and another evening was set aside during which all members of the study tour were invited to dine with families in their homes.

Among the aspects of Icelandic education which particularly impressed the group were: the child-participatory pedagogy and the creative school architecture, the accent on negotiation rather than confrontation in educational decision making and the success of the decentralization policy, which has given financial power to those taking the pedagogical decisions.

Iceland will undoubtedly bring back fond memories to this year's trainees.

□ Distance Education Course on 'Strategic financial management in institutions of higher education'

*(Southern African Countries
4 May to 31 July 1998)*

Building on the experience gained in a similar distance education course organized for universities in the Russian Federation, over a period of ten weeks from May to July, the

IIEP will be organizing a new distance education activity on the topic of strategic financial management for around 70 participants from 15 higher education institutions in English-speaking Southern Africa – the target group being senior- and middle-level financial managers of higher education institutions. The course will cover trends and international experiences in higher education institutions, issues and approaches to financial management, as well as a scenario-building exercise to explore alternative strategies. The training materials and exercises will be delivered by e-mail to clusters of participants located in the selected universities. These clusters will discuss issues, techniques, exercises and strategies for improvement before interacting, through electronic mail, with other participants and the tutors in Paris.

□ Sub-regional intensive course on 'Using indicators in planning basic education: methodological aspects and technical tools'

*(Maputo, Mozambique
6-17 July 1998)*

Organized by the IIEP in co-operation with the Ministry of Education in Mozambique, this course will target around 20 participants from ministries of education in Angola, Cape Verde, Guinea-Bissau, Mozambique and São Tomé and Príncipe. Fourth in this series of courses, and second of its kind in Africa, the purpose of this training is to strengthen participants' knowledge of the concepts, methods and techniques required to produce an annual report of key indicators on the functioning of their country's education system.

ideas and convictions. And he had the gift of communicating his vision to others."

In all of this story of professional success, Beeb was also a wonderful human being who never lost touch with his roots. He translated his ideas

into policies and never hesitated to practice what he preached. Even today, it is still recalled in New Zealand that, for example, he was one of the longest serving students at his local polytechnic in night-class woodwork – he would pack up after a day as the

Director-General of Education and head off to woodwork classes!

IIEP, UNESCO and the world of education as a whole will, for many a long year, stand indebted to this intellectual architect of modern education.

Reducing repetition: issues and strategies

Repetition rates are a powerful measure of educational efficiency. In this new booklet in the IIEP Fundamentals Series, the author, Thomas O. Eisemon of the World Bank, reviews the causes and consequences of high repetition, highlights how global trends often conceal regional and even sub-regional 'cultures' of repetition, and illustrates how difficult it is, despite a panacea of policy prescriptions, to target effective intervention ...

REPETITION rates can reach very high levels in some countries. According to the 1995 UNESCO *World Education Report*, the proportion of repeaters in primary education was higher than 20 per cent in some 22 countries, and in six countries more than one pupil out of three was actually repeating. If one considers that many of those repeating finally drop out, one can understand the extent of the problem. Considerable amounts of money are spent in different countries, forcing pupils to repeat their grades, and both planners and policy-makers need to find ways of reducing this phenomenon. However, the issue is not as simple as it looks: policy measures to reduce or eliminate repetition cannot be successfully designed unless the causes for high repetition are clear.

Repeating is a multi-dimensional issue and keen subject of debate among educationalists. *Economically*, asking 20 to 40 per cent of pupils to repeat a year is very expensive – how many more pupils could be enrolled within the same budget framework if repetition were abolished? *Pedagogically*, pupils repeat because they have been absent too often for different reasons and/or are not considered as having reached the required level to move up to a higher grade, but a number of studies prove that repeating is not the answer to low educational achievement. However, teachers unable to handle heterogeneous classes are reluctant to reduce

repetition. *Psychologically*, repetition puts the responsibility of failure onto the pupil rather than onto the teacher, the school or the system. In certain countries, but not all, there is a high correlation between repetition and drop-out. *Politically*, in countries which cannot afford to provide open access to secondary or higher education, repetition is used to regulate student flows: those who fail the entrance exam are given a second chance and restricting this possibility would be badly received by both parents and students.

Repetition rates are much higher in some countries than others. For instance, in Southern Europe and developing countries with Franco-, Hispano- and Lusophone traditions, repetition is common, whereas in Northern European countries, and developing countries influenced by their tradition, the tendency is to opt for automatic promotion. Once again, there is no evidence that pupils in the first group of countries have a higher achievement level than those in the second group.

Thomas Eisemon's monograph reviews the magnitude of repetition in different countries. The causes are analyzed – some linked to the child and family characteristics, others to the teaching/learning conditions in the school and teaching practices, and others to the system itself and to policies implemented. Girls, children

of cultural minorities and all those who have to work and contribute to family incomes, repeat more than others. The author underlines how repetition is 'cultivated' in some countries and advocates systemic measures to reduce the phenomenon.

In the last chapter, the focus is on policy options and country experience. Different countries have different characteristics and causes of high repetition which need different remedies to be identified and implemented.

The strengths of Mr Eisemon's

booklet lie in the very clear and straightforward manner in which the arguments are presented. He uses examples from a variety of developing countries, each with a different history, and this allows him to have a very balanced view. He demonstrates how high repetition rates often reflect poor learning environments and structural weaknesses which cannot

easily be changed through standardized policy remedies or through automatic promotion.

FRANÇOISE CAILLODS



Reducing repetition: issues and strategies
by T.O. Eisemon. IIEP Fundamentals No. 55. Paris: UNESCO/IIEP, 1997. Price: FF50/US\$10.

We wish to inform our readers that, at the time of printing this issue, we learned the sad news of Mr Eisemon's sudden death, late April 1998.